Customer Health Score Handoff Checklist

Domain Methods

Purpose: decide whether a customer health or churn-risk score is ready to change CS behavior, or whether it should stay in diagnosis while the handoff gets safer.

1. Name the target CS decision

- Score, segment, or account motion being reviewed:
- Current owner of the score:
- The CS behavior this score may change:
  [ ] Diagnose only [ ] Manual prioritization
  [ ] CRM/Slack alert [ ] Renewal-risk workflow
  [ ] AI-assisted next action
- One sentence rule: This score will change ______________________________.

2. Check source trust and account identity

Before the score affects live CS motion, confirm:

- Product usage freshness:
- Support escalation status:
- Billing or renewal context:
- Account hierarchy / workspace mapping:
- CSM / account owner field:

If the team cannot explain which account, owner, or source field the score belongs to, keep it out of automated workflows until that is fixed.

3. Require reason codes and action context

CS should see more than red / yellow / green.

- What signals moved the score?
- How fresh are those signals?
- What action should the owner take next?
- What exception or suppression rule applies?
- Where should CS flag a bad score?

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4. Set the score’s authority level
Choose one level for this rollout. Do not skip ahead.

Diagnose only:
- Use when source freshness, identity, or reason codes are not trusted yet.

Prioritize manually:
- Use when CS can review a risk list with context and override bad examples.

Trigger workflow:
- Use when owner rules, suppression rules, expiration, and false-positive review are in place.

Safe for AI-assisted action:
- Use only when recommended actions have stable data, human-review boundaries, and a feedback loop.

5. Suppression and exception rules
List exceptions that should prevent normal churn-risk plays:
- Implementation / onboarding status:
- Known outage or support escalation:
- Billing or procurement issue:
- Strategic account / executive coverage:
- Recent outreach already completed:

6. Feedback loop
- Where will CSMs flag false positives?
- Where will they flag missed risk?
- Who reviews examples each week?
- What model, source, or workflow change happens when the pattern is real?
- What decision remains unchanged until the next review?

Next step if the score is ready: Data Activation.
Next step if source trust or workflow ownership is not ready: AI Readiness Audit or Data Foundation.