



CRM Customer Retention Strategy Checklist 2026

Customer Segmentation & Profiling

Define and categorize your customer base by lifecycle stage, value, and behavior to tailor retention efforts.

Target Segment Name

Write something...

Customer Segments to Include

- ☐ Enterprise
- ☐ Mid-Market
- ☐ SMB
- ☐ Startup

Primary Segmentation Driver

- ☐ Demographics
- ☐ Firmographics
- ☐ Behavioral Data
- ☐ Psychographics

Segmentation Criteria Definition

Write something...

Minimum Annual Contract Value (ACV) Threshold

Enter a number...

Churn Risk Identification

Establish key indicators and automated triggers to identify at-risk customers before they churn.

Churn Risk Indicators Detected

- ☐ Decreased Login Frequency
- ☐ Unresolved High-Priority Support Tickets
- ☐ Negative NPS/CSAT Score
- ☐ Reduced Feature Usage
- ☐ Contract Expiry Approaching
- ☐ Competitor Mention in Communication

Customer Health Score

Enter a number...

Last Active Date

Enter date...

Risk Assessment Summary

Write something...

Risk Severity Level

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Primary Driver of Risk

Write something...

Loyalty Program Integration

Configure reward structures, points systems, or tiered benefits within the CRM to incentivize long-term loyalty.

Loyalty Program Name

Write something...

Reward Types Included

- ☐ Discounts/Coupons
- ☐ Points-Based System
- ☐ Exclusive Access/Early Access
- ☐ Cashback
- ☐ Gift Cards

Program Eligibility Criteria

Write something...

Minimum Points Required for Redemption

Enter a number...

Program Launch Date

Enter date...

Loyalty Program Terms & Conditions Document

 Upload File

Automated Re-engagement Workflows

Set up automated email and notification sequences for dormant users or customers nearing the end of their contract.

Trigger Event Name

Write something...

Communication Channels

- ☐ Email
- ☐ SMS
- ☐ Push Notification
- ☐ In-App Message

Workflow Priority Level

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

Workflow Activation Date

Enter date...

Email Template Content

Write something...

Customer Health Scoring Setup

Define the metrics (usage frequency, support tickets, NPS) used to calculate a real-time health score for every account.

Health Score Name

Write something...

Key Performance Indicators (KPIs)

- ☐ Product Usage Frequency
- ☐ Support Ticket Volume
- ☐ NPS Score
- ☐ Payment Delays
- ☐ Feature Adoption Rate
- ☐ Contract Renewal Date Proximity

Minimum Threshold Score

Enter a number...

Scoring Frequency

- ☐ Real-time
- ☐ Daily
- ☐ Weekly
- ☐ Monthly

Weighting Logic Documentation

Write something...

Feedback Loop & Survey Automation

Integrate CSAT, NPS, and CES surveys directly into the CRM workflow to capture and act on customer sentiment.

Survey Type

- ☐ NPS (Net Promoter Score)
- ☐ CSAT (Customer Satisfaction)
- ☐ CES (Customer Effort Score)

Target NPS Score Threshold

Enter a number...

Automated Trigger Channels

- ☐ Email
- ☐ In-App Notification
- ☐ SMS
- ☐ Direct Mail

Survey Deployment Date

Enter date...

Survey Feedback Analysis Criteria

Write something...

Survey Template Documentation

 Upload File

Proactive Customer Success Management

Create task templates and reminders for Account Managers to conduct periodic business reviews and check-ins.

Next Scheduled Business Review Date

Enter date...

Account Health Status

- ☐ Healthy
- ☐ At Risk
- ☐ Critical/Churn Risk

Key Account Engagement Activities Completed

- ☐ Quarterly Business Review (QBR) Performed
- ☐ Product Training Session Conducted
- ☐ Feature Adoption Workshop Held
- ☐ Executive Sponsor Re-validation

Account Expansion Opportunities

Write something...

Meeting Minutes or QBR Presentation

 Upload File

Retention Analytics & Reporting

Build dashboards to track Monthly Recurring Revenue (MRR) retention, churn rate, and Customer Lifetime Value (CLV).

Reporting Period Start Date

Enter date...

Reporting Period End Date

Enter date...

Target Churn Rate (%)

Enter a number...

Actual Churn Rate (%)

Enter a number...

Primary Retention Metric Tracked

- ☐ Churn Rate
- ☐ Customer Lifetime Value (CLV)
- ☐ Net Promoter Score (NPS)
- ☐ Renewal Rate

Data Sources Used for Reporting

- ☐ CRM Native Dashboards
- ☐ Google Analytics
- ☐ Customer Support Logs
- ☐ External BI Tools

Analysis of Variance (Target vs. Actual)

Write something...

Monthly Retention Report PDF

 Upload File

Personalization & Content Strategy

Utilize CRM data to deliver personalized product updates, educational content, and targeted upsell opportunities.

Target Segment Name

Write something...

Content Channels

- ☐ Email
- ☐ SMS
- ☐ In-App Notifications
- ☐ Social Media Retargeting
- ☐ Direct Mail

Personalization Logic

Write something...

Content Type

- ☐ Educational/How-to
- ☐ Promotional/Discount
- ☐ Product Update
- ☐ Re-engagement

Campaign Launch Date

Enter date...

Content Creative Assets

 Upload File

Post-Retention Analysis & Optimization

Establish a process for reviewing lost accounts to identify patterns and refine the retention strategy for 2026.

Analysis Completion Date

Enter date...

Primary Reason for Churn

- ☐ Price/Cost
- ☐ Competitor Switch
- ☐ Product Feature Gap
- ☐ Poor Customer Support
- ☐ Technical Issues/Bugs
- ☐ Other

Identified Improvement Areas

- ☐ Onboarding Process
- ☐ Product Roadmap
- ☐ Pricing Model
- ☐ Customer Support Training
- ☐ Feature Functionality

Key Findings and Root Cause Analysis

Write something...

Action Items for Next Quarter

Write something...

Churn Data Report (CSV/PDF)

 Upload File

Strategy Manager Approval

< Previous

> Next

🏁 Finish

🛠️ Generate Sample Report