

AI CUSTOMER RISK TRIAGE BRIEF

A Practitioner Guide for CS Leaders

How to turn scattered customer signals into a structured risk diagnosis, owner map, and 7-day get-well plan.

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25 Years of Customer Success Leadership | B2B SaaS

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01 / WHY THIS GUIDE EXISTS

Not Another AI Hype Document

Most of the conversation about AI in Customer Success right now is focused on the wrong thing. Teams are using AI to write cleaner follow-up emails, summarize call transcripts, and generate QBR slides faster. That is fine. But it is not where the real operating value is.

The highest-value AI use case in CS is decision support: helping your team determine whether a customer is actually at risk, what type of risk is present, who needs to act, and what needs to happen in the next seven days.

AI in Customer Success should not just help teams write cleaner emails. It should help teams make better operating decisions from messy customer signals.

This guide documents a practitioner-built workflow called the AI Customer Risk Triage Brief. It is not a churn prediction model. It is not a Gainsight replacement. It is a structured way to take the fragmented signals a CSM already has and turn them into a clear risk diagnosis, owner map, and action plan.

The workflow is built on 25 years of running and building Customer Success teams across B2B SaaS at companies including Salesforce, Rapid7, Acquia, and InsightSquared. Every risk category, every output module, and every prompt instruction comes from real operating experience, not theory.

What you will find in this guide:

- The core problem this workflow is designed to solve
- A ten-category risk taxonomy built for B2B SaaS CS teams
- A step-by-step workflow for running a risk triage session
- The full AI master prompt you can use immediately
- A sample scenario showing how the output should look
- Operator notes for CS managers and leaders
- Guidance on operationalizing the workflow for your team

02 / THE CORE PROBLEM

The CRM Can Say Green While the Renewal Is Already Drifting

Customer risk rarely arrives as one clean red flag. It shows up as scattered clues spread across systems and conversations that nobody is connecting.

- Usage is trending down.
- The champion is responsive, but only wants to talk about support tickets.
- A QBR gets rescheduled. Then rescheduled again.

- The executive sponsor leaves.
- Procurement asks whether every license is still needed.
- The CSM is active, but nobody can clearly explain the business outcome.

The problem is not access to data. CS teams typically have more data than they can act on. The problem is interpretation: distinguishing noise from material risk, identifying what is missing, and creating a clear action plan before renewal pressure takes over.

If the CSM cannot describe why the customer purchased the software and what business outcomes they are trying to drive, the team is blind to real risk.

What a broken risk process looks like:

Risk lives in the CSM's head

There is no structured place to capture, review, or escalate risk. The manager finds out about a problem on the renewal call.

Activity is mistaken for health

A CSM who is sending emails and having calls is assumed to be managing the account well. Nobody is asking what business outcome is being driven.

Every issue looks the same

A support ticket and an executive sponsor departure are both treated as risk indicators without any distinction in urgency or type.

Risk review is not a rhythm

Risk is reviewed only when a deal is at imminent risk or when a forecast call gets uncomfortable. There is no consistent inspection motion.

The action plan is vague

"Follow up with champion" and "schedule QBR" are not action plans. They are placeholders that push the problem forward.

03 / WHAT THE TRIAGE BRIEF PRODUCES

From "Something Feels Off" to a Structured Decision

The AI Customer Risk Triage Brief takes anonymized account context as input and produces a structured operating brief for review by a CSM, CS manager, or CS leader. It does not replace judgment. It organizes the inputs so human judgment can work faster.

01 Account Snapshot

Customer context, ARR, renewal timing, health status, and primary use case.

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- 02 Overall Risk Level**
Low, Medium, High, or Critical with a 2-3 sentence rationale.
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- 03 Top 3 Risk Drivers**
The specific risk categories firing, with severity, evidence, assumptions, and potential impact.
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- 04 Evidence vs. Assumptions**
Separates what is known from what is inferred. Flags what needs validation.
-
- 05 Missing Information**
The most important gaps the team must close before acting confidently.
-
- 06 Likely Root Cause**
The underlying driver: value, relationship, adoption, support, product, commercial, or strategic.
-
- 07 Recommended CSM Actions**
Specific next actions with suggested timing.
-
- 08 Recommended Manager Actions**
Inspection points for the next 1:1 or risk review.
-
- 09 Cross-Functional Actions**
Actions for AE, Renewals, Support, Product, or leadership with owner by role.
-
- 10 Customer Conversation Objective**
The goal of the next customer conversation and key questions to validate.
-
- 11 7-Day Action Plan**
Day 1-2, Day 3-4, Day 5-7, and desired outcome by end of week.
-
- 12 Escalation Recommendation**
Yes, No, or Not Yet. If Yes: to whom and why. If Not Yet: what triggers it.
-
- 13 CRM / CS Platform Update**
Suggested internal note, risk reason, next step, and due date.
-

04 / RISK TAXONOMY

The Ten Risk Categories the Workflow Inspects

These ten categories were built from real CS operating experience. Most accounts that go sideways have two or three of these firing at once. The workflow is designed to inspect the pattern, not overreact to one visible issue.

01 Engagement Risk

Are they showing up and participating in the relationship? This includes responsiveness, meeting attendance, content consumption, and general willingness to engage.

02 Value Realization Risk

Can the CS team and the customer clearly articulate the business outcome being driven? Activity without measurable value is a risk signal even when the relationship feels good.

03 Executive Alignment Risk

Is there executive sponsorship? Is there budget-level value alignment? An engaged champion with no access to the executive buyer is fragile.

04 Relationship / Champion Risk

Is the champion influential, engaged, and connected to strategy? Champion turnover, title changes, or reduced access are material signals.

05 Adoption / Deployment Risk

Is the product deployed and actually being used in a meaningful way? License utilization without user adoption is not a health indicator.

06 Support / Service Experience Risk

Are open issues, escalations, or service misses creating distrust? One support ticket is noise. A pattern of unresolved issues is a risk signal.

07 Product / Roadmap Risk

Are product gaps, missing features, or roadmap uncertainty affecting confidence in the long-term fit of the solution?

08 Commercial / Renewal Risk

Are procurement, budget, downsell, or competitive pressures emerging? Procurement involvement before the normal renewal window is a leading indicator.

09 Change Management Risk

Did the customer actually change internal processes and behaviors required to realize value? Adoption without organizational change is surface-level.

10 Strategic Priority / M&A; Risk

Has the customer's leadership changed, the company been acquired, or the strategic priority that drove the purchase been deprioritized?

Not every issue is red. A single support ticket or canceled meeting alone does not mean an account is at risk. This workflow inspects the pattern of signals across multiple categories, not isolated noise.

05 / THE WORKFLOW

Running a Risk Triage Session: Step by Step

The workflow takes 15 to 30 minutes for an account with reasonably complete context. It is designed to be run by a CSM with manager review, or by a CS manager preparing for a risk review meeting.

Step 1	Select the Account <p>Start with an account where your gut says something is off but the health score still says green. Or start with any renewal coming up in the next 90 days that does not have a clear get-well plan.</p>
Step 2	Gather the Context <p>Pull together what you know across the thirteen input fields: ARR, renewal timing, products, health status, original purchase reason, business objectives, usage trends, recent CSM notes, support context, stakeholder context, commercial context, and any other relevant signals. Use anonymized versions if running in a public or shared tool.</p>
Step 3	Enter the Inputs <p>Paste the context into the prompt template in Section 06. Be honest about what you know versus what you are assuming. The workflow is designed to surface that distinction.</p>
Step 4	Review the Output <p>Read the output as a starting point, not a verdict. The overall risk level and top risk drivers are the most important sections to review first. Then check the Evidence vs. Assumptions section to see what still needs validation.</p>
Step 5	Fill the Missing Information Gaps <p>The Missing Information section is often the most valuable output. Before acting on the risk brief, identify which gaps can be closed quickly through internal review and which require a direct customer conversation.</p>
Step 6	Build the Action Plan <p>Use the 7-Day Action Plan as a starting point. Assign specific owners to each action. Identify which actions require a customer conversation and which can be handled internally.</p>

Step 7**Update the CRM**

Use the suggested CRM / CS Platform Update to record the risk assessment, reason, next step, and due date. This is not optional: if it is not in the system, it does not exist as an operating record.

Step 8**Bring to Manager Review**

Any account rated High or Critical should be reviewed with a CS manager before the next customer interaction. The brief is the agenda for that conversation.

06 / THE MASTER PROMPT

The AI Prompt Behind the Workflow

Copy the prompt below into Claude, ChatGPT, or your preferred AI tool. Replace the bracketed placeholders with the account context you gathered in Step 2. The prompt is designed to produce all thirteen output modules in a structured, reviewable format.

You are acting as a senior Customer Success leader helping triage customer renewal and account risk.

Analyze the customer context below and create a structured Customer Risk Triage Brief.

Your job is not to summarize the account generically. Your job is to identify the most likely

sources of risk, separate evidence from assumption, identify missing information, and recommend

the next best actions for the CSM, manager, and cross-functional stakeholders.

Use the following risk categories:

1. Engagement Risk
2. Value Realization Risk
3. Executive Alignment Risk
4. Relationship / Champion Risk
5. Adoption / Deployment Risk
6. Support / Service Experience Risk
7. Product / Roadmap Risk
8. Commercial / Renewal Risk
9. Change Management Risk
10. Strategic Priority / M&A; Risk

For each risk, classify severity as Low, Medium, High, or Critical.

Important rules:

- Do not invent facts.
- Label assumptions clearly.
- Do not treat all negative signals as equal.
- Do not assume customer activity equals customer value.

- Do not assume a happy champion means the renewal is safe.
- Prioritize risks that could materially affect renewal, expansion, stakeholder confidence, or long-term adoption.
- If there is not enough information, say what is missing.
- Recommend specific next actions, not generic "follow up" advice.
- Separate internal actions from customer-facing actions.
- Identify which team or role should own each action.
- Include a 7-day action plan.

Customer context:

Customer Alias: [CUSTOMER ALIAS]

ARR / Contract Value: [ARR]

Renewal Timing: [RENEWAL TIMING]

Products Owned: [PRODUCTS]

Current Health Score / Status: [HEALTH SCORE]

Original Purchase Reason: [WHY THEY BOUGHT]

Business Objectives / Desired Outcomes: [BUSINESS OBJECTIVES]

Current Usage / Adoption Trend: [USAGE TREND]

Recent CSM / Meeting Notes: [MEETING NOTES]

Support Issues / Escalations: [SUPPORT CONTEXT]

Stakeholder / Executive Sponsor Context: [STAKEHOLDER CONTEXT]

Commercial / Renewal Context: [COMMERCIAL CONTEXT]

Other Relevant Context: [OTHER]

Create the Customer Risk Triage Brief with all thirteen output modules.

(See Section 07 sample for expected output structure.)

This prompt is a starting point. As you learn more about your specific customer base, risk patterns, and data availability, the prompt should be adapted. See Section 09 for guidance on customizing for your team.

07 / SAMPLE SCENARIO

Acme Financial Services: How to Read the Pattern

This sample demonstrates what the workflow is designed to catch: a pattern of connected signals that a health score would miss and a CSM might underweight individually.

Input: Account Context

Customer Alias	Acme Financial Services
ARR / Contract Value	\$185,000
Renewal Timing	76 days from now
Products Owned	Core platform and analytics module

Current Health Status	Yellow
Original Purchase Reason	Improve visibility into operational risk and reduce manual reporting
Business Objectives	Reduce manual reporting time, improve leadership visibility, standardize team workflows
Usage / Adoption Trend	Admin usage stable; end-user usage down 28% over the last 60 days
Recent CSM / Meeting Notes	Champion says the team is "too busy" to expand rollout. QBR has been rescheduled twice. Customer wants to focus the next call on two support tickets. Customer asked for usage data and said leadership is reviewing all vendor spend this quarter.
Support Issues	Four open support tickets. One has been open for 21 days and was escalated last week.
Stakeholder / Exec Sponsor	Director-level champion is responsive but tactical and does not appear to own budget. Original VP sponsor left 45 days ago and no replacement has been identified.
Commercial / Renewal Context	Procurement requested usage data and asked whether all licenses are needed.
Other Context	Reporting configuration is taking longer than expected. No recent business review completed. Competitive pressure unknown.

What a Good Output Should Identify

A strong triage brief on this account does not flag it as high risk because of the support tickets. The tickets are a contributing signal. The deeper pattern is:

- The VP executive sponsor left 45 days ago and has not been replaced.
- Renewal is 76 days out with no business review on the books.
- End-user usage is down 28% with no adoption recovery plan in place.
- Procurement is asking whether all licenses are needed.
- The champion is director-level and does not appear to own budget.
- There is no documented business outcome narrative.
- The business review has been rescheduled twice.

The primary risk drivers should be identified as:

Executive Alignment Risk	HIGH	VP sponsor gone, no replacement, procurement involvement signals budget review
Value Realization Risk	HIGH	No documented outcomes, leadership reviewing all spend, no recent business review

Adoption / Deployment Risk	MEDIUM	End-user usage down 28%, rollout expansion stalled
Support / Service Risk	MEDIUM	Contributing but not the primary driver; one escalated ticket open 21 days

This is the differentiation the workflow is built to deliver: it interprets connected signals rather than flagging the loudest individual issue. The support tickets are visible. The missing executive sponsor and the lack of a value narrative are the actual risk.

08 / READING THE OUTPUT

How to Use the Brief Without Over-Rotating

The triage brief is a structured starting point for human review. It is not a verdict. Here is how to read each section without over-rotating on the output.

Overall Risk Level

Use this as a prioritization signal, not a forecast. A "High" rating means the account deserves immediate attention and should be reviewed with your manager. It does not mean the customer is churning.

Top 3 Risk Drivers

Focus on the risk category, not just the severity score. A Medium-rated Adoption risk with specific user-level evidence may be more actionable than a High-rated Commercial risk with mostly assumptions.

Evidence vs. Assumptions

This is often the most important section. Before any customer conversation, close the assumption gaps that can be resolved internally. Do not ask customers to confirm things you should already know.

Missing Information

Build the first internal action plan around closing these gaps. Some can be addressed before the next customer call through CRM review, usage data, or conversations with AE or Support.

7-Day Action Plan

Assign specific owners before the plan leaves the manager review. An unowned action is not an action. Day 1-2 should include at least one internal action.

Escalation Recommendation

If the recommendation is "Yes" and the output is based on strong evidence, escalate before the next customer interaction, not during it. If the recommendation is "Not Yet," define what would trigger escalation and set a date to revisit.

The output should not be used as the sole basis for renewal forecasting, customer escalation, commercial decisions, or customer-facing communications. Validate facts and assumptions before use.

09 / OPERATOR NOTES

What 25 Years of CS Operating Experience Says

- 1 Start where your gut already knows something is wrong.**

The best first accounts to run through this workflow are not the ones with the most data. They are the ones where a CSM or manager already has a feeling that something is off but cannot articulate why. The workflow helps put structure around an intuition that already exists.
- 2 Activity is comforting. Outcomes are what gets renewed.**

A CSM who is sending weekly emails, running calls, and submitting QBR decks is not necessarily managing risk. The question is whether those activities are moving the customer toward a measurable business outcome. If they are not, the account is more fragile than the activity log suggests.
- 3 The champion relationship is the most overrated health signal.**

CS teams consistently overweight champion engagement as a proxy for account health. A champion who loves your CSM but cannot connect the product to a business outcome does not control the renewal decision. Know where the budget sits.
- 4 Missing information is not neutral.**

When you do not know whether an executive sponsor is engaged, whether the customer can articulate their business outcome, or why procurement is asking for usage data, that uncertainty is itself a risk signal. Treat unknowns as findings, not as blanks to fill in later.

5 Risk management turns into negotiation management when it starts too late.

Most renewal saves are expensive because they start at 60 days out or less. The customers who get saved require executive escalation, discount commitments, and significant internal resources. Running this workflow at 90 to 120 days out is a different conversation entirely.

10 / BRINGING THIS INTO YOUR CS TEAM

The Prompt Is the Easy Part

The prompt is the easy part. Operationalizing it is where teams get real value.

Running a risk triage brief as a one-off exercise is useful. Building it into a repeatable CS operating motion is where the real impact is. Here is what that transition typically requires.

Adapt the Risk Taxonomy

The ten risk categories in this guide cover the most common patterns in B2B SaaS CS. Your business may have specific risk signals that deserve dedicated categories: industry compliance requirements, seasonal usage patterns, or multi-stakeholder renewal structures.

Map Your Data Availability

The quality of the output depends on the quality of the inputs. Before building this into your operating cadence, map which data fields are reliably available, which require CSM interpretation, and which are typically missing. Design your workflow around what exists.

Define the Manager Inspection Rhythm

The brief should not live only in the CSM's head. Build a regular cadence where any account rated High or Critical gets reviewed with a CS manager within 48 hours of the brief being run. The brief is the agenda for that review.

Customize the Prompt for Your Context

Add your company's product names, customer segments, and renewal process into the prompt. The more specific the prompt, the more directly applicable the output.

Test Across Multiple Accounts First

Before rolling out to your full team, run the workflow across five to ten accounts with known outcomes. Calibrate: did the workflow identify High risk on accounts that churned? Did it rate Low risk on accounts that renewed cleanly? Adjust the prompt and taxonomy based on what you find.

Connect to CRM and CS Platform Updates

The CRM / CS Platform Update module in the output is designed to be actionable immediately. Build a team norm: if you ran a triage brief on an account, the CRM is updated the same day.

Work With LCG to Implement This for Your Team

LCG helps B2B SaaS Customer Success teams adapt this workflow to their risk taxonomy, customer data, operating cadence, manager inspection process, and CRM or CS platform.

What the Engagement Produces

- Current-state risk workflow review
- Customized risk taxonomy for your customer base
- Data and input availability map
- Company-specific AI prompt and workflow
- Manager inspection guide
- Cross-functional owner map
- Test results across selected anonymized account scenarios
- 30-day operating roadmap

Book an AI Risk Triage Working Session

Explore whether this workflow could fit your CS team, customer data, and risk review process.

lauerconsulting.ai | troy@lauerconsultinggroup.com

Lauer Consulting Group

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lauerconsultinggroup.com

Troy Lauer | troy@lauerconsultinggroup.com

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