Bold Value Partners

EXECUTIVE RESEARCH BRIEFING / 2027

ARE YOUR BEST CUSTOMERS GROWING OR QUIETLY DRIFTING AWAY?

How Top Companies Turn Existing Customers Into Predictable, Profitable Growth.



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Retention as Growth Strategy ›

Where Value Quietly Leaks ›

Make Customer Growth Visible ›

Turning Insight Into Action ›

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THE RESEARCH PAPER / OCTOBER 2026

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THE QUICK READ

A 2027 research briefing on B2B customer retention, account growth, and net revenue retention for CEOs, Presidents, and customer-facing leaders.

- Many growing companies have added customers faster than they have built a process to keep and grow them.
- 73% of sales leaders now prioritize growth from existing customers (Gartner, 2025).
- Customer value leaks in everyday interactions and in relationships that rest on a single stakeholder.
- Top performers connect customer growth to their sales methodology, track each customer's stage in the CRM, and equip managers to coach accounts forward.
- For a $200 million company, a three-point retention gain plus modest expansion can add $8.6 million in revenue and $3.6 million in profit (illustrative).

Your teams are busier, but are they delivering greater customer value?

For most service and account organizations, the quarterly conversation with leadership sounds the same.

The team is busy. And yet no one can say with confidence which relationships are safe, which are quietly at risk, or where the next dollar of growth will come from within your existing customer base.

The revenue you already won is often the revenue you understand the least.

There is a reason for that. Many small and mid-sized companies have grown their customer base faster than they have built the process to keep and grow it. The way their teams onboard, engage, retain, and expand customers was either never formally established or has not been revisited since the company was much smaller. Retention and expansion depend on the individual effort of a few dedicated people, and leadership often learns about risk when a renewal is already in question.

Top-performing companies take a different path. They establish a practical customer growth process, connected to the same value-centric methodology their sales team uses yet built entirely for the work that happens after the sale. They track where each key customer stands, coach the capabilities that move customers forward, and forecast retention and expansion with the same confidence they expect from new sales.

This paper lays out six steps top-performing companies use to protect and grow the revenue already inside their customer base, with practical ideas your team can put to work this quarter.

If you lead the team: You don't need to run these six steps yourself. You need to inspect them. Bring the worksheet at the end of this paper to your next leadership meeting and ask the questions inside. The quality of the answers will show you where your retention and growth risk actually sits.

Why are existing customers now the growth plan?

Short answer: Existing customers produce roughly 70% of a mid-sized company's revenue, and 73% of sales leaders now prioritize growing them.

Growth leaders have reached the same conclusion, according to a 2025 Gartner survey of 243 chief sales officers and senior sales leaders.

WHERE GROWTH LEADERS ARE FOCUSED

73%

of sales leaders are prioritizing growth from existing customers.

57%

rank account retention and growth among their top three priorities.

80%

of value creation at the most successful growth companies comes from their core business.

Gartner survey of 243 CSOs and sales leaders, 2025. McKinsey, 2023.

The economics support that focus. About 80% of the value created by the world's most successful growth companies comes from their core business, largely by growing revenue from customers they already serve (McKinsey). As our briefing *The Growth Hidden Inside Your Business* notes, existing customers produce roughly 70% of a mid-sized company's revenue, depending on the industry.

What is the customer value gap?

Gartner identifies the central risk as a customer value gap: the distance between the value a supplier promises and the value its customers actually realize. Left unmanaged, that gap can reduce retention, advocacy, and growth.

The gap tends to open subtly. It shows up in onboarding that never confirmed what success looks like, in service interactions that resolve the issue without reinforcing the value, and in renewals that arrive without a clear summary of results. The research recommended response is a value path that guides customers from onboarding to full adoption, with every team describing the value the same way.

When customers cannot see the value they received, retention and renewal conversations tend to become price conversations.

KEY TERMS

- **Customer value gap:** The distance between the value a supplier promises and the value its customers actually realize (Gartner).
- **Net revenue retention:** The percentage of recurring revenue kept from existing customers, including expansion (McKinsey).
- **Post-sale customer lifecycle:** Four connected stages: Onboard with Impact, Engage and Optimize, Retain and Expand, and Activate Advocacy.
- **Full Value Gap™:** The connection between a customer's Current State, the measurable Immediate Results a solution delivers, and the Strategic Goals those results help achieve.
- **Stakeholder coverage:** The share of people who influence renewal and expansion that your team has a working relationship with.

The six steps that follow show how top-performing companies close that gap, from the leadership conversation down to the CRM.

STEP 1 OF 6

Why should leaders treat retention as a growth strategy, not a safety net?

Name the outcome first, then align the team to it.

Short answer: The relationships that renew contracts are the same ones that open the door to expansion and referrals, so treating retention as growth raises what the whole customer base can produce.

Most teams describe retention defensively, as the work of not losing customers. That framing caps the value of the function. The organizations that outperform tend to reframe it around growth, because the same relationship that renews contracts is usually the one that opens the door to expansion and referrals. When leadership treats the existing customer base as a growth portfolio rather than a maintenance cost, the priorities of the whole team shift.

McKinsey describes how leading companies start by defining the financial outcome they want, then prioritize the customer experience improvements that deliver it. They measure results in concrete terms such as share of wallet, repeat purchases, and net revenue retention, and they avoid the acquisition trap:

pouring energy into winning new customers while under-investing in the ones they already have.

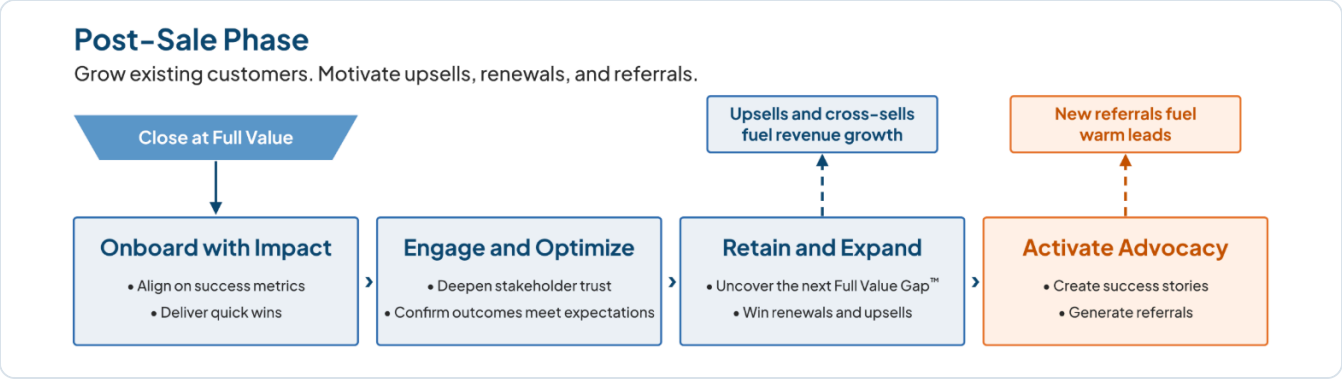
THREE OUTCOMES TO NAME IN DOLLARS

PROTECT
What core revenue must be protected this year, and which relationships carry the most of it?

EXPAND
Where can relationships deepen through additional services, tiers, or scope the customer would genuinely benefit from?

ADVOCATE
Which satisfied customers could become a repeatable source of warm introductions and references?

Those three outcomes are achieved across a post-sale lifecycle rather than in a single moment. Top performers manage four connected stages, each one building the value and trust that help the next stage succeed. The language and value-centric approach mirror the foundational method of what their sales team uses to win the business, so customers experience one consistent value language from the first conversation forward. A gap in any stage tends to show up later as churn, a stalled account, or a referral that never comes.



PUT IT TO WORK

- List your top 20 customers by annual revenue and note which stage each one is in today.
- Agree with your leadership team on the protect, expand, and advocate goals for the year, in dollars.
- Judge each development investment by whether it moves one of those three goals.

STEP 2 OF 6

Where does customer value leak in everyday interactions?

The day-to-day moments, not the crises, decide loyalty.

Short answer: Value leaks in ordinary moments: transactional interactions, missed risk signals, expertise that never translates, and relationships that rest on a single contact.

Leaders often assume customers leave because of a dramatic failure. The evidence points elsewhere. 96% of customers who have a high-effort service interaction become more disloyal, compared with 9% of those who have a low-effort experience, according to the research behind *The Effortless Experience* (CEB, now Gartner, 2013). The same research found service interactions are about four times more likely to drive disloyalty than loyalty.

Loyalty is usually lost in ordinary, friction-filled moments. A practical internal audit looks past satisfaction scores and asks where effort and missed value accumulate.

THREE PATTERNS WHERE VALUE LEAKS

REACTIVE, TRANSACTIONAL INTERACTIONS

The team answers the question and closes the ticket without reinforcing value or surfacing a need. The customer leaves satisfied but no more committed than before.

MISSED SIGNALS OF RISK AND OPPORTUNITY

Warning signs of a wavering relationship, or openings to expand it, pass unnoticed because no one has been taught what to listen for or what to do next.

EXPERTISE THAT NEVER TRANSLATES

Capable experts explain their work in technical terms instead of the outcome the customer wants, leaving the relationship exposed when a competitor tells a stronger story.

What happens when service enhances value?

Reducing effort protects the relationship. Helping customers see more value in what they bought grows it. When service interactions enhance the value a customer sees, Gartner found the following:

37%
likely to stay after a high-effort experience.

82%
likely to stay when service enhances value.

85%
wallet share when service enhances value.

97%
likely to spread positive word of mouth.

Gartner customer service research, August 2020.

The difference between resolving an issue and enhancing perceived value is a coachable skill, and it maps directly to renewals, expansion, and referrals.

PUT IT TO WORK

- Review ten recent interactions with key customers. Mark each one as resolved only, or resolved with value reinforced.
- Ask your team to name the warning signs they see most often, such as a new executive, fewer orders, or slower responses.
- Rewrite one common technical explanation in terms of the business outcome the customer is trying to reach.

Are your customer teams connected to every stakeholder?

Short answer: Often not. Many account teams stay close to one day-to-day contact while the executives who decide on renewal, budget, and expansion rarely hear from them.

This is the frustration leaders raise most. Account teams build strong relationships with the person who calls with questions and approves the routine work. Meanwhile, the leaders who own the customer's strategic goals never see the results the team delivered.

Bold Value Partners finds that complex B2B decisions typically involve four to thirteen stakeholders. When the relationship rests on one contact, three risks follow:

A NEW EXECUTIVE ARRIVES

A new leader reviews every vendor and has no history with your team.

YOUR CONTACT MOVES ON

Your contact leaves or changes roles, and the relationship leaves with them.

RESULTS STAY INVISIBLE

The leaders who own the strategic goals never see your results, so the next opportunity goes to whoever reaches them first.

That last risk matters most for growth. Expansion begins by uncovering the next Full Value Gap™: connecting the customer's Current State to measurable Immediate Results and the Strategic Goals those results help achieve. Customer teams can only uncover it when they understand what each stakeholder is accountable for. A competitor who reaches the new CFO first can define that gap on their terms.

> **Customer teams that understand every stakeholder's goals are positioned to uncover the next Full Value Gap™ before a competitor does.**

Top performers treat stakeholder coverage as part of every key account plan. They map each stakeholder's role, influence, and goals, strengthen a relationship with each one, and review coverage in each account review.

PUT IT TO WORK

- For each top-20 account, list every stakeholder who influences renewal or expansion, and mark which ones your team has met this year.
- Flag any account where the relationship rests on a single contact.
- Share a results summary with at least one executive stakeholder in each key account this quarter.

STEP 3 OF 6

How do you build confidence in people who don't see themselves as value-sellers?

Frame it as elevating the experience, and design it to stick.

Short answer: Frame the skills as elevating the customer experience, then make them stick through a reinforcement loop of learning, practice, application, and manager coaching.

The professionals who hold your customer relationships are often experts, advisors, and problem-solvers who take pride in not being salespeople. Push a traditional sales program on them and it is likely to be rejected on contact. The work of reinforcing and promoting your value to customers still needs to happen, so the framing and the design both matter.

The framing is straightforward. These are experience and relationship skills: listening well, recognizing what a customer is trying to accomplish, identifying every stakeholder, communicating value in the customer's language, and recognizing when a moment calls for a growth conversation instead of a quick close of the service ticket. Framed this way, the same capability that protects a relationship also makes the person better at the job they already enjoy.

The design determines whether any of it lasts. Training delivered as a one-time event fades quickly. What tends to make skills stick is a reinforcement loop built into the flow of work.

A REINFORCEMENT LOOP THAT MAKES SKILLS STICK

LEARN
Short, practical lessons built around real customer situations.

PRACTICE
Rehearse with peers before the conversation counts.

APPLY
Use the skill with live accounts already on the calendar.

REINFORCE
Manager check-ins keep the skill growing in the flow of work.

Each cycle starts again with the next priority skill.

Content is rarely the problem. Reinforcement is. A modest amount of formal instruction, wrapped in ongoing application and manager coaching, outperforms an expensive event that everyone enjoys and no one applies.

PUT IT TO WORK

- Name the program for what it means to your team: elevating the customer experience.
- Pick one priority skill per quarter and tie it to a live account conversation already scheduled.
- Pair team members to practice before important customer meetings.

STEP 4 OF 6

Why does customer growth stall after the training ends?

The manager is the multiplier, or the point of failure.

Short answer: Customer growth stalls when managers step in to solve customer problems themselves instead of coaching the capability behind them.

In many growing organizations, frontline managers are promoted for being exceptional at the work, without being prepared to develop people. They are stretched thin, wearing several hats, with little time set aside for coaching. When a team member hits a difficult customer situation, such as an unexpected retention risk or an expansion opportunity, the instinct is to step in and handle it. That solves today's problem and skips the development that would prevent tomorrow's.

This is the step where customer growth programs most often stall. The training lands, energy is high, and then reinforcement never comes because the manager was never equipped to lead it. Turning managers from expert doers into coaches is what makes the first three steps compound.

EXPERT DOER

Steps in to rescue the account.
Answers the question for the team.
The team's capability stays the same.

→

GROWTH COACH

Asks what the customer needs to see next.
Coaches the capability behind the stall.
The team's capability grows each month.

The research supports the investment. Quality coaching can lift the performance of the middle 60% of a sales team by up to 19% (Harvard Business Review). Coaching also helps keep your best people: when organizations make their service reps a priority, rep intent to leave fell by 25% and productivity rose by 19% (Gartner).

Equipping a manager to coach does not require a heavy program. It requires a short set of coaching prompts tied to the skills the team just learned, a light cadence of check-ins built into existing meetings, and a simple way to recognize the behaviors that protect and grow relationships.

PUT IT TO WORK

- Add a short coaching segment to one existing team meeting each week.
- Before stepping in on a customer issue, ask the team member what they would do next and why.
- Recognize one behavior each week that protected or grew a customer relationship.

STEP 5 OF 6

How do top companies make customer growth visible in the CRM?

Track each key customer's stage so leaders can forecast and managers can coach.

Short answer: They give each key customer a stage in the CRM, define what the customer confirms to complete it, and review stage movement with each account owner every month.

Many companies can tell you where each new sales opportunity stands. Far fewer can say where each existing customer stands, even though those customers produce most of the revenue. Top performers close that gap by tracking customer growth in the CRM they already use, such as HubSpot, Salesforce, or Microsoft Dynamics, the same way they track new business.

Each key customer carries a stage: Onboard with Impact, Engage and Optimize, Retain and Expand, or Activate Advocacy. Each stage has clear completion criteria, defined as accomplishments the customer confirms, such as agreeing on success metrics during onboarding or confirming that outcomes meet expectations. When a customer meets the criteria, the account advances. When it stalls, the reason is visible.

WHAT A CUSTOMER GROWTH REVIEW CAN LOOK LIKE

Customer Growth Review | Key Accounts

Account	Annual revenue	Stage	Status	Next growth step
Lakeshore Components	$4.8M	Retain and Expand	Expanding	Present results review and second-site proposal
Meridian Health Group	$3.1M	Engage and Optimize	At Risk	Meet new CFO and confirm outcomes before renewal
Harbor Logistics	$2.6M	Retain and Expand	Secure	Uncover the next Full Value Gap™
Summit Foods	$1.9M	Onboard with Impact	Secure	Deliver first quick win by quarter end
Northgate Advisors	$1.4M	Activate Advocacy	Expanding	Request a referral and success story

Illustrative example. Account names are hypothetical.

What changes when managers review customers by stage?

When managers review the customer list with stages in view, the conversation changes. They spend less time collecting general updates and more time asking what is needed to advance each account and which capability will get it there, including how many stakeholders the team reaches in each account.

WHAT THE PRESIDENT OR CEO GETS

A retention and expansion forecast built on where each customer actually stands, with large renewals and revenue concentration visible months in advance.

WHAT THE CUSTOMER LEADER GETS

A clear coaching focus. A stall in Onboard with Impact calls for different coaching than a stall in Retain and Expand.

PUT IT TO WORK

- Add a customer growth stage field to each key account record in your CRM.
- Define what the customer must confirm to complete each stage.
- Review your top 20 accounts by stage once a month with each account owner.

STEP 6 OF 6

How do you measure the value at stake like a CFO?

Tie every result back to retention, expansion, and advocacy.

Short answer: Measure the value protected and the value grown: retention, effort, expansion, and advocacy, with leading indicators reviewed monthly and results reviewed quarterly.

A customer growth program keeps leadership support only if it can show its impact in terms the business already tracks. That means moving past activity measures, such as hours of training delivered, toward the outcomes leadership cares about across the full customer relationship.

VALUE PROTECTED

Retention. Renewal of the core customer base, especially the relationships that carry the most revenue.
Effort. Less effort and escalation in everyday interactions, an early indicator of loyalty and lower cost to serve.

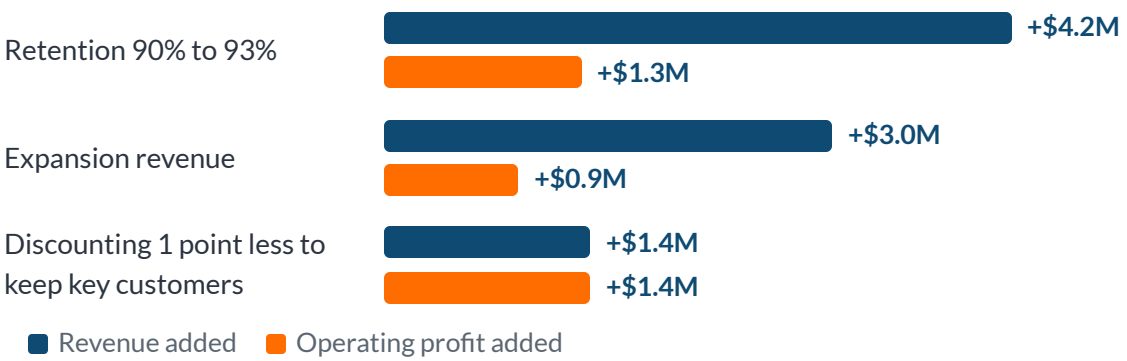
VALUE GROWN

Expansion. Additional services, tiers, or scope the customer values.
Advocacy. Warm referrals and references from satisfied customers, the lowest-cost source of new opportunity.

What are a few points of retention worth?

Consider Northfield Industrial, the composite mid-sized company from *The Growth Hidden Inside Your Business*. Northfield generates $140 million of its $200 million in annual revenue from existing customers and keeps 90% of that customer revenue each year. With a connected customer growth process, three modest changes add up quickly.

CONNECTED CUSTOMER GROWTH ADDS $8.6 MILLION IN REVENUE AND $3.6 MILLION IN PROFIT



Northfield Industrial is a composite drawn from patterns across Bold Value Partners client work. Figures are hypothetical, annual, before implementation costs, and rounded. Operating profit rises by about 30 cents for each dollar of revenue kept or grown, plus each dollar of discount avoided.

Retention economics compound over time. A 5% increase in customer retention can raise profits by 25% to 95%, depending on the industry (Bain & Company).

Which indicators should leaders track?

Track the leading indicators monthly: coaching cadence, movement through the stages, and the share of interactions that reinforce value. Track the lagging results quarterly: retention, net revenue retention, expansion, and referrals. That rhythm turns a development investment into a growth plan leadership can forecast against.

How do the six steps work together?

Retention and growth stop depending on hope when they become a process the whole team owns. Name the outcome. Audit where value leaks, including relationships that rest on one contact. Build confidence in your people in a way they will accept. Equip managers to coach it forward. Make customer growth visible. Measure what is truly at stake. Each step reinforces the next.

TOOLS TO PUT THIS TO WORK

FOR MANAGERS

Customer Growth Review Checklist

Review each key account's stage, risk signals, and next growth step so your retention and expansion forecast holds up.

FOR ACCOUNT TEAMS

Key Account Growth Plan

Know which key accounts are secure, which are at risk, and where your next dollar of growth will come from.

FOR LEADERSHIP

Customer Growth Scorecard

Assess how well your team retains, expands accounts, and deepens relationships with every stakeholder.

Find these tools on the Bold Ideas page at BoldValuePartners.com.

Turn this into a plan for your team

In a short working session, we can pressure-test where your retention and growth risk sits today and identify the one or two capabilities that would move it most. You will leave with a clear read on your own numbers, whether or not we ever work together.

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About the author: Walt Melcher is CEO of Bold Value Partners, creator of the Bold Value Method™, and author of the forthcoming book *Bold Value Selling*. His perspective draws on 35 years of experience, more than 3,000 customer meetings, and over 40,000 sales calls.

Your Customer Growth Readiness Worksheet

Take fifteen minutes to answer honestly. If the answers reveal more gaps than you expected, that is the finding, and it is the starting point. Type your answers into each box.

1. Define the Outcome (Step 1)

Which customers bring in the revenue you cannot afford to lose this year? Do you know which ones they are, and do you have a clear plan you follow to keep them? Where could you sell more, or ask a happy customer to refer you to someone new?

2. Revenue Concentration (Step 1)

How much of your revenue comes from your biggest customers? If one or two of them left this year, how much would that cost you?

3. Where Value Leaks (Step 2)

Where do daily or scheduled interactions turn transactional? Where do they miss a signal of retention risk or an opportunity to grow that customer? Name the most common pattern you see. Which key accounts rest on a single relationship?

4. Team Confidence (Step 3)

How confident is your team in customer-facing moments that call for more than just responding to customer questions? Where can they improve?

5. Manager Coaching (Step 4)

How often do your managers actually coach these skills today, rather than stepping in and handling the situation themselves? What skills and tools do they need to be better coaches?

6. Visibility and Measurement (Steps 5 and 6)

Can you see each key customer's stage in your CRM today? Which retention, expansion, and advocacy results matter most to your business, how do you track them each quarter, and which leading activities would tell you early that it is working?

7. Your Total Opportunity

Add the annual value of the relationships you most need to protect to the value of the expansion and referrals you believe are within reach. That figure is the size of the growth opportunity a customer growth process is built to unlock.

Frequently asked questions

What is a customer growth process?

The defined way a company onboards, engages, retains, and expands existing customers, connected to its sales methodology and tracked in the CRM.

Who should own customer retention and expansion?

Account owners own each relationship, the customer-facing leader owns the process and forecast, and the CEO or President inspects results quarterly.

How do non-salespeople help expand accounts?

By elevating the customer experience: confirming results, connecting with every stakeholder, and recognizing when a customer's goals call for a growth conversation.

How do you track customer growth stages in a CRM?

Add a stage field to each key account in HubSpot, Salesforce, or another CRM, then review stage movement with account owners monthly.

How soon do results show up?

Leading indicators move within the first month. Retention and expansion results build across renewal cycles.

Research Sources & Notes

Studies differ in population, year, and method; figures are directional, and illustrative financial examples are not observed customer results.

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Make Your Growth More Predictable. Profitable. Repeatable.

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