



— CUSTOMER SUCCESS / CALL REVIEW

The Customer Success OKR Playbook

Score any customer call on the six behaviors that decide whether the account renews, and hear churn before the dashboard does.

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USE IN 30 SECONDS

Use this in 30 seconds. Open your last customer call, whatever stage it was. Give each of the six criteria on page 3 a 1 to 5, and write the quote that earned it. Whatever scores lowest is next quarter's OKR, phrased as a behavior. Then run the churn read: count the loud signals against the healthy ones.

To have talk2bud do it for you on every call from now on, see the last page.

Why A Customer Success OKR Misses The Thing That Predicts Churn

Most customer success OKRs point at net revenue retention, churn rate, or CSAT. Those are lagging numbers. They confirm, at quarter close, what your accounts already decided across dozens of calls. By the time NRR moves, the renewal has already drifted.

The leading indicator is sitting untranscribed in every onboarding call, QBR, and renewal conversation: whether the customer named a value, whether adoption went past one champion, whether the renewal is a conversation you started. This playbook scores those, so a human can run it in ten minutes and talk2bud can run it on every call automatically.

WHAT MAKES THIS DIFFERENT FROM A CHECKLIST

A checklist asks “did you talk about value?” and a manager who said the word value ticks the box. This scores what a 2 sounds like against what a 5 sounds like, with the phrasing, so two people reviewing the same call land on the same number. That property is the only reason it is worth running twice.

Instructions

Analyze this as a customer success call: onboarding, a check-in, a QBR, or a renewal conversation. “You” is the customer success manager, “Them” is the customer. Score the call against the six criteria below, giving each a 1 to 5 and quoting the line from the transcript that earned it. Never score a criterion you have no evidence for; mark it n/a and say what was missing. Judge only what was said out loud, never tone you cannot hear in the words. Then run the churn read in Red flags separately: it grades risk, not health, and a warm call can still carry a loud churn signal. Where a score is 3 or below, write the exact line the CSM should have used instead.

What this lens is for

A call between a customer success manager and an existing customer, at any lifecycle stage. A healthy call ends with the customer having named a concrete value, adoption reaching past a single champion, and a next milestone booked with an owner and a date. The six criteria are weighted differently by stage: onboarding leans on first value, the QBR on value named, the renewal window on renewal timing.

How to read the call

- Read once end to end before scoring. First-pass scoring rewards the warm moments.
- Note every number Them says: money, hours, days saved, headcount, dates.
- Note every person Them names who is not the main champion.
- Track the pronoun: when a champion moves from “our rollout” to “your tool”, flag it.
- Mark whether the renewal, the budget, or a procurement step came up at all.
- Check the last two minutes separately. Most calls fail the next-step criterion there.

The criteria

1 Value named by the customer

LISTEN FOR: Them states an outcome the product produced, ideally as a number, in their own words.

SCORE	SOUNDS LIKE
1-2	You assert the value and they agree with an adjective. “Yeah, it’s been really helpful.”
3	A vague benefit with no number. “It’s saved us some time, for sure.”
4-5	A quantified outcome, unprompted, in their words. “It cut our onboarding from nine days to two.”

EVIDENCE: The customer’s own sentence about what the product did, or a note that none exists.

2 First value reached

LISTEN FOR: On an onboarding or kickoff call, a concrete first outcome and a date it happens.

SCORE	SOUNDS LIKE
1-2	Setup talk with no outcome. “We’re still getting everyone’s logins sorted.”
3	A plan to reach value with no date. “We’ll start using it properly soon.”
4-5	A first result and when it happened. “We ran our first cycle Tuesday and it saved the ops team a day.”

EVIDENCE: The first outcome named and its date, or the absence of one.

3 Adoption past the champion

LISTEN FOR: A second name, a second team, usage beyond the single power user.

SCORE	SOUNDS LIKE
1-2	Everything routes through one person. "I'm the only one really in there so far."
3	Others named but not active. "A couple of people have logins."
4-5	New users or teams active and expanding. "Two teams on it now, and Ops is asking for seats."

EVIDENCE: Every user or team named beyond the champion.

4 The renewal named early

LISTEN FOR: The renewal date, the budget, or a procurement step raised with time left to work it.

SCORE	SOUNDS LIKE
1-2	Renewal never comes up, or gets sprung in the final month.
3	Acknowledged but not worked. "Renewal's coming up at some point."
4-5	On the table with runway. "Renewal's in March, so let's get your CFO the numbers in January."

EVIDENCE: The first mention of renewal, and how much runway it left.

5 Risk surfaced and owned

LISTEN FOR: Them raises a problem and You name it, size it, and assign a fix with a date.

SCORE	SOUNDS LIKE
1-2	The complaint is absorbed. “We’ll look into it.”
3	Acknowledged but unassigned. “Yeah, that’s annoying, I’ll flag it internally.”
4-5	Named, sized, owned, dated. “That export bug costs you an hour a week. I own it, fix by Friday.”

EVIDENCE: The problem Them raised and what happened to it on the call.

6 A next milestone booked on the call

LISTEN FOR: A specific next outcome, an owner, a date, the next call booked while both are still on the line.

SCORE	SOUNDS LIKE
1-2	A vague forward promise. “I’ll send over some resources.”
3	A next call with no purpose. “Let’s sync again next month.”
4-5	Outcome, owner, date, booked. “You enable SSO by the 12th, I bring the adoption report, we meet the 15th.”

EVIDENCE: The last thing agreed before the goodbye.

Scoring

Score each criterion 1 to 5. Mark n/a where the transcript gives you nothing, and say what was missing rather than guessing. Report the average across the criteria you could score, to one decimal place, alongside the churn read.

- **4.0 and up.** A healthy account. Write the renewal case from the value they named.
- **3.0 to 3.9.** Solid with gaps. The two lowest criteria are next quarter's focus.
- **2.0 to 2.9.** At risk. Value unnamed, or the account is single-threaded.
- **Below 2.0.** Treat it as a save, not a check-in.

A high average with a loud churn line is still a losing account. Say so plainly.

Red flags

The audible churn signal. Each is not a low score, it is a stop, with a consequence.

- **"We're re-evaluating our tools this quarter."** An active competitive evaluation you were not told about. Escalate the same day.
- **"My VP asked what we're paying for this."** Budget scrutiny reached someone who never saw the value. Get a number named on this call.
- **Champion says they are changing roles.** Your single thread is about to be cut. Book a warm handoff before they leave.
- **"We just haven't had the time to roll it out."** Adoption stalled and nobody owns restarting it. Assign the restart on the call.
- **The pronoun shift, "our rollout" to "your tool."** The customer no longer counts the product as theirs. The strongest early tell there is.
- **The passive future with no owner or date, "we'll get to it."** A commitment that will not survive the week.

How to report

- Open the TL;DR with the average score, the churn read, and the single biggest risk. One line each.
- Under what went well: each criterion scoring 4 or 5, with its number and the quote that earned it.
- Under what to improve: each criterion scoring 3 or below, with the quote that cost it and the exact line to use next time.

- Under decisions: only what was actually decided, in the speakers' own terms.
- Under action items: owner first, then the commitment and the date, plus one drill aimed at the lowest criterion.
- If instead you are asked for a single performance block, run the six criteria there, same evidence rule, and list the churn flags at the end.

Coaching notes

- Work one criterion at a time. A CSM asked to fix six things fixes none.
- The order that compounds fastest: 1 (value named), then 4 (renewal timing), then 3 (multi-threading).
- Watch the pronoun shift across a quarter of calls. It moves before every other signal does.

Reading Scores Across A Quarter, Not A Call

One call tells you about one call. A book of accounts tells you where retention leaks. Put the six criteria down the side and your accounts across the top, and a dark row shows up in a minute. Almost always it is criterion 1 or criterion 4, value and renewal timing, the two that quietly decide net revenue retention.

The rows behave differently when you fix them. Criterion 6, booking the next milestone, is a habit and moves in a week. Criterion 1, getting the customer to name a value, takes a quarter, because it needs the nerve to ask “what would you tell your VP this is worth?” and wait. Criterion 4, renewal timing, is a calendar discipline, not a skill: put every renewal date ninety days out on one page and the ambushes stop.

The 30-Day Rollout

Days 1 to 5. Baseline. Score your own last five customer calls without changing how you run them. Find your weakest criterion. Do not tell the team yet.

Days 6 to 12. Calibrate. Have a colleague score two of the same calls. Anywhere you disagree by more than a point, argue it to the quote until the anchor settles it.

Days 13 to 21. Score every call. The rubric and the churn read run on each live call. Each Friday, report two numbers: the criterion averages and the count of accounts carrying a loud churn signal.

Days 22 to 30. Read the trend. Compare against the baseline. Expect movement on the focus criterion and noise elsewhere. If a criterion never separates healthy accounts from at-risk ones in your book, cut it. A rubric you have edited is a rubric your team owns.



Run this as a Lens in talk2bud

Scoring one call by hand takes ten minutes. Scoring every call takes a program nobody sustains past week three. talk2bud records the call, transcribes it, and reads it back through this exact playbook, quoting the lines that earned each score.

- 1 Download **talk2bud-lens-customer-success-okr-rubric-v1.0.md** from the article this came with.
- 2 In talk2bud, open **Modes**, switch to **Call lenses**, press **New**.
- 3 Name it **Customer Success**, then paste the file's **Instructions** section into the **Instructions** field.
- 4 Under **Playbook**, press **Import file...** and pick the same file. Save.
- 5 Before you analyze your next call, pick this lens. The read comes back scored against these criteria.

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Running this with a team? The same file imports into **Channel settings** → **meeting type** → **Playbook** with the **Import document** button. Every call of that type then gets the same read, so the scores compare across people instead of across moods.