

Renewal & Retention Playbook Starter

What to actually do before a contract or relationship is up for renewal, not just hope it renews.

90 Days Before Renewal

- ☐ Review account health: are they actually using what they're paying for?
- ☐ Identify any unresolved issues or complaints that could affect the decision
- ☐ Flag any champions who've left the company or changed roles

60 Days Before Renewal

- ☐ Proactive check-in conversation, not just a renewal notice
- ☐ Share results or value delivered so far, in specific terms
- ☐ Surface any upcoming changes early, not as a surprise

30 Days Before Renewal

- ☐ Formal renewal conversation or proposal sent
- ☐ Address any hesitation directly rather than letting it go unspoken
- ☐ Confirm timeline and next steps clearly

At-Risk Signals To Watch For

- ☐ Declining usage or engagement
- ☐ Slower response times to your outreach
- ☐ A champion has left or gone quiet
- ☐ Repeated, unresolved complaints

If They Don't Renew

- ☐ Exit conversation to understand the real reason
- ☐ Logged for pattern review across other lost accounts
- ☐ Door left open for the future, not burned