

Customer retention & growth audit

CLIENT

Max Mustermann GmbH

AUDIT DATE

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AUDITOR

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1. Documented operational bottlenecks

The following top 5 core structural issues were identified during the baseline audit.
These represent the primary friction points:

#	Identified baseline problem state	Operational impact / risk
1	Unclear sales-to-CS handoff & meeting overhead	Information gets lost between sales and CS. Team spends 6+ hours weekly in manual sync calls, delaying customer onboarding.
2	Lack of contract visibility & billing leaks	No central repository for renewal dates and special terms. Manual invoicing causes delayed billing and missed indexation.
3	Reactive customer support without early warnings	No health scores or product usage signals. Churn risks are identified only after cancellation notice is received.
4	Manual onboarding processes & high TTV	Onboarding milestones are managed manually via email/PDFs, leading to slow time-to-first-value and early customer frustration.
5	Untapped expansion potential in existing accounts	Account managers lack structured triggers for upsells or cross-sells, leaving expansion revenue to chance.

2. Quantitative health check (Core KPIs)

Metric name	Current baseline	Notes
Revenue & retention metrics		
Annual recurring revenue (ARR)	€ 2,400,000	Baseline ARR
Annual ARR reductions	€ 204,000	Total revenue lost to cancellations / downgrades
Annual ARR expansions	€ 120,000	Total revenue gained from upsells & cross-sells

Net retention rate (NRR)	96.5 %	Calculation: (Starting ARR - Churn ARR + Expansion ARR) / Starting ARR
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Average revenue per account (ARPA)	€ 24,000 / year	Calculation: Total ARR / Active Accounts
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Customer lifecycle & efficiency

Time-to-first-value (TTV)	28 days	Time from contract sign to first value milestone (Target: < 14 days)
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Average onboarding duration	45 days	Contract sign to full implementation
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First-year account churn rate	12.0 %	Accounts churning in the first 12 months
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Operations & support capacity

Internal alignment time / FTE	6.5 hours / week	Time spent in internal sync meetings
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Support ticket resolution time	18.5 hours	First response to final resolution
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Centralized contract visibility	40 %	Contracts tracked and available
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3. Operational area analysis & scoring

A. Internal collaboration & workflow efficiency

Evaluation of internal communication flow, meeting culture, cross-functional interfaces, and handoffs.

Audit subcategory	Score (1–5)	Key findings & observations
Internal meeting load & time allocation	[2 / 5]	Team spends 6.5h/week in internal syncs. Missing async updates.
Playbooks & standard operating procedures (SOPs)	[4 / 5]	Team created several clear playbooks and defined needed SOPs
Sales-to-CS & CS-to-product handoff workflows	[2 / 5]	Handoff happens via Slack text. Account context is often lost.
Documentation & internal communication culture	[3 / 5]	Notion exists but lacks standardized process templates.
Role clarity & task ownership	[3 / 5]	Roles are mostly clear, but responsibility during onboarding overlaps.

Area score

OPTIMIZATIONS POSSIBLE (Score 2.6–3.8) ▾

B. Contract management & billing hygiene

Transparency across customer contracts, renewal terms, auto-renewals and billing accuracy.

Audit subcategory	Score (1-5)	Key findings & observations
Centralized contract repository & terms overview	[2 / 5]	Contracts stored in Google Drive folders without structured naming.
Tracking of auto-renewals	[1 / 5]	Renewal dates tracked in Excel and 3 missed renewals in Q1/Q2..
Billing automation & error prevention	[2 / 5]	Invoices created manually; recurring delay of 5-10 days.
Capture of unbilled services	[3 / 5]	Custom dev requests usually captured, but small add-ons missed.
Area score	ACTION NEEDED (Score 1.0-2.5) ▾	

C. Onboarding & time-to-value (TTV)

Structure and velocity during the initial 30–90 days post-sale.

Audit subcategory	Score (1-5)	Key findings & observations
Speed to first value realization (TTV)	[2 / 5]	TTV currently at 28 days due to delayed technical kickoffs.
Standardized onboarding milestones & customer guidance	[3 / 5]	Milestones exist in PDF, but not interactively tracked with customer.
Expectation gaps	[3 / 5]	Some of the customers were over-sold with features, which don't exist -> high risk
Early risk signals & day 1–90 engagement tracking	[2 / 5]	No automated check-in triggers if customer stops logging in.
Area score	ACTION NEEDED (Score 1.0-2.5) ▾	

D. Strategic growth & value alignment

Evolving from a "Cost Center" (Support) to a "Growth Driver".

Audit subcategory	Score (1-5)	Key findings & observations
CS strategy & culture	[1 / 5]	Currently perceived as support/cost center; lack of growth incentives.
Team knowledge	[4 / 5]	Team has very deep product knowledge but can be trained in upsellings.
Data integrity & tools	[3 / 5]	Customer data is already in a good stage but more integration between tools needed.
Tool adoption	[4 / 5]	CRM is used a lot but other helpful tools aren't easily accessible and due to that less used
Churn strategy & root causes	[2 / 5]	Churn is tracked but not strategically analyzed or mitigated.
Area score		OPTIMIZATIONS POSSIBLE (Score 2.6-3.8) ▾

E. Feedback & proactive communication

Systematic dialogue to prevent churn and uncover expansion potential.

Audit subcategory	Score (1-5)	Key findings & observations
Feedback culture (NPS/CSAT)	[1 / 5]	No automated internal or external feedback loops.
Engagement strategy	[2 / 5]	Lack of proactive, non-support-related check-in cadences.
Communication maturity	[2 / 5]	Reliance on high-friction tickets; missing low-friction channels.
Area score		ACTION NEEDED (Score 1.0-2.5) ▾

F. Self-service & scalability

Reducing ticket volume through empowerment and automation.

Audit subcategory	Score (1–5)	Key findings & observations
Knowledge Base (Help Center)	[4 / 5]	Clear and extensive knowledge base with up-to-date contents. Make it more modular.
In-App Guidance / Automation	[3 / 5]	Only a bit in-app support; customer relies more on direct human support.
Service Accessibility	[5 / 5]	Clear service-level agreements (SLAs) and optimal reachability.

Area score

GOOD (Score 3.9-5.0) ▾

4. Key revenue & retention leverage areas

#	Identified leverage area	Core problem & proposed solution	Calculation logic / basis	Est. value (€/yr)
1	Meeting reduction & workflow	Asynchronous handoff & documentation; frees up ~20% team capacity.	6.5h/week across 5 FTEs = 338h saved @ 55€/h internal cost	€ 18,590
2	Contract & billing hygiene	Central contract register; recover lost indexation & prevent billing delays.	3 missed price indexations (avg. € 4,000) + 10 days reduced billing lag	€ 22,000
3	Onboarding TTV optimization	Reduce TTV from 28 to 12 days; prevent early 90-day churn.	Saving ~2 churned accounts in first 90 days @ € 17,500 ARPA	€ 35,000
4	Automated upsell triggers	Usage signal tracking for CSMs (+4% expansion rate).	4% expansion lift on € 2.4M ARR base through signal-based cross-sell	€ 25,000
5	Feedback Loops	Automated NPS/CSAT loops to identify risks & upsell potential early.	Capturing 3 at-risk accounts & uncovering 4 expansion potentials per year	€ 15,000
6	Self-Service & Content	Modular Help Center & In-App guides to reduce ticket noise by ~15%.	~20 hours support time saved/year across the team @ 55€/h internal cost	€ 13,200

TOTAL ESTIMATED ANNUAL LEVERAGE POTENTIAL: € 128,790 / year

5. Implementation roadmap

Priority	Action item	Impact	Effort
P1 - High	Implement async handoff template & meeting rules	High	Low
P1 - High	Build central contract register & indexation alerts	High	Low
P1 - High	Streamline customer onboarding & TTV tracking	High	Medium
P2 - Med	Set up usage signal alerts & health scoring	High	Medium
P2 - Med	Automate renewal reminders & auto-renewal workflows	Medium	Low
P2 - Med	Define expansion playbook & CSM upsell triggers	High	Medium
P3 - Low	Establish async customer feedback & NPS loops	Medium	Low