Customer Growth Review Checklist

Five questions to answer for every key customer

1. **What does this customer need to see from us before renewal?**
   Keeps the focus on proof of value. ☐ Confirmed
2. **Who else influences renewal or expansion, and when did we last meet them?**
   Surfaces single-contact risk early. ☐ Confirmed
3. **When did the customer last see the results we delivered?**
   A results summary every 90 days keeps value visible. ☐ Confirmed
4. **Have we confirmed the customer's goals and how our solution can support them?**
   Use the research prompt below if no one knows. ☐ Confirmed
5. **What is the most important action we should take next?**
   Turn what you learned into a clear action plan. ☐ Confirmed

Warning signs to watch for

Check any you see and note your next best action

	SIGNAL	NEXT BEST ACTION
☐	A new executive or decision-maker arrived	
☐	Our main contact is changing roles or leaving	
☐	Not all stakeholders who influence upsells/renewals have been engaged	
☐	Orders, usage, or scope are declining	
☐	Responses are slower or meetings get canceled	
☐	Service issues or escalations are still open	
☐	Budget cuts or a reorganization were announced	
☐	A competitor or new bid has been mentioned	
☐	Renewal is near and no customer review is scheduled	

Know their goals in five minutes

Paste this into your AI tool before your next customer meeting and confirm with your customer:

> *"Research [Customer Company]. Summarize its stated goals, priorities, and challenges for this year using its website, annual report, press releases, leadership interviews or LinkedIn posts, and recent job postings. List each goal with its source and date. Then offer three ways my company may be able to help them achieve their goals."*

Want your customer-facing teams to lead these conversations with confidence? Explore the Bold Value Customer Growth program →