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Customer Success QBR Notes — Q3 FY2024

Prepared by CS Team | October 1, 2024 | INTERNAL

Metric	Q3 Value	vs Q2	Status
Accounts with QBR completed	11 / 14	+2	✓ On track
Avg CSAT (post-QBR)	4.6 / 5	+0.2	✓ Strong
Renewal risk accounts	3	+1	■ Monitor
Expansion opportunities ID'd	4	+1	✓ Good
Executive sponsor gaps	2	same	■ Action needed

Account QBR Notes

Apex Financial

HEALTHY

QBR held Sept 12. CISO David Cheng expressed interest in expanding to 970 seats (+14%) citing new trading desk onboarding. TI Add-on renewal confirmed — strong value realization. NPS respondent: +58. Exec sponsor: David Cheng (CISO) + Mark Osei (CTO). No risk flags. Expansion deal in Q4 pipeline (D-expansion-001, \$47K ACV).

Meridian Trading

AT RISK

QBR attempted Sept 18 — rescheduled twice. Finally held Sept 25 via video only; incoming CTO Li Wei attended but no decision authority on renewal. CrestPeak acquisition context: IT freeze on all vendor spend >\$50K pending integration review. CSM Wei Zhang has weekly check-ins. Primary risk: acquisition clause in contract allows 60-day termination notice post-close. Board notification threshold met per policy §5.3. Recommended: CRO-level engagement + 15% save discount offer before Nov 30.

Vantage Capital

HEALTHY

QBR held Aug 28. Smooth renewal conversation — auto-renew confirmed. 595 active users out of 620 contracted (96%). Minor ask: enhanced reporting for compliance team. Logged as feature request. Exec sponsor stable: Sarah Mills (COO).

Castlepoint Insurance

HEALTHY

QBR held Sept 5. Very positive — CSAT 5/5. Seat utilization at 90% and growing (150 contracted, 135 active). Discussion of expansion to 200 seats in H1 FY25. RIIP promotion conversation initiated — qualifies as regulated industry >\$75K ACV. Exec sponsor: Tom Bradley (CISO).

Pinnacle Wealth

AT RISK

No QBR completed. CSM James Okoye sent 3 meeting requests over 6 weeks — no response. Seat utilization declining: 22/45 active (49%). Feature adoption at 31% — lowest in book. Last login by any user: Sept 3. Escalation recommended: executive outreach from VP CS. Contract expires March 31. Medium-high churn probability.

GoldLeaf Advisors

HEALTHY

First QBR (new customer Oct 1). Onboarding complete. 155/175 seats provisioned and active. Users very engaged — feature adoption 52% in first 30 days (above benchmark of 40%). CSAT 5/5. Referral conversation: they mentioned Pacific

Rim Capital as a warm intro opportunity.

Pacific Mutual Bank

HEALTHY

QBR held Sept 10. Solid quarter. 174/190 active seats. Contract auto-renewing Oct 1 at \$108K ARR. Expansion potential: compliance team requesting dedicated workspace feature — roadmap discussion ongoing. Exec sponsor: Angela Tan (CRO).

BlueSky Fintech

HEALTHY

QBR held Sept 20. New customer (Aug 1). 100% seat utilization (30/30 active) after only 60 days. Extremely high engagement. NPS: +70. Potential case study candidate — flagged for marketing.

NordBank AG

CHURNED

Post-churn analysis only. Contract expired June 9. BaFin fines (€12M) in Q1 triggered budget freeze across all non-critical vendor spend. CISO Dieter Hoffmann departed April 14 — no exec sponsor. Renewal conversation stalled without sponsor. Classified: PREVENTABLE with earlier exec escalation. Re-engagement possible in FY26 when budget resets. POC of record: procurement contact Heike Brandt.

Key Actions for Q4

- Meridian Trading: CRO to engage incoming CTO Li Wei before Nov 15. Offer 15% save discount + 2-year deal.
- Pinnacle Wealth: VP CS executive outreach by Oct 15. If no response by Oct 31, classify as probable churn.
- Apex Financial: Expansion proposal (970 seats, \$47K ACV) to be submitted by Wei Zhang by Oct 20.
- Castlepoint Insurance: RIIP promotion offer to be made at next touchpoint. Priya Nair to lead.
- NordBank AG: Mark for re-engagement outreach Q1 FY26. Keep Heike Brandt contact warm.
- GoldLeaf Advisors: Pacific Rim Capital intro to be requested by Sophie Laurent (referral potential \$144K ACV).