CUSTOMER GROWTH PORTFOLIO

See where your existing revenue is secure, at risk, and positioned to grow.

> **Turn your most important customer relationships into a one-page executive view of retention risk, revenue concentration, stakeholder coverage, and the next growth move.**

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WALT MELCHER | BOLD VALUE PARTNERS

Example: Northfield Industrial's top 10 customers

A composite company. Names and figures are hypothetical.

$47.9M
Revenue in this portfolio

$15.0M
Revenue at risk (31%)

$5.0M
Expansion potential

4
Accounts on a single contact

43%
Revenue in top 3 accounts

Customer	Annual revenue	Stage	Status	Stakeholder coverage	Customer can state value received	Expansion potential	Next growth move	Exec attention
Lakeshore Components	$8.2M	Retain and Expand	Expanding	Broad	Yes	$1.5M	Present results review; propose second site	
Meridian Health Group	$6.4M	Engage and Optimize	At Risk	Single contact	Partly	$0	Meet new CFO; confirm outcomes before renewal	✓
Harbor Logistics	$5.9M	Retain and Expand	Secure	A few	Yes	$0.8M	Explore new service line with operations VP	
Cedar Ridge Manufacturing	$5.1M	Retain and Expand	At Risk	Single contact	Partly	$0	Executive sponsor call; close open service issues	✓
Summit Foods	$4.6M	Onboard with Impact	Secure	A few	Partly	$0.4M	Confirm success metrics; deliver first quick win	
Northgate Advisors	$4.2M	Activate Advocacy	Expanding	Broad	Yes	$0.6M	Ask for a referral and a success story	
Pinecrest Packaging	$3.8M	Engage and Optimize	Secure	A few	Yes	$0.5M	Quarterly results review with plant leadership	
Riverbend Equipment	$3.5M	Engage and Optimize	At Risk	Single contact	No	$0	Rebuild relationship after main contact left	✓
Westfield Controls	$3.3M	Retain and Expand	Expanding	Broad	Yes	$0.9M	Scope an added service tier	
Granite Bay Supply	$2.9M	Onboard with Impact	Secure	Single contact	Partly	$0.3M	Build relationships beyond purchasing	

What this view tells Northfield's CEO: nearly a third of top-customer revenue is at risk, all three at-risk accounts rest on one relationship, and $5.0M of expansion is in reach if the team acts on it.

Build your Customer Growth Portfolio

Have your customer leader complete it, then review it together.

Revenue in this portfolio	Revenue at risk	Expansion potential	Accounts on a single contact	Accounts needing exec attention

Customer	Annual revenue ($M)	Stage	Status	Stakeholder coverage	Customer can state value received	Expansion potential ($M)	Next growth move	Exec attention
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Totals calculate in Adobe Acrobat or Acrobat Reader. Enter revenue in millions (for example, 4.5). Choose stage, status, coverage, and value received from each dropdown.

Customer Growth Leadership Scorecard

Your portfolio shows where revenue stands. This check shows why. Rate your team, not individual accounts, and compare ratings across leaders.

	THE STEP	WHAT GOOD LOOKS LIKE	RATING
1	**Treat retention as a growth strategy.** Name what core revenue to protect, where to expand, and who could advocate.	Your team has protect, expand, and advocate goals in dollars for its key customers.	☐ R ☐ Y ☐ G
2	**Find where value leaks.** Look past satisfaction scores to everyday interactions and single-contact relationships.	Your team confirms results with customers, reaches every stakeholder who influences renewal, and catches risk signals early.	☐ R ☐ Y ☐ G
3	**Build confidence in people who don't see themselves as value-sellers.** Frame the skills as elevating the customer experience, and reinforce them.	Customer-facing people recognize growth moments and lead those conversations with confidence.	☐ R ☐ Y ☐ G
4	**Coach after the training ends.** Turn managers from expert doers into coaches who build capability.	Managers coach on live accounts each week and ask before they step in.	☐ R ☐ Y ☐ G
5	**Make customer growth visible.** Track each key customer's stage in the CRM and review it on a set rhythm.	Each key customer's stage and status is current in the CRM and reviewed monthly.	☐ R ☐ Y ☐ G
6	**Measure the value at stake like a CFO.** Report the value protected and the value grown, in terms the business tracks.	Leadership sees retention, expansion, and referral results each quarter and leading indicators each month.	☐ R ☐ Y ☐ G

Rating key: Red = absent or unreliable Yellow = partial or inconsistent Green = consistent

Your priority step for the next 30 days
Pick the red or yellow step behind the most revenue at risk in your portfolio.

Schedule Walt Melcher, CEO, Bold Value Partners, as a guest speaker at your next leadership meeting:
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