PROFESSIONAL REPORT

Customer Retention Analysis

A full analytical report on where retention is lost, built from the supplied usage and support data.

SCOPE	ACCOUNTS	METHOD	STATUS
24 months of account data	**1,842**	**Cohort and driver analysis**	**Sample output**

Executive Summary

Churn is concentrated, not general. Sixty-one percent of lost revenue over the period came from accounts that never completed onboarding, and a further 22% from accounts whose named champion left. Accounts that reached three active users in the first thirty days retained at 94% annually. The intervention with the largest measurable effect is therefore not a retention programme but an onboarding one.

> **PRINCIPAL FINDING**
>
> *Accounts reaching three active users within thirty days retain at 94%. Accounts that do not retain at 58%. No other variable in the dataset separates outcomes that sharply.*

Method and Limitations

- Cohorts built monthly by contract start date, 24 months, 1,842 accounts.
- Churn defined as non-renewal or downgrade below 50% of prior contract value.
- Usage data joined at account level; individual user attribution was unavailable for 11% of accounts.
- Support sentiment was not available in the source data and has been excluded rather than estimated.

Where Revenue Is Lost

Driver	Share of lost revenue	Accounts affected
Onboarding never completed	61%	212
Champion departure	22%	74
Price or budget	9%	38
Competitive loss	5%	19
Product gap	3%	11

Note the asymmetry: competitive loss accounts for only 5% of lost revenue yet receives the majority of sales attention in win-loss reviews. The data does not support that allocation of effort.

Cohort Behaviour

Cohort	Accounts	12-month retention	Net revenue retention
Reached 3 users in 30 days	1,104	94%	128%
Reached 3 users in 31–90 days	398	81%	104%

Never reached 3 users	340	58%	61%

Champion Departure

Seventy-four accounts lost their named primary contact during the period, and 46 of those churned within two renewal cycles. Accounts with three or more active stakeholders survived a champion departure in 81% of cases. The exposure is single-threading, and it is measurable in advance.

Recommendations

- Make three active users within thirty days the single onboarding success metric, and staff to it.
- Instrument and report single-threaded accounts weekly; treat them as an at-risk category regardless of usage.
- Move win-loss review effort from competitive loss to onboarding failure, proportional to revenue impact.
- Re-measure after two quarters using the same cohort definition so the comparison holds.

What Would Change This Conclusion

Two data gaps could alter the picture: user-level attribution for the missing 11% of accounts, and support interaction sentiment. If either becomes available the driver table should be rebuilt before further investment decisions are made.

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