How to use this pack

Welcome to your customer health score calculator! This template is designed to help you easily track and analyze the health of your customers based on four key metrics: Product Usage, Support, Sentiment, and Engagement. It gives you a clear and comprehensive view of customer health, allowing you to prioritize your efforts and provide better service to your most at-risk accounts.

How to use the template:

In the Dashboard tab, you'll see columns for Customer Name, Product Usage Score, Support Score, Sentiment Score, and Engagement Score. You'll need to fill in the data for each of these metrics based on your customer interactions and internal data. We have a handy scoring logic to help you, simply fill in the final scores and we'll total up your score. Based on that we'll then determine your health status:

Green: 80-100 (Healthy)

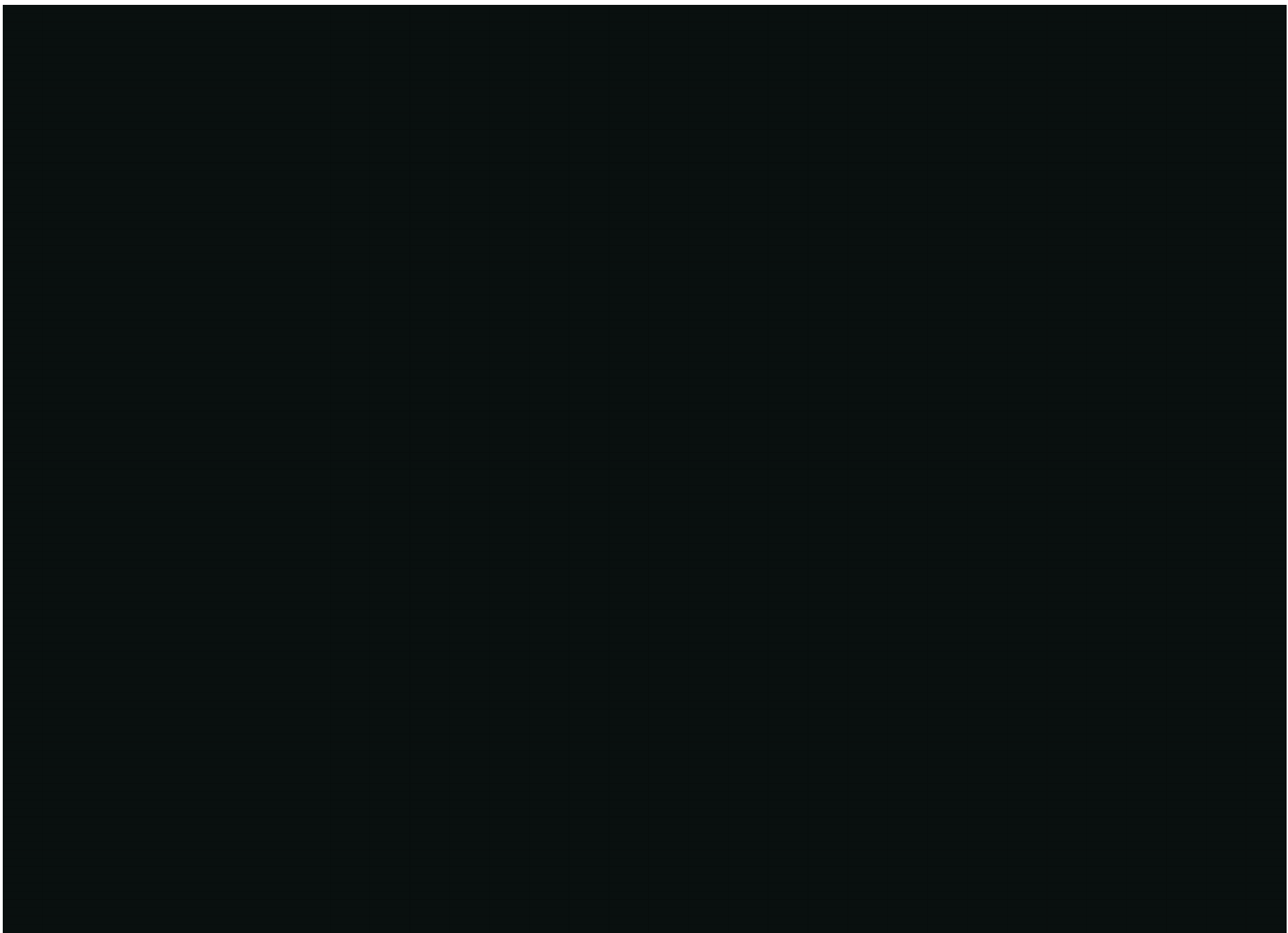Yellow: 60-79 (Watch)

Red: 0-59 (At-Risk)

Make sure to focus on Red customers to reduce churn, and engage Yellow ones for improvement. By using this, you can stay proactive and ensure that no customer gets left behind!
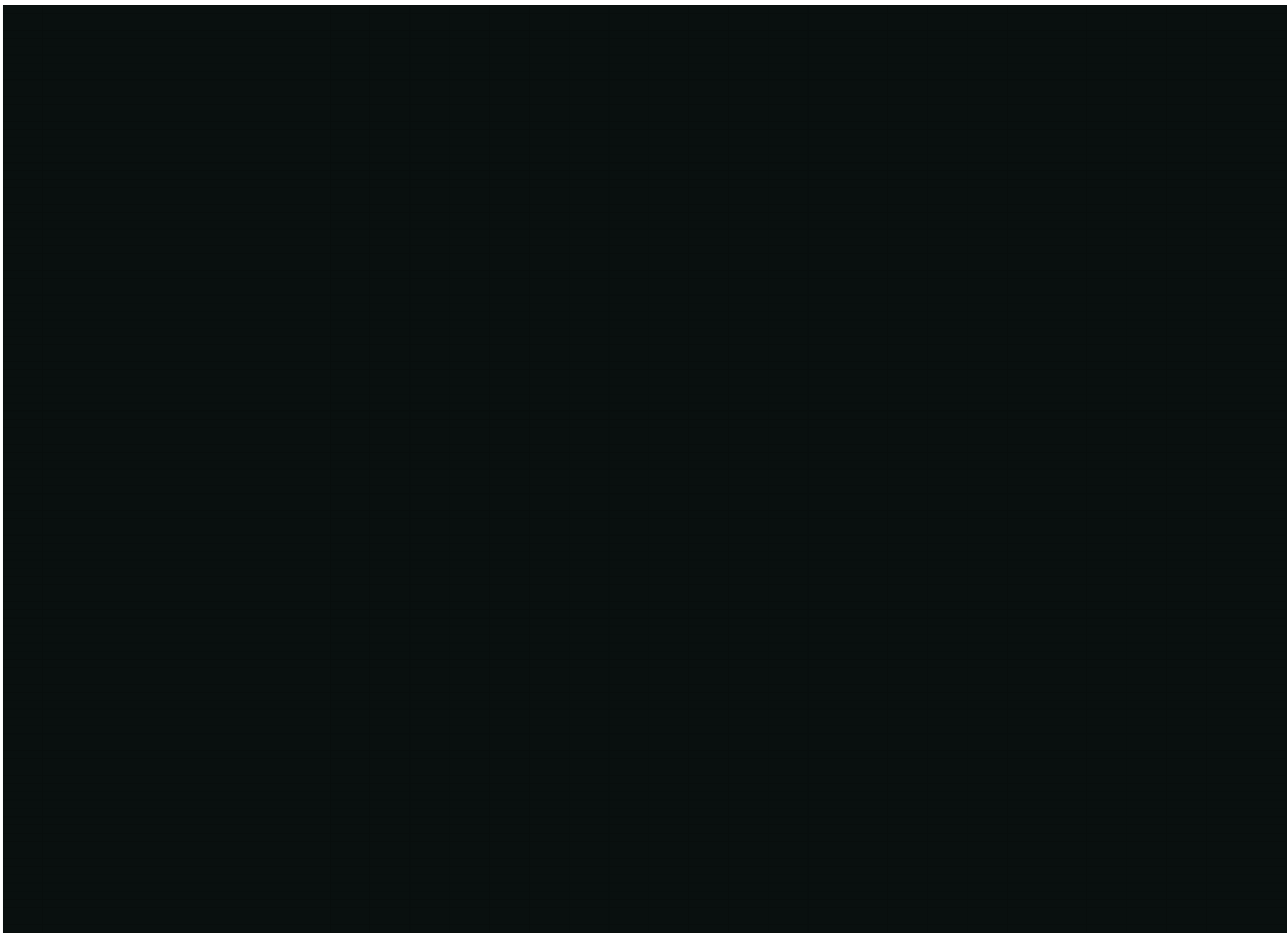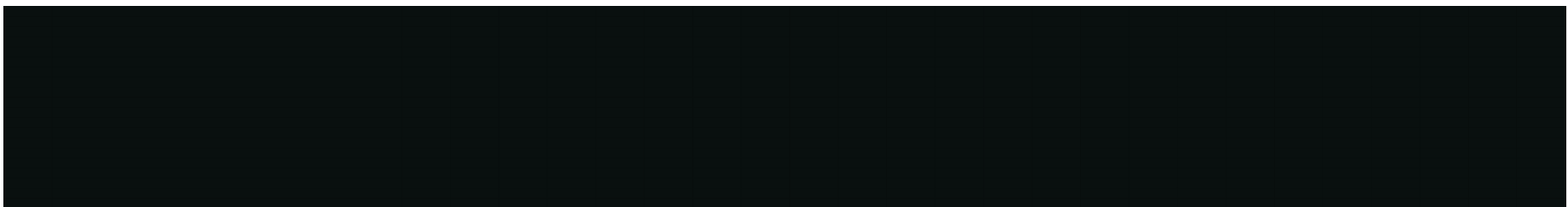
Calculator dashboard

Customer name	Product usage score	Support score	Sentiment score	Engagement score	Total health score	Status
Customer A	25	30	25	20	100	Green
Customer B	20	24	18	15	77	Yellow
Customer C	12	15	10	10	47	Red

Scoring logic

Product usage score (based on logins/month) 25 points max.

Logins per month	Score
≥15	25
10–14	20
5–9	12
<5	0

Customer	Score
Customer A	25
Customer B	20
Customer C	12

Support score (based on open vs resolved tickets) 30 points max.

Logins per month	Score
0–1 open tickets in last 30 days	30
2–3 open tickets	24
4–5 open tickets	15
>5 open tickets	6
Open critical ticket for >7 days	0

Customer	Score
Customer A	30
Customer B	24
Customer C	15

Sentiment score (based on NPS) 25 points max.

NPS score	Score
9–10	25
7–8	18
5–6	10
<5	0

Customer	Score
Customer A	25
Customer B	18
Customer C	10

Engagement score (based on emails/meetings/EBRs) 20 points max.

Touchpoints in last 90 days	Score
≥5	20
3–4	15
1–2	10
0	0

Customer	Score
Customer A	20
Customer B	15
Customer C	10