

Active Clients	Healthy Clients	At-Risk Clients	Renewal Value — 90 Days	Expected Retained Revenue
8	3	1	\$110,400	\$199,920

CLIENT HEALTH			HEALTH DISTRIBUTION	
Status	Clients	Share		
Healthy	3	38%	Healthy	3
Watch	3	38%	Watch	3
At Risk	1	13%	At Risk	1
Churned	1	13%	Churned	1
Total Clients	8	100%	Updates automatically from Client Health.	

RENEWAL EXPOSURE		REVENUE PROTECTION	
Window	Renewal Value	Active Recurring Revenue	\$235,200
0–30 Days	\$39,600	Expected Retained Revenue	\$199,920
31–60 Days	\$70,800	Expansion Pipeline	\$25,200
61–90 Days	\$0	Revenue at Risk	\$0

TOP RETENTION ACTIONS	RETENTION SIGNAL
1. Contact every renewal due within 30 days. 2. Resolve At-Risk accounts before commercial negotiation. 3. Run a value/ROI review before discussing discounts. 4. Identify realistic expansion opportunities for Healthy accounts.	Move from health signal → retention action → renewal outcome. Review at-risk accounts first, then protect expansion opportunities.

START HERE

A guided onboarding path for turning client signals into retention and renewal action.

PLANVORA / CLIENT RETENTION & RENEWAL SYSTEM

7-STEP RETENTION WORKFLOW

01	Capture	Add clients, value, ownership, and renewal details.
02	Score	Set a health score and let the system classify the account.
03	Spot Risk	Review watch, at-risk, and renewal exposure signals.
04	Plan	Assign the next retention action, owner, and due date.
05	Renew	Use the renewal tracker to start conversations early.
06	Expand	Identify relevant expansion opportunities for healthy accounts.
07	Review	Use the weekly review to improve the system and protect revenue.

OPERATING PRINCIPLE

Retention improves when every risk signal has an owner, a next action, and a date. Keep the system current so the dashboard reflects reality.

CLIENT HEALTH

Score account health, surface risk signals, and assign the next best action.

PLANVORA / CLIENT RETENTION & RENEWAL SYSTEM

ID	Client	Segment	Owner	Monthly Value	Health Score	Health Status	Engagement	Last Touch	Risk Flag	Success Goal	Next Action
C-001	GreenLeaf	Small Business	Jordan	\$1,800	86	Healthy	High	Sep 5, 2026	No Known Risk	Increase weekly usage	Schedule value review
C-002	Northstar	Agency	Maya	\$3,200	72	Watch	Medium	Sep 3, 2026	Low Engagement	Restore adoption	Run adoption check-in
C-003	Atlas Co.	Professional Services	Jordan	\$2,400	54	At Risk	Low	Aug 28, 2026	No Usage	Restore weekly usage	Run reactivation campaign
C-004	BrightDesk	Startup	Maya	\$1,200	91	Healthy	High	Sep 6, 2026	No Known Risk	Expand reporting	Identify expansion opportunity
C-005	Oak & Co.	Creator	Alex	\$900	63	Watch	Medium	Aug 30, 2026	Champion Change	Rebuild stakeholder confidence	Map new champion
C-006	Summit Labs	Enterprise	Alex	\$6,500	38	Churned	Low	Aug 20, 2026	Support Issues	Resolve service friction	Escalate support recovery
C-007	Harbor Studio	Small Business	Jordan	\$1,500	78	Watch	Medium	Sep 1, 2026	Budget Risk	Prove ROI	Prepare ROI snapshot
C-008	Nova Works	Professional Services	Maya	\$2,100	88	Healthy	High	Sep 4, 2026	No Known Risk	Expand scope	Propose adjacent service

RENEWAL TRACKER

Keep renewal dates visible, prioritize exposure, and coordinate proactive client contact.

PLANVORA / CLIENT RETENTION & RENEWAL SYSTEM

ID	Client	Contract Type	Current Value	Renewal Date	Days to Renewal	Renewal Status	Owner	Last Contact	Next Contact	Expansion Opportunity	Notes
R-001	GreenLeaf	Annual	\$21,600	Sep 28, 2026	21	Upcoming	Jordan	Sep 5, 2026	Sep 12, 2026	\$4,000	Healthy; prepare ROI review
R-002	Northstar	Annual	\$38,400	Oct 18, 2026	41	Contacted	Maya	Sep 3, 2026	Sep 10, 2026	\$8,000	Adoption check-in
R-003	Atlas Co.	Quarterly	\$7,200	Sep 20, 2026	13	Negotiating	Jordan	Aug 28, 2026	Sep 9, 2026	\$1,500	At-risk recovery in progress
R-004	BrightDesk	Annual	\$14,400	Nov 5, 2026	59	Upcoming	Maya	Sep 6, 2026	Oct 1, 2026	\$3,000	Expansion-ready
R-005	Oak & Co.	Monthly	\$10,800	Sep 14, 2026	7	Contacted	Alex	Aug 30, 2026	Sep 9, 2026	\$1,200	Champion change
R-006	Summit Labs	Annual	\$78,000	Aug 30, 2026	-8	Churned	Alex	Aug 20, 2026	Aug 25, 2026	\$0	Missed renewal; win-back only
R-007	Harbor Studio	Annual	\$18,000	Oct 30, 2026	53	Upcoming	Jordan	Sep 1, 2026	Oct 2, 2026	\$2,500	Budget risk
R-008	Nova Works	Annual	\$25,200	Dec 12, 2026	96	Upcoming	Maya	Sep 4, 2026	Nov 1, 2026	\$5,000	Expansion candidate

RETENTION PLANNER

Turn health signals into owned, dated retention actions with visible expected impact.

PLANVORA / CLIENT RETENTION & RENEWAL SYSTEM

Priority	Client	Health	Risk / Trigger	Retention Goal	Action	Owner	Due Date	Status	Expected Impact	Notes
P1	Atlas Co.	At Risk	No Usage	Restore weekly usage	Run reactivation campaign	Jordan	Sep 10, 2026	In Progress	High	Review usage with client
P1	Summit Labs	Churned	Support Issues	Rebuild trust	Run executive recovery review	Alex	Sep 12, 2026	Planned	High	Win-back path
P2	Oak & Co.	Watch	Champion Change	Rebuild stakeholder confidence	Map new champion	Alex	Sep 9, 2026	In Progress	High	Confirm decision maker
P2	Harbor Studio	Watch	Budget Risk	Prove ROI	Prepare ROI snapshot	Jordan	Sep 15, 2026	Planned	Medium	Tie outcomes to renewal
P3	BrightDesk	Healthy	Expansion Opportunity	Expand scope	Propose premium reporting	Maya	Oct 2, 2026	Planned	Medium	Only after value review
P3	GreenLeaf	Healthy	No Known Risk	Increase advocacy	Request referral/case study	Jordan	Sep 20, 2026	Planned	Low	Optional advocacy motion

REVENUE FORECAST

Translate client health and renewal exposure into a practical recurring-revenue outlook.

PLANVORA / CLIENT RETENTION & RENEWAL SYSTEM

FORECAST INPUTS	
Active Recurring Revenue	\$235,200
Target Renewal Rate	85%
Expected Retained Revenue	\$199,920
Expansion Pipeline	\$25,200
Revenue at Risk	\$0

FORECAST SIGNAL
Use the forecast to prioritize renewals before revenue becomes at risk. Review expansion separately so retention assumptions stay conservative.

SIX-MONTH FORECAST					
Month	Opening ARR	Renewal	Retained	Expansion	Forecast ARR
Sep 2026	\$235,200	\$39,600	\$33,660	\$25,200	\$254,460
Oct 2026	\$254,460	\$56,400	\$47,940	\$25,200	\$271,200
Nov 2026	\$271,200	\$14,400	\$12,240	\$25,200	\$294,240
Dec 2026	\$294,240	\$25,200	\$21,420	\$25,200	\$315,660
Jan 2027	\$315,660	\$0	\$0	\$25,200	\$340,860
Feb 2027	\$340,860	\$0	\$0	\$25,200	\$366,060

RETENTION HEALTH SIGNALS	
Healthy Accounts	3
Watch Accounts	3
At-Risk Accounts	1
Churned Accounts	1
Renewals in Next 30 Days	3

PLAYBOOKS

A practical library for moving from client signal to retention, renewal, and expansion action.

PLANVORA / CLIENT RETENTION & RENEWAL SYSTEM

Playbook	Trigger	Goal	Step 1	Step 2	Step 3	Customer Message	Success Signal
Healthy → Expansion	Healthy score + clear success	Grow account without weakening trust	Review outcomes	Find adjacent need	Offer relevant expansion	"You're getting strong results. Would it be useful to explore one adjacent area?"	Client confirms a relevant expansion need.
Watch → Adoption	Score 60–79 or medium engagement	Restore consistent product value	Review usage	Remove friction	Set adoption milestone	"Let's make the next step easier and measurable."	Usage or engagement improves.
At Risk → Save	Score 40–59 or risk flag	Stabilize relationship	Diagnose root cause	Agree recovery plan	Track weekly	"I want to understand what is getting in the way and fix the right thing."	Risk flag is removed or score rises.
Renewal → Early	Renewal within 90 days	Create a calm renewal path	Review outcomes	Confirm priorities	Set renewal timeline	"Before renewal gets close, let's review what worked and what you need next."	Renewal plan agreed.
Renewal → Negotiation	Price or scope objection	Protect value and margin	Clarify objection	Re-anchor on outcomes	Offer scoped options	"Let's separate the outcome you need from the specific scope so we can find the right fit."	Commercial path accepted.
Churn → Win Back	Client churned or declined	Re-open a useful conversation	Review reason	Share relevant change	Invite low-friction return	"If the original issue has changed, I'd be happy to show you what's different."	Former client re-engages.
Champion Change	Primary champion leaves	Preserve continuity	Map stakeholders	Introduce new owner	Restate success plan	"I'd like to make the transition easy and keep your goals moving."	New champion confirmed.
Support Risk	Support issue repeats	Restore confidence	Acknowledge impact	Escalate ownership	Confirm resolution	"We own the issue. Here is the recovery path and when I'll update you."	Issue resolved and confidence restored.

WEEKLY METRICS							
Week Starting	At-Risk Accounts	Renewals ≤30d	Renewed	Revenue Protected			
Sep 7, 2026	1	3	0	\$0			

REFLECTION

What account needs intervention first?	
Which client is most ready for expansion?	
What renewal risk changed this week?	
What retention action produced the clearest value?	
What should be improved next week?	
What metric deserves leadership attention?	

SETTINGS

Save and operating defaults and reusable lists used across the

PLANVORA / CLIENT RETENTION & RENEWAL SYSTEM

HEALTH & RENEWAL DEFAULTS	
Renewal Window (days)	90
Healthy Threshold	80
Watch Threshold	60
At-Risk Threshold	40
Default Monthly Value	\$1,000
Target Renewal Rate	85%

ADDITIONAL REUSABLE LISTS

Contact Type	Risk Flag
Monthly	No Usage
Quarterly	Low Engagement
Annual	Support Issues
Project Retainer	Payment Risk
Other	Champion Change
	Budget Risk
	No Known Risk

Client Segments	Health Status	Renewal Status	Engagement
Startup	Healthy	Upcoming	High
Small Business	Watch	Contacted	Medium
Agency	At Risk	Negotiating	Low
Enterprise	Churned	Renewed	None
Creator		Declined	
Professional Services		Churned	
Other			