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The Customer Health Score.

An instrument: four components, three colors, one rule. How much does this account resemble a successful customer at its stage — and which play does the answer name. The manual, and the scorecard that is the instrument.

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CONTROL

Healthy customers are successful.

The Voice of the Customer says what the customer tells us. This instrument says what the customer *shows* us: a classification of how successful the relationship is, from a minimum viable set of data, in three colors that a whole company can read. Customer Success uses it as an early warning system; the rest of the company uses it to prioritize, decide and forecast without asking the account owner "what's happening?"

VERSION	DATE	AUTHORITY	NOTES
1.1	October 2026	Juan Carlos González II	First public edition, rebuilt as a Juan.co instrument from the team presentation and the hour-long lesson plan: the fail-to-Red rule and the stage exemplar written out; the four plays named as the Operating Model names them; the scorecard workbook built with example thresholds and an invented book
1.0	2018	Juan Carlos González II	Devised as Senior Director of Customer Success at a hospitality-software company in the Vista Equity portfolio: the team-wide presentation "Customer Health — Measuring a Customer's Success" and the lesson plan for teaching it in an hour

HOW TO USE THIS INSTRUMENT

Read pages 4–5 for what health is and the one rule. Pages 6–9 are the instrument: the four components, the stage profiles, the thresholds and the scorecard. Pages 10–12 are what to do with the answer. Page 13 teaches it in an hour; page 14 stands it up. Then open the workbook: set the Profiles tab from your own Green customers, and score the book.

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I · WHY

What health is.

Customer Health is a classification of how successful the relationship with a customer is, based on multiple data metrics. The company uses it to speed up and scale communication, prioritization, decision-making and forecasting. Customer Success uses it as an early warning system.

BASE DEFINITION

Adopting, and well served

The customer is adopting — through product usage and systems utilization — and receiving high operational performance from our teams.

EXPANDED DEFINITION

Receiving value, likely to renew

The customer is receiving value from a maturing partnership and is likely to renew. At the end of the day, health = success: a successful customer is a healthy customer, and a healthy customer is on the path to renewal and growth.

WHAT IT IS FOR

Prioritization, at scale

Not every account can be prioritized on strategy alone. Health is visible everywhere — the CRM, the success platform — so that when someone looks at the owner of an account and asks "what's happening?", the answer is already there, in one color.

Actionable, and consolidated

Two tests for any health score. **Consolidated**: it represents enough factors to describe the whole picture — adoption, outcomes, operations and feedback — rather than one proxy dressed up as a verdict. **Actionable**: every state names a move, and every failed input names a play; a score that cannot tell a CSM what to do on Tuesday is a report, not an instrument. The score is also a **minimum viable** set of inputs on purpose. A dozen weighted signals look rigorous and are argued with; four signals, each of which can fail, are trusted.

The signs we see

On the shelf this instrument is the first of three ways a Customer Success organization reads its customers. The Voice of the Customer is what they *tell* us, asked properly. The Customer Health Score is what they *show* us, scored against what a successful customer looks like. The Business Review is what we *agree* together, in the room. Health is the one that runs every day without anyone asking.

> THE CLAIM THIS INSTRUMENT RESTS ON
>
> Customer Health is most predictive in the first ninety days after onboarding. Most churn originates in the onboarding and post-onboarding stages, which is why the instrument scores by stage, why the Hypercare profile is the tightest, and why a Hypercare account that is not Green gets its play this week and not this quarter. If you take one thing from the manual, take that.

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I · WHY

Three colors, one rule.

Each of the four components scores Green, Yellow or Red against the thresholds for the account's stage. The account's color follows one rule, and the rule is deliberately unforgiving: **any component in a fail state makes the account Red**, and names the play that answers it.

COLOR	WHAT IT MEANS	WHAT TO DO
Green · Doing well	On track to renew. Adopting, meeting its objectives, served cleanly, and saying so.	**Keep doing what you are doing: standard nurturing, the proactive plays on their cadence, and the next business review on time.**
Yellow · Take notice	On track to renew, with flags that need to be addressed. Left unchecked, this customer will churn.	Name the flag, decide the action that gets the account back to Green, and put a date on it. Yellow is a question with a deadline, not a state to live in.
Red · Requires attention	On track to churn. If the customer continues this way they will not renew.	**Run the play the failed component names, this week. Define the get-well plan with the customer and execute it. Sometimes the cause is beyond your control — an economic downturn, a segment going out of business — and there is still value in showing up to help them save theirs.**

WHY FAIL-TO-RED

No averaging away a failure

A weighted score lets three good signals hide one bad one, and the bad one is the churn. An open critical case, a customer who has stopped logging in, a detractor — each is a fact about the renewal on its own, and the instrument says so.

THEN WHY A NUMBER AT ALL

Resemblance, for trend

Beside the color the scorecard computes a 0–100 resemblance to the stage's Green exemplar, from the stage's weights. It never overrides the color. It exists so a Yellow account drifting from 80 to 55 is visible before it fails, and so a book can be ranked.

OVER TIME

Red is not perpetual

Health is dynamic and evolving. We do not know that Red stays Red — the plays exist precisely because it need not — and as partnerships mature the definitions change. What makes an account healthy is universal; the thresholds are the only thing you tune.

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II · THE INSTRUMENT

The four components.

Four data points, each from a different source, each asking one question of the account. Together they are the minimum that describes the whole picture; remove any one and the score has a blind spot a customer can churn through.

COMPONENT	THE QUESTION	THE SIGNAL	SOURCE	EXAMPLE THRESHOLD
Adoption	Is the customer using what they bought?	Engagement and usage frequency; the key user actions that indicate the service is in use.	The application	Opened the daily digest or logged in within the past seven days
Business outcomes	Are they getting the results they bought it for?	The CSM's rating from the last business review — meeting its objectives, partly, or not — and whether a review is due.	The CSM; the Business Review	Rated 3 of 3 at a review inside the stage's window
Customer operations	What is it like to be served by us?	Open cases, highest severity, oldest case; onboarding against its plan; billing or invoicing outstanding.	Support, onboarding, finance	No open critical; cases and aging under the stage's limits; nothing past due
Feedback	What are they saying about us?	The relational survey — Net Promoter Score every six months — and anything consolidated and actionable that the extended customer team says.	The Voice of the Customer	A promoter, surveyed within six months

ADOPTION

The product tells you

- No human has to enter it
- Leading: it moves before the renewal does
- Daily; the window is days, not months

OUTCOMES

The CSM tells you

- The one subjective input, and the most important
- Comes from the review, so it is at most a quarter old
- No review is itself a flag

OPERATIONS

The queue tells you

- Severity matters more than count
- Aging is the tell: 7–30 days
- Billing is health too — an unpaid invoice is a vote

FEEDBACK

The customer tells you

- Relational, not transactional
- Stale is a flag; a detractor is a fail
- Every response gets a follow-up

Two of the four — outcomes and feedback — are also the inputs to other instruments on this shelf, which is the point: the health score is where the Business Review and the Voice of the Customer land, every day, on one row per account.

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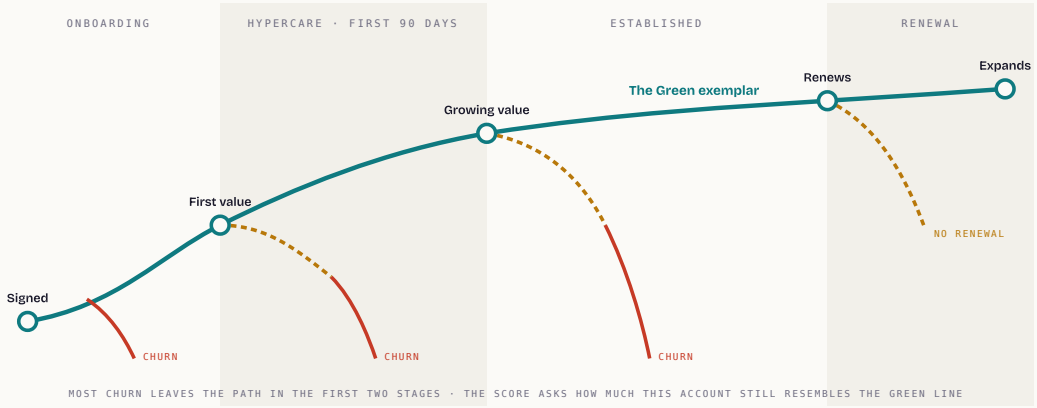
II · THE INSTRUMENT

Stage profiles and the exemplar.

Not all customers are measured equally. A customer at each stage of the journey is modeling the behavior that leads to a renewal, an expansion, or a churn — and that behavior can be scored. So the instrument keeps a separate scorecard per stage, and the question it asks is always the same: *how much does this customer, now, resemble a Green customer at this stage?*



STAGE 1
Onboarding
Signature to first value; the implementation is open. Adoption is not expected yet; the onboarding plan and the case queue carry the score.

STAGE 2
Hypercare
The first ninety days after first value. Most churn originates here and in onboarding; the thresholds are tightest, adoption weighs most. Not Green means the play this week.

STAGE 3
Established
Steady state. Adoption and outcomes weigh equally; the review is due quarterly; the survey every six months.

STAGE 4
Renewal
Within 120 days of renewal. Outcomes weigh most: can the customer say what they got?

The exemplar

A company generally knows what a good customer from its own pool looks like. At each stage, take the accounts that renewed and grew — the ones everyone would call Green — and read their numbers at that stage: how often they logged in, how many cases they carried, how fast onboarding ran, what they scored on the survey. Those numbers are the thresholds. The score for any account is then its resemblance to that archetype, not to an industry benchmark; a benchmark describes someone else's customers. **Segment by type too where behavior differs** — keep a column for it — but start with stage, because stage is where the churn is.

HYPERCARE IS A TOUCH, NOT A TIER

Hypercare is the proper application of touch for the onboarding and post-onboarding period, whatever the account's tier: the dedicated attention that keeps a new customer Green and on track for growth while the behavior that predicts the renewal is being formed. A digital-tier account in Hypercare still gets a human when it goes Yellow; after ninety days it returns to the touch its tier earns.

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II · THE INSTRUMENT

The thresholds.

The workbook's Profiles tab, as shipped: an example starting point, one row per stage. Every number is blue — replace it with what your own Green customers show. The weights sum to 100 and feed resemblance only; the colors come from the thresholds alone.

SIGNAL	ONBOARDING	HYPERCARE	ESTABLISHED	RENEWAL
Adoption · Green if engaged within	14 days	7 days	7 days	7 days
Adoption · Yellow if within, else Red	30 days	14 days	14 days	14 days
Outcomes · review due every	—	30 days	90 days	60 days
Operations · open cases Yellow / Red at	4 / 8	3 / 6	4 / 8	3 / 6
Operations · oldest case Yellow / Red at	10 / 21 days	7 / 14 days	10 / 21 days	7 / 14 days
Operations · open critical	Red	Red	Red	Red
Billing · outstanding Yellow / Red at	30 / 60 days	30 / 60 days	30 / 60 days	15 / 30 days
Onboarding · past plan Yellow / Red at	7 / 21 days	—	—	—
Feedback · survey stale at	not yet surveyed	not yet surveyed	6 months	6 months
Feedback · detractor (0–6) / passive (7–8)	Red / Yellow	Red / Yellow	Red / Yellow	Red / Yellow
Weights · adoption / outcomes / operations / feedback	20 · 15 · 45 · 20	40 · 20 · 30 · 10	30 · 30 · 20 · 20	20 · 40 · 15 · 25

READING THE TABLE

Why Hypercare is tight

Seven days of silence from a customer in its first ninety is a different fact from seven days of silence from a customer in its fifth year. The thresholds say so; the weights say that in Hypercare, adoption is most of the story.

READING THE TABLE

Why Onboarding is loose

Nobody logs in to a system that is not live. During onboarding the score is carried by the plan — days past it — and by the case queue; adoption and feedback are suspended rather than scored as failures.

SETTING YOUR OWN

From the Green pool

Take last year's renewed-and-grown accounts. For each stage, their median is Green; their worst quartile is the Yellow line; past that is Red. Revisit every two quarters: as the partnerships mature, the exemplar moves.

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II · THE INSTRUMENT

The scorecard.

One row per account; type only the blue cells. The colors, the health, the resemblance and the play due are computed against the account's stage. Eight rows of the invented book that ships in the workbook, so you can see the rule work.

ACCOUNT	STAGE	ENGAGED	OUTCOME	CASES	SURVEY	A	O	OP	F	HEALTH	RES.	PLAY DUE
Harbor & Vine	Established	3 d	3 · 40 d	1 · N · 4 d	9 · 2 mo	G	G	G	G	Green	100	—
Dockside Fish Fry	Hypercare	1 d	3 · 15 d	1 · N · 1 d	9 · 1 mo	G	G	G	G	Green	100	—
The Copper Kettle	Hypercare	12 d	none	3 · H · 9 d	—	Y	Y	Y	G	Yellow	55	Adoption Workshop · now
Lakeside Grill	Established	5 d	3 · 100 d	1 · N · 2 d	8 · 1 mo	G	Y	G	Y	Yellow	75	Business Review
Fieldhouse	Established	4 d	3 · 30 d	0 · bill 45 d	9 · 1 mo	G	G	Y	G	Yellow	90	Success Initiative
Mesa Taqueria	Onboarding	—	9 d past plan	2 · N · 6 d	—	G	Y	G	G	Yellow	93	Success Initiative
Bluebird Café	Established	21 d	2 · 95 d	1 · N · 2 d	7 · 4 mo	R	Y	G	Y	Red	45	Adoption Workshop
Union Street	Renewal	6 d	1 · 25 d	1 · C · 2 d	—	G	R	R	Y	Red	33	Success Initiative

READ THE ROWS

The rule at work

Bluebird is Red on one fact — twenty-one days of silence — however the other three look. Union Street fails twice; the open critical names the play. Fieldhouse is Green but for the invoice: an unpaid bill is a vote. Copper Kettle is only Yellow, but in Hypercare, so flagged.

RESEMBLANCE

The number beside the color

Each component earns its stage weight: Green the full weight, Yellow half, Red none. Mesa at 93 is nearly Green; Copper Kettle at 55 is halfway to Red. Same color, different urgency.

THE BOOK TAB

The team's view

Counts by color and stage, resemblance per stage, plays due with how many are Red or Hypercare, and the Hypercare watch — next year's gross retention, early.

The blue cells, and where each comes from

INPUT	SOURCE
Stage · type · days since engagement	The account record; the product
Outcome rating · days since review	The CSM, from the last Business Review
Open cases · highest severity · oldest	The support queue
Billing · onboarding past plan · survey	Finance · the plan · the Voice of the Customer

The Book tab, for the same twelve accounts

STAGE	GREEN	YELLOW	RED	RESEM.
Onboarding	1	1	0	97
Hypercare	2	1	0	85
Established	1	2	2	68
Renewal	1	0	1	67
All	5	4	3	77

Plays due: 4 · 2 · 1 · 1. Hypercare not Green: 1.

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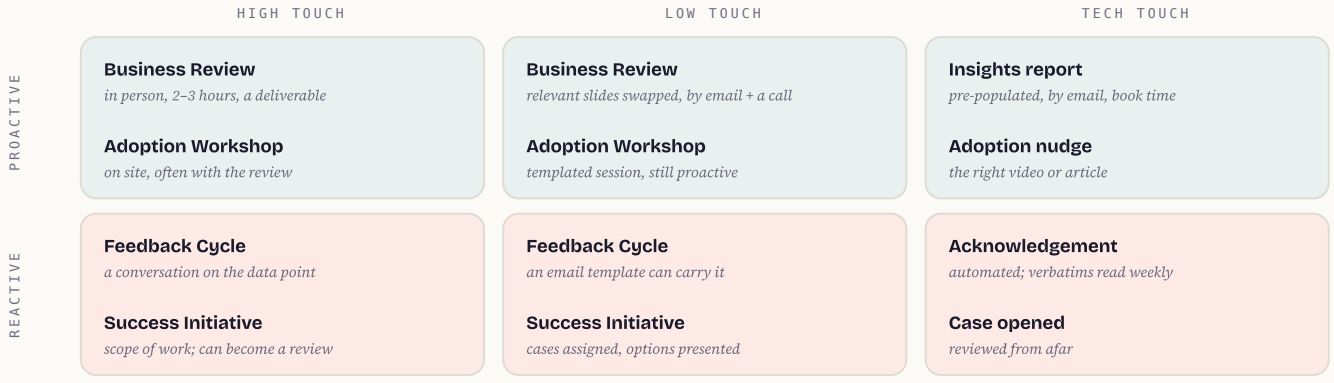
III · THE ANSWER

What we do with the answer.

An instrument measures and then says what to do. Each failed or flagged component names one of the Operating Model's four plays; the play's touch follows the account's tier. The scorecard writes the play on the row, so a CSM's week is the Play-due column sorted by color.

SIGNAL	COMPONENT	PLAY	POSTURE	WHAT THE PLAY DOES
Not engaged within the stage's window	Adoption	**Adoption Workshop**	Proactive	Evaluate the system, assess its potential value, and run the workshop so the customer gets value from the product — training and enablement, tied to a business result.
Open critical; cases over the limit or aging; billing or onboarding past due	Operations	**Success Initiative**	Reactive	A one-page scope of work: resources and expectations on both sides, a timeframe, a signature. Remedy the poor signal over 7–30 days and put the ball back in the customer's court.
A detractor; a passive; a stale survey	Feedback	**Feedback Cycle**	Reactive	Every piece of consolidated, actionable feedback gets a follow-up that catalogs it and gives the customer clear options — never a partial answer.
Rated below 3; a review overdue for the stage	Outcomes	**Business Review**	Proactive	Product, business value, partnership — delivered at the touch the account earns, recapped in a deliverable, always with an invitation to reach back out.



ABOUT 80% OF THE WEEK IN THE TOP ROW · ABOUT 20% IN THE BOTTOM · THE TOUCH FOLLOWS THE ACCOUNT'S TIER

The grid is the lesson plan's: three touches across, proactive and reactive down, the four plays placed where they live. The expectation that goes with it — about 80% of a CSM's week in the proactive row, 20% in the reactive — is the health score's second use. If the ratio inverts, the book is being managed by its tickets, and the score will show it before the renewal does.

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III · THE ANSWER

The plays, in health terms.

Each play is written up on its own on this shelf. Here is only what the health score needs to know about each: the signal that triggers it, and the shape it takes at each touch.

ADOPTION

Adoption Workshop

Opening the daily digest or logging in within seven days is the signal of engagement. A disengaged customer needs an evaluation of its system, an assessment of its potential value, and a workshop that delivers it.

- **High:** on site, often paired with the review; a customer who hired a bench of new managers needs them all trained
- **Low:** a templated session, modules swapped; still proactive — the data said they stopped
- **Tech:** the right video or help article, and "give me a call"

OPERATIONS

Success Initiative

Cases should be addressed promptly and comprehensively, as evidenced by few open cases; severity sets the tolerance. The initiative remedies a poor signal — load, severity, aging — over 7–30 days.

- **Evaluate** — what is going on; find the root cause
- **Assess** — the impact to the customer's business
- **Synthesize** — options, and the recommendation, and why
- Scope, resources, timeframe, signature; the ball goes back to the customer

FEEDBACK

Feedback Cycle

Customer feedback always prompts a follow-up engagement, to catalog it and to make sure the customer has options. Avoid incomplete responses; give clear, concise, comprehensive ones.

- **High:** almost always — a conversation in response to the data point, including a 10
- **Low:** an email template can carry it
- **Tech:** an acknowledgement; the verbatims read every week by a human

OUTCOMES

Business Review

The company delivers business insights to every customer every quarter. When a review or an insights report is due, the score says so, and the play delivers the right partnership offering at the right touch.

- **High:** in person or by phone; 2–3 hours delivering and following up; a physical recap
- **Low:** relevant slides swapped in, sent, with a call offered
- **Tech:** a pre-populated insights report by email, with time to book

THE ORDER OF THE PLAYS WHEN TWO SIGNALS FAIL

Adoption first, then operations, then feedback, then outcomes. A customer who has stopped using the product will not be helped by a business review; a customer with an open critical will not hear a workshop. The scorecard applies this order when it writes the play due. In Hypercare, whichever play it is, it is this week.

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III · THE ANSWER

What causes poor health.

When a book was scored for the first time and the Reds and Yellows were read one by one, three causes accounted for nearly all of them — and all three were controllable. That is the most hopeful thing the instrument says.

CAUSE ONE

Inconsistent adoption

The customer trained the people who were there on go-live day and nobody since. Managers turn over; the daily habit is not re-taught; usage thins until the product is a bill. Controllable by the Adoption Workshop, and by teaching the customer to train its own new hires.

CAUSE TWO

Operations challenges

A case that aged; hardware that failed on a Friday night; an invoice nobody owned. Each one small, each one a vote against the renewal, and together the second-largest cause of downgrades. Controllable by the Success Initiative and by the severity table being honored.

CAUSE THREE

A triggered play, not run

The score named the play and the week passed. The account went from Yellow to Red not because of the customer but because the answer was ignored. Controllable, entirely, by the manager: the Book tab's "plays due" is the list to ask about every Monday.

Beyond your control

Some Red is weather. An economic downturn; a segment in which customers like this one have been going out of business; an owner who sold. There is less a CSM can do, and it is still worth doing: show value, help the customer save its business, and record the cause so the book's Red is read correctly. A Red the team could not have prevented is a different number from a Red the team did not answer, and the quarterly review should separate them.

Health is dynamic

As the partnership grows in maturity, health must reflect the challenges and opportunities to deliver success — the definitions change over time, and so do the exemplars. What the score is *for* does not change: an abbreviated way to summarize the success the company shares with each customer, used to prioritize proactive outreach and manage a book of business. When a signal stops predicting renewals, change the signal. When the thresholds stop separating the book, re-read the Green pool. When every account is Green for two quarters, the exemplar has become too easy to resemble.

> WHO THE SCORE IS FOR
>
> The CSM, first: it is their Tuesday. The manager, second: it is their Monday. The executive team, third: the Book tab is the forecast nobody has to ask for. And the customer, last and never shown it — the score is an internal reading of an external fact, and the fact is what the customer feels. If the customer would disagree with the color, the color is wrong, and the review is where you find out.

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IV · RUNNING IT

Teach it in an hour.

The instrument came with a lesson plan, because a health score the team does not understand is a column they ignore. Forty-five to sixty minutes, taught by the manager of Customer Success, to every new CSM before they are given a book.

OBJECTIVES	BEFORE THE SESSION	WHO TEACHES IT
By the end, a CSM can: describe how health drives their own autonomous workflow; list and define the four components and what influences each; summarize the behaviors and circumstances that change health.	The platform overview; the platform's own "defining customer health" module, if it has one; this manual's pages 4–7.	The manager of Customer Success — not an enablement team. The person who will ask about the plays due on Monday should be the one who taught why.

MINUTES	SEGMENT	WHAT TO SAY, AND WHAT TO ASK
0–5	Intro and agenda	Three questions for the hour: what is health, how do we define it, how do we manage it.
5–15	What is health?	Health = success. It is visible everywhere; people will look at the owner of the account and ask "what's happening?". The three colors and what each one asks you to do. Actionable and consolidated.
15–30	The four components	One at a time, with the source: adoption from the product, outcomes from your reviews, operations from the queue and the invoice, feedback from the survey. Ask: "which of these can you move this week?" (all four).
30–40	Profiles and the exemplar	Not all customers are measured equally. The four stages; why Hypercare is tight; what a Green customer at each stage looks like in *our* data. Show the Profiles tab and argue with one threshold.
40–55	The plays	The touch grid. Proactive versus reactive — are we reaching out first, or are they? The four plays, which signal triggers each, and what each looks like at high, low and tech touch. The 80/20 expectation.
55–60	Metrics and expectations	Retention is the result; health, the survey and referrals are the leading indicators. Then the customer journey, as a discussion: where on the path does each color live?

THE EXERCISE

Score five of your own

End with the scorecard open. Each CSM scores five accounts from their new book, live, and reads the play due aloud. Disagreements with the color are the best ten minutes of the hour.

THE HABIT

Every contact leaves a trace

Use judgment on the channel — pick up the phone — and recap every conversation by email. The outcomes rating is only as honest as the notes behind it.

THE RE-TEACH

When the thresholds move

Every time Profiles changes, the hour is taught again, shorter. A score the team did not see change is a score they will stop trusting.

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IV · RUNNING IT

Standing it up, and the checklist.

Ninety days from a blank Profiles tab to a book scored weekly, with the plays being run and the first thresholds re-read against what actually renewed.

WEEKS ONE TO THREE

Find the exemplar

Pull last year's renewed-and-grown accounts. For each stage, read their adoption window, case load and aging, onboarding duration and survey scores. Write the medians into Profiles as Green, the worst quartile as the Yellow line. Decide the four sources and who exports each. Score ten accounts by hand and argue.

WEEKS FOUR TO EIGHT

Score the book

Every account on the Scorecard with its stage. Teach the hour. Start the Monday review of the Book tab: Reds first, then Hypercare, then plays due. Run the plays the first scoring named; most of the first Reds will be operations. Fix the thresholds the first month proved wrong — there will be two or three.

WEEKS NINE TO THIRTEEN

Make it the forecast

Put the color on the account record where the whole company can see it. Compare the first quarter's renewals to the colors they carried ninety days earlier — that is the instrument's own health score. Re-read the Green pool and re-issue Profiles. Hand the Book tab to the executive team as the retention forecast.

SET UP

- [ ] Four sources named, with an owner for each export
- [ ] Profiles set from your own Green pool, not a benchmark
- [ ] Every account given a stage; renewal dates loaded
- [ ] Plays mapped to signals; owners for each play
- [ ] The color visible on the account record

EVERY WEEK

- [ ] Scorecard inputs refreshed — adoption and operations daily if the platform allows
- [ ] Book tab reviewed Monday: Reds, Hypercare, plays due
- [ ] Every play due assigned and dated
- [ ] Hypercare accounts not Green answered this week

EVERY MONTH

- [ ] Outcome ratings updated from the reviews held
- [ ] Survey responses entered; detractors answered within the week
- [ ] Resemblance trend read for the Yellows
- [ ] 80/20 proactive-to-reactive checked per CSM

EVERY QUARTER

- [ ] Renewals compared to the colors they carried ninety days before
- [ ] Reds sorted: preventable, or weather
- [ ] Thresholds argued with the team; Profiles re-issued
- [ ] The hour re-taught where Profiles changed

EVERY YEAR

- [ ] The Green pool re-read; the exemplar moved
- [ ] Does every Red in the year's churn appear in a play log?

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