

RENEWAL RISK

ASSESSMENT

Run this months before the renewal date, not the quarter of it. By the time renewal risk shows up in a number, the customer usually decided a long time ago — this assessment is built to catch the decision forming, while there's still time to change it.

"A cure notice gives you a countdown and a deadline. Most customers give you neither. They give you silence, and a renewal that was decided long before you knew it was in question."

ACCOUNT

Customer

Renewal date

Executive whose confidence decides the outcome

Assessed by / date

SECTION 1 — THE FOUR NON-NEGOTIABLES

Run your account through this honestly. Mark each one yes or no. No maybes.

- ☐ Ownership — you can name the one person accountable for aligning promise, expectation, and execution across this account, from the first sales conversation through renewal. Not a function. A person.
- ☐ Shared definition of success — there is a written definition of success, in the customer's own words, that Sales, Delivery, and Leadership all measure against. Each of them could recite it without opening the contract.
- ☐ Confidence measured — customer confidence is tracked separately from SLA performance, and read first in reviews, not as a footnote after the SLA slide.
- ☐ Leadership commitment — when leaders make a call on this account, they weigh it against the customer's definition of success, not against whichever department is loudest in the room.

Four yeses means the laws have ground to stand on. Any no is where an account starts to drift, long before anything shows up in a report.

SECTION 2 – BEHAVIORAL WARNING SIGNS

These are quiet signals a customer is routing around your process because they've stopped trusting the operating model – not your people. Check every one present on this account right now.

- ⚠ *Direct texts or calls to specific individuals, bypassing the account team or normal channel.*
- ⚠ *A private spreadsheet or shadow tracker the customer built off to the side.*
- ⚠ *Requests for updates that route around your normal process.*
- ⚠ *Side conversations happening in channels you're not part of.*
- ⚠ *Your reports get politely ignored rather than referenced in reviews.*
- ⚠ *Engagement is cooling – fewer questions, more workarounds, shorter and more transactional exchanges.*

Zero checked is a good sign. Two or more is the customer already telling you something the dashboard hasn't caught up to yet.

SECTION 3 – THE DEFERRED-ISSUE CHECK

"Let's wait until after this renewal" is a bet that nothing important is happening in the months you've decided to ignore. Something almost always is.

Is there anything about this relationship the team has agreed to address only after this renewal?

If confidence is already slipping here, will there be a renewal left to fix it after?

SECTION 4 – SUCCESS QUESTION FRESHNESS

Success changes. An answer from two years ago can be quietly wrong today.

When was the signing executive last asked directly what success looks like for them?

- ☐ Within the last 12 months
- ☐ Over 12 months ago
- ☐ Never asked directly

Risk classification

Count: non-negotiables answered “no,” behavioral warning signs checked, and whether the success question is stale or unasked. Then classify honestly.

LOW RISK	4/4 non-negotiables yes, zero or one warning sign, success question asked within 12 months. Protect this account like it's the most valuable thing you own — it is.
EMERGING RISK	One non-negotiable is a no, or two to three warning signs present, or the success question is stale. This is a seam, not a crisis yet — close it this quarter, not next.
HIGH RISK	Two or more non-negotiables are no, or four or more warning signs present, or the success question has never been asked. This renewal is likely already decided. Escalate now.

This account's classification

Preventable or not?

Some losses aren't yours to prevent — an acquisition, a strategy shift, a decision that genuinely makes more sense for them. Those don't belong on this list. The ones that hurt are the accounts you could have kept, where confidence eroded for months while every report said the relationship was fine.

Is this risk preventable, or outside your control? Note why.

Action plan

What is the one conversation, this week, that starts closing the highest-risk item above?

Who owns that conversation?

Next review date for this assessment

Want a second set of eyes on where this is heading? Book an Outcome Execution Gap Session — we'll map it on your real accounts together.

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