

RETENTION ENGINE

CASE STUDY

How a Series C Healthcare company stopped the leak and started compounding

Stage Series C **Sector** Healthcare SaaS **ARR** \$48M **Engagement** 12 months

Net Revenue Retention 97% → 108% **Gross Revenue Retention** 84% → 91%

Client Anonymized

CLIENT SNAPSHOT

\$48M

ARR at Kickoff

420

Provider-Organization Customers

84%

Gross Revenue Retention (Baseline)

97%

Net Revenue Retention (Baseline)

WHAT WE FOUND

- New logos masked the leak. 16% of ARR walked out the back door each year while bookings kept the top line climbing
- Onboarding took 118 days to reach first value. Slow starts churned at 2.6× the rate of fast ones
- No shared view of account health. CSMs saw risk 26 days before renewal, too late to change the outcome
- Renewals were an event, not a motion. One in three closed late, and expansion waited on the customer to ask

THREE PILLARS, ONE RETENTION SYSTEM

PILLAR 01

ONBOARDING & TIME-TO-VALUE

Win the first 90 days

118 → 62

Days to first value

Milestone-based onboarding and tiered implementation nearly halved time to value.

PILLAR 02

HEALTH SCORING & EARLY WARNING

See risk before it speaks

26 → 142

Days of warning before renewal

A six-signal health score on every account moved the warning from weeks to months.

PILLAR 03

RENEWAL & EXPANSION MOTION

Run renewals like pipeline

68% → 92%

Renewals closed on time

A 180-day cadence and clear ownership made renewals a forecast and expansion a habit.

THE RESULT: NRR 97% → 108% · GRR 84% → 91% · \$5.3M ARR IMPACT ON A \$48M BASE

PILLAR 1 · ONBOARDING & TIME-TO-VALUE

GOAL: WIN THE FIRST 90 DAYS

THE DATA

Metric	Baseline	After 12 Months	Change
Days to first value	118	62	−47%
90-day activation rate	54%	81%	+27 pts
Implementations delivered on time	46%	88%	+42 pts
First-year logo churn	19%	9%	−10 pts
Onboarding CSAT	3.6 / 5	4.5 / 5	+0.9

WHY IT MATTERS

2.6×

Accounts that went live after day 90 churned at 2.6× the rate of accounts live before it. Speed to value was the strongest predictor of renewal in the book.

WHAT WE DID

ACCOMPLISHMENTS

- Rebuilt onboarding around four milestones with exit criteria, replacing a 40-task checklist
- Launched three implementation tiers matched to ACV and integration complexity
- Moved EHR integration scoping into the sales handoff, removing a three-week stall after signature
- Stood up a weekly cross-functional go-live review

NEXT STEPS

- Automate integration scoping in the CRM so every closed-won deal arrives implementation-ready
- Extend the milestone model to expansion modules and multi-site rollouts
- Target: 45 days to first value

PILLAR 2 · HEALTH SCORING & EARLY WARNING

GOAL: SEE RISK BEFORE IT SPEAKS

THE DATA

Metric	Baseline	After 12 Months	Change
Accounts with a health score	0%	100%	+100 pts
Risk lead time before renewal	26 days	142 days	+116 days
Save rate on at-risk accounts	33%	58%	+25 pts
Executive sponsor coverage	41%	86%	+45 pts
Annual logo churn	12%	7%	-5 pts

WHY IT MATTERS

71%

of churned ARR in the baseline year showed two or more warning signals at least a quarter before renewal. The signals existed. The system to read them did not.

WHAT WE DID

ACCOMPLISHMENTS

- Built a six-signal health score: usage, clinician adoption, support load, sponsor engagement, NPS and billing status
- Scored all 420 accounts and surfaced red, yellow and green on the CRM account record
- Launched a weekly risk review with a named owner and a dated action for every red account
- Wrote save plays for the four most common risk patterns

NEXT STEPS

- Backtest the score against the next two renewal cohorts and reweight the signals
- Add a customer ROI signal tied to documented outcomes
- Target: 65% save rate on flagged accounts

PILLAR 3 · RENEWAL & EXPANSION MOTION

GOAL: RUN RENEWALS LIKE PIPELINE

THE DATA

Metric	Baseline	After 12 Months	Change
Renewal opened before term end	45 days	180 days	4× earlier
On-time renewal rate	68%	92%	+24 pts
Expansion rate (% of starting ARR)	13%	17%	+4 pts
Multi-year renewals	22%	41%	+19 pts
Renewal forecast variance	±18%	±6%	3× tighter

WHY IT MATTERS

\$1.9M

in added expansion ARR on the \$48M base.
Customers were ready to grow. They were waiting to be asked.

WHAT WE DID

ACCOMPLISHMENTS

- Installed a 180/120/90/60-day renewal cadence with stage definitions in the CRM
- Replaced QBRs with value reviews that put documented ROI in front of the economic buyer
- Split ownership cleanly: CSMs own adoption and renewal, Account Managers own expansion
- Added renewals and expansion to the weekly forecast call

NEXT STEPS

- Repackage multi-site and module pricing so expansion is a standard path
- Tie CSM variable comp to GRR and Account Manager comp to net expansion
- Target: 115% NRR in year two

RESULTS AT A GLANCE

\$3.4M

ARR Retained · +7 pts GRR

\$1.9M

Expansion ARR Added · +4 pts

\$5.3M

Total ARR Impact on a \$48M Base

PILLAR	METRIC	BASELINE	AFTER 12 MONTHS	CHANGE
Overall	Net Revenue Retention	97%	108%	+11 pts
Overall	Gross Revenue Retention	84%	91%	+7 pts
Overall	Annual Logo Churn	12%	7%	−5 pts
Onboarding	Days to First Value	118	62	−47%
Onboarding	90-Day Activation Rate	54%	81%	+27 pts
Health Scoring	Risk Lead Time Before Renewal	26 days	142 days	+116 days
Health Scoring	Save Rate on At-Risk Accounts	33%	58%	+25 pts
Renewal & Expansion	On-Time Renewal Rate	68%	92%	+24 pts
Renewal & Expansion	Expansion Rate (% of Starting ARR)	13%	17%	+4 pts

THE ROAD AHEAD

NEXT MOVES

01

Automate the handoff

Integration scoping moves into the CRM, so every closed-won deal arrives implementation-ready.

Q1 · IMPLEMENTATION + REVOPS

02

Sharpen the signal

Backtest the health score against two renewal cohorts, reweight it, and add a customer ROI signal.

Q1-Q2 · CS OPERATIONS

03

Package the expansion

Repackage multi-site and module pricing, then align CSM and Account Manager comp to GRR and net expansion.

Q2 · CRO + FINANCE

WHERE IT LANDS

YEAR-TWO TARGETS

Net Revenue Retention

108% → 115%

Gross Revenue Retention

91% → 93%

Days to First Value

62 → 45

Save Rate on At-Risk Accounts

58% → 65%

BUILT TO GROW. NOW ALSO BUILT TO RETAIN.