

ACCOUNT MANAGEMENT · EMAIL SEQUENCE

Renewal Email Sequence

5-touch sequence kicked off T-90 days before renewal date. Sent by the AM, BCC the CSM.

T-90 days

Subject: Looking ahead — your CloudHealth renewal & what's next

Hi {{first_name}},

Hard to believe we're already 9 months into our partnership. Your renewal comes up on {{renewal_date}}, and I want to make sure the next 12 months are even better than the last.

I'll be sending a short summary next week of where you stand on volume, growth, and the roadmap we discussed at QBR. In the meantime — anything on your mind worth flagging?

— {{am_name}}

T-75 days

Subject: {{client_name}} — 9-month performance recap

Hi {{first_name}},

Quick recap as promised:

- {{orders_ytd}} orders fulfilled · {{growth_pct}}% growth over the previous 9 months
- {{nps}} NPS · {{refund_rate}}% refund rate (well below benchmark)
- Top 3 opportunities for the next 12 months: {{expansion_summary}}

Let's get 30 minutes on the calendar in the next two weeks to walk through the renewal proposal. Here's my link: {{calendar_link}}

— {{am_name}}

T-45 days

Subject: Renewal proposal for {{client_name}}

Hi {{first_name}},

Attached is your renewal proposal for the period {{new_term_start}} – {{new_term_end}}. Highlights:

- Pricing locked at current rate for 12 more months
- {{new_features_summary}} included at no additional cost
- Expansion option: {{expansion_offer}}

Happy to walk through it live — or send redlines back whenever works. Goal is to have this signed by {{target_signature_date}} so there's no gap in service.

— {{am_name}}

T-21 days

Subject: Quick nudge on renewal

Hi {{first_name}},

Just bumping this — wanted to make sure the proposal didn't get buried. We're about 3 weeks out from renewal, and I'd love to lock things in this week if possible.

Any blockers I can help clear?

— {{am_name}}

T-7 days

Subject: One week to renewal — let's close it out

Hi {{first_name}},

One week to your renewal on {{renewal_date}}. To avoid any service interruption, I need a signature back by **{{hard_deadline}}**.

If anything in the proposal isn't right, please flag it today and I'll turn around redlines within 24 hours. Otherwise the DocuSign link is here:

{{docusign_link}}

Looking forward to another great year together.

— {{am_name}}

Internal Owner Notes

- Each touch is sent by the AM, BCC the CSM.
- If no response by T-30, escalate to the AM's manager.
- If renewal at risk (health score < 70), pause this sequence and trigger the *Risk Recovery Plan* instead.