Fictional example · AI draft

Customer renewal action plan

Your input

Which customer is it?	Example Care Group
What does the customer buy now, and when does it end?	A rota planning licence for three sites. The contract ends on 1 June.
How does the customer use it now?	Two sites plan with it every week. The third site still plans in Excel.
Who are you in touch with, and who decides on renewal?	We're in touch with the planner. The regional manager decides on renewal.
What makes the renewal uncertain?	A new regional manager is starting who doesn't know the software.

Renewal proposal

Where the customer stands

Two of the three sites use rota planning every week. The decision-maker is new and doesn't know the software yet.

Biggest risk

The new regional manager mainly sees the site that plans in Excel, and doubts the value of three licences.

> Question for the renewal conversation
>
> As regional manager, how will you know that the rotas at all three sites are in order?

Actions before the renewal

First ask the planner which site plans in Excel and why. Then arrange an introduction with the regional manager, well before 1 June.

Who to speak to

The new regional manager. Ask the planner to introduce you.

Check first

You don't know whether the third site uses Excel by choice or simply hasn't switched yet. Ask the planner before preparing the conversation.

This is an AI draft based on your input. AI hasn't looked anything up or checked anything. Review it before you use it.