

ClientSuccess HealthScore Template

Engagement				15%
	Green	Yellow	Red	
Days since last engagement?	0-30 days	31-45 days	46+ days	75%
Professional Services Engaged	0-120 days	121 - 270 days	271 + days	25%
Usage				15%
	Green	Yellow	Red	
Licenses Assigned	85-100%	70-84%	0-70%	50%
Users logged in Last 7 Days	85-100%	70-84%	0-70%	50%
Adoption				15%
	Green	Yellow	Red	
Use of core platform modules last 7 days	Yes		No	25%
X Actions taken last 7 days	Yes		No	25%
Y items configured in the platform	Yes		No	25%
z items configured in the platform	Yes		No	25%
Journey				10%
	Green	Yellow	Red	
Days in Onboarding	60 - 90 days	91 - 115 days	116 - 150 days	25%
Milestone A completed	Yes		No	25%
Milestone B completed	Yes		No	25%
Days since start day	730 days +	0-730 days		25%
Payment				5%

	Green	Yellow	Red	
Paid latest invoice	Yes		No	30%
Outstanding balance	Yes		No	70%
Relationship				15%
	Green	Yellow	Red	
Executive Sponsor Identified	Yes		No	10%
POC Identified	Yes		No	10%
Champion Identified	Yes		No	10%
Completed Business Review	0-120 days	121 - 180 days	181+ days	40%
In-Person Meeting	0-120 days	121 - 180 days	181+ days	30%
Sentiment				15%
	Green	Yellow	Red	
Average NPS Score	9-10	8-7	0-6	20%
Human Assessment	Green	Yellow	Red	20%
CSAT	4-5	3	1-2	20%
Positive G2 Review	Yes		No	20%
Customer Effort Score (CES)	1-2	3	4-5	20%
Advocacy				10%
	Green	Yellow	Red	
Served as a reference	Yes	NA	NA	25%
Participated in a Case Study	Yes	NA	NA	25%
Partnered speaking engagement (event, webinar, podcast etc.)	Yes	NA	NA	25%
Referred a customer	Yes	NA	NA	25%
Total Score Value				100%