Client Success Hub

Sample Client Success Playbook

1. Onboarding Checklist Template

A step-by-step guide for onboarding new customers to ensure nothing falls through the cracks.

- Welcome email sent
- Kickoff meeting scheduled
- Product training sessions completed
- Initial success metrics defined
- Customer goals documented
- First check-in scheduled (e.g., after 30 days)

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2. Customer Health Scorecard Template

Track key indicators that signal account health and risk.

Metric	Threshold	Status (Green/Yellow/Red)	Notes
Product Usage	> 80% active days		
Support Tickets	< 2 in last 30 days		
NPS Score	> 8		
Payment Status	Current		

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3. Renewal Reminder Email Template

A professional yet friendly email to prompt customers about upcoming renewals.

Subject: Upcoming Renewal Reminder – [Product Name]

Client Success Hub

Hi [Customer Name],

I hope you're doing well! I wanted to remind you that your subscription with [Product Name] will renew on [Renewal Date]. If you have any questions or want to discuss your account, feel free to reach out.

Looking forward to continuing our partnership!

Best regards,
[Your Name]
[Your Contact Info]

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4. Quarterly Business Review (QBR) Agenda Template

Outline key discussion points for your client review meetings.

- Welcome and introductions
- Review of past quarter's goals and outcomes
- Customer feedback and satisfaction scores
- Usage and adoption metrics
- Upcoming product updates and roadmap
- Discussion of challenges and opportunities
- Next steps and action items

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5. Escalation Path Template

Clear steps on how and when to escalate customer issues internally.

- Step 1: Customer Success Manager attempts resolution
- Step 2: Escalate to Support Lead if unresolved after 24 hours
- Step 3: Escalate to Product Team if issue is product-related
- Step 4: Inform Customer Success Director for critical cases
- Step 5: Follow up with customer regularly until resolved