



PLAYBOOK

Restaurantology[®] SaaS Churn Guide

Sales Ops tactics and CRM recommendations to help track restaurant tech **software attrition** at enterprise scale

Restaurantology is a go-to-market (GTM) activation consultancy that helps B2B restaurant tech companies grow faster and smarter with real-time market intelligence and optimized operational efficiency.

Learn more at restaurantology.io.

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Written by: Grant Gadoci

Any questions? Please contact hello@restaurantology.io.

Table of Contents

Preface	3
Intro & expectation setting	4
The perks—and problems—with tracking churn	7
What is churn, and why is tracking it important?	7
Why churn tracking can be difficult for restaurant tech companies	9
Where most companies get churn tracking wrong	10
What a solution to churn tracking might look like	13
Part 1 - Aligning how we talk about churn	16
Top 5 essential fields for comprehensive subscription tracking	16
The 4 critical fields to accurately define churn	17
Part 2 - Tailoring Salesforce for churn tracking	22
Step 1: Building out your custom object	22
Step 2: Incorporating subscriptions into related objects	27
Step 3: Introducing automations to reduce workload	30
Step 4: Assigning ownership for ongoing success	33
Part 3 - Building reports for churn tracking	36
Top 3 ways to report on churn in your CRM	36
Creating your first MRR churn dashboard	39
Additional considerations for advanced churn tracking	42
Part 4 - Turning churn insights into action	45
Identify key churn drivers	45
Focus on churn you can influence	45
Set SMART churn goals	46
Final thoughts	48
Appendix	49
Additional resources	57
Acknowledgements	57
Note from the author	58

Preface

In the restaurant industry, change is the only constant. For companies selling to restaurants, keeping up with that change is a constant challenge.

Restaurantology was founded in 2017 with a simple yet powerful idea: those selling to restaurants could achieve more with better data. Our mission was to build the most comprehensive, scalable, and valuable resource of restaurant industry data ever created.

In 2019, we expanded our offerings to include support services such as Go-to-Market (GTM) consulting and fractional Sales Ops. These services were designed to help businesses accelerate their speed-to-market by optimizing operational efficiencies.

Our mission at Restaurantology is to address two of the most common CRM challenges faced by restaurant tech B2Bs: inaccurate market data and the lack of relevant customizations, automations, and processes tailored for industry-specific sellers.

By 2024, Restaurantology has become the driving force behind the success of countless industry-leading restaurant tech companies. Our expertise in the restaurant industry, market trends, and data-driven GTM strategies powers the growth and innovation of organizations worldwide.

As you delve into this playbook, remember that each recommendation is made with purpose, each outcome is analyzed with precision, and each insight is provided to help you make informed decisions based on years of experience.

Here's to your journey of taking what you need, leaving what doesn't make sense right now, and activating a CRM that drives business growth and revenue at an enterprise scale.

Intro & expectation setting

Hello and welcome! I'm Grant Gadoci, and I specialize in helping B2B professionals create GTM strategies that are proven to grow businesses targeting the restaurant industry—faster and more predictably. If “operationalizing the systems and teams that sell to restaurants” piques your interest, I encourage you to continue reading.

My purpose...

Six years ago, I co-founded Restaurantology with the express purpose of transforming sales and marketing professionals into “restaurant industry experts.” I have a passion for market data and operations, and I thrive on earning conversations with businesses seeking to uncover revenue potential, grow their funnels, and empower their revenue teams with the data and systems they need to succeed.

This playbook is designed to provide valuable insights and proven strategies for B2B professionals who are building or refining Software-as-a-Service (SaaS) churn tracking for companies that primarily—but perhaps not exclusively—target restaurants.

My hope is that by the end of this playbook, you'll have a comprehensive 4-part solution template that we can consider our “desired outcome” or “success criteria.”

Please note: This playbook is not intended to solve churn issues, increase retention by a specific percentage, or provide a comprehensive solution for Customer Success Managers (CSMs) looking to fix restaurant tech churn once and for all. With my background in Operations, my focus is on solving the problem of churn tracking and analysis, rather than addressing the broader aspects of churn management.

Intended audience...

The primary audience for this playbook includes anyone with admin-level access to Salesforce, as this will be needed to implement the solutions recommended in this guide. This includes, but is not limited to, Sales Ops or Rev Ops team members, as well

as Business Development or Analyst roles who are confident enough to implement custom Salesforce solutions without breaking anything.

More broadly, anyone in the B2B restaurant tech space can benefit from the insights found herein—from standardized definitions to the infrastructure and architecture needed to scale an organization's churn tracking efforts at an enterprise level.

This playbook may also be valuable for executives, co-founders, or anyone with "growth" in their title. Essentially, it's for any professional directly or indirectly responsible for driving revenue, minimizing churn, or documenting internal processes or GTM strategies—whether for the first time or as a way to review, benchmark, or refine an existing plan.

Finally, regardless of your role or job function, this playbook is for anyone focused on how restaurant tech employees—whether they are quota-carriers, CSMs, or executives—learn about the industry, talk about the industry, and prepare to successfully serve an industry known for serving others.

My goal...

The ultimate goal of this playbook is to help you achieve something that took me over 10 years to figure out: **creating comprehensive CRM churn tracking reports in a reasonable amount of time, which drive positive business outcomes**. I have this knowledge, and I feel compelled—if not responsible—to share it with you.

To do that, I've structured this playbook with two specific objectives in mind:

1. Discuss what SaaS churn is, why tracking it is important, and why it's particularly challenging in the restaurant space.
2. Introduce a concrete, actionable blueprint designed to guide B2Bs targeting the restaurant industry through a 4-step churn reporting exercise—from aligning how we talk about churn, to tailoring an industry-specific solution in Salesforce, and ultimately building out the churn reports and dashboards needed to make data-driven decisions that drive business growth and retention.

One final thing...

Before we dive in, if we don't know each other, feel free to connect with me on LinkedIn. I regularly post blogs and other content covering GTM strategies, RevOps, and anything related to revenue R&D. All my content is based on over 20 years of experience in the trenches, learning about, perfecting, and obsessing over the most efficient ways to sell products and services into the restaurant industry.

If any of my experiences can be helpful to you or someone you know, please feel free to share my content with your friends, coworkers, or anyone who might be interested. Additionally, if you'd like to reach out to say hello or provide feedback that could make future content even more valuable, don't hesitate to email me at grant@restaurantology.io.

Let's get started.

The perks—and problems—with tracking churn

Tracking churn in the SaaS sector is a critical component of managing customer relationships and driving business growth. For restaurant tech companies, understanding churn is not just a necessity but a cornerstone of strategic planning. The volatile nature of the restaurant industry, high staff turnover rates, and the significant impact of churn on revenue make precise forecasting and resource allocation essential for maintaining a competitive advantage and ensuring customer satisfaction. Despite its importance, solutions for effectively tracking churn have lagged, often leaving businesses with fragmented or insufficient methods. This gap underscores the need for robust systems that simplify and enhance the overall churn tracking process.

Tracking churn isn't just about numbers; it's about gaining insights that empower strategic, data-driven decision-making at every level of the organization.

Before tackling the complexities of churn, it's crucial to establish a clear understanding and consensus within your organization. This involves defining churn in a way that aligns with the unique dynamics of the restaurant tech industry and ensuring these definitions are adopted company-wide. Our exploration of churn tracking will begin with a fundamental overview of what churn is and its significance, delve into the specific challenges faced by restaurant tech companies, identify common pitfalls in CRM churn tracking, and outline what an effective, sustainable solution might look like.

What is churn, and why is tracking it important?

In the SaaS world, churn refers to the rate at which customers discontinue their subscriptions to a service over a given period. Simply put, it's the percentage of customers who stop using the service within a specific timeframe. For restaurant tech companies, churn can manifest in various ways, such as restaurants canceling their subscriptions due to operational challenges, financial constraints, or dissatisfaction with the product.

Importance of tracking churn

Churn is a critical metric for SaaS companies as it directly impacts both revenue and growth potential. High churn rates indicate that a significant number of customers are leaving, which can hinder a company's ability to scale and achieve long-term success. Tracking churn is essential for several reasons:

1. **Revenue stability:** Churn affects the predictability and stability of revenue streams. High churn can lead to significant revenue loss, undermining the financial health of the company.
2. **Customer Lifetime Value (LTV):** Understanding churn is crucial for accurately calculating LTV, which is vital for setting marketing budgets and customer acquisition costs.
3. **Operational efficiency:** Insights from churn data can streamline operations by highlighting areas needing improvement, thereby optimizing resource allocation.
4. **Stakeholder confidence:** Regular tracking and reporting of churn rates build confidence among stakeholders, including investors, by demonstrating a company's commitment to maintaining and improving customer retention.

Benefits of tracking churn

Tracking churn is not just about knowing how many customers are leaving; it's about understanding why they are leaving and what can be done to prevent it. For sales strategy and forecasting, tracking churn offers several critical benefits:

1. **Revenue forecasting:** Accurate churn data helps predict future revenue streams by understanding the rate at which customers might leave. This is essential for creating realistic financial projections and making informed decisions about resource allocation and investment.
2. **Customer retention strategies:** By identifying patterns and reasons behind churn, companies can develop targeted strategies to improve customer retention. This might include enhancing customer support, improving product features, or offering tailored solutions to meet specific customer needs.
3. **Team alignment:** Understanding churn can help align sales and marketing efforts more effectively. If churn is high among a particular customer segment,

sales and marketing strategies can be adjusted to target more suitable prospects, while post-sales teams can focus on nurturing existing relationships to prevent churn.

4. **Product development:** Churn insights can drive product development by highlighting areas where the product may be lacking or not meeting customer expectations. This feedback loop ensures that the product evolves in line with customer needs and market demands.
5. **Competitive advantage:** In a competitive industry, minimizing churn can provide a significant edge. Companies that manage to retain more customers will have a steadier revenue base, enabling them to reinvest in further growth and innovation.

By tracking churn, SaaS companies can gain a comprehensive understanding of their customer base, anticipate challenges, and proactively address issues before they lead to customer loss. This holistic approach to churn management is essential for sustaining growth and achieving long-term success in the dynamic SaaS market.

Why churn tracking can be difficult for restaurant tech companies

Tracking churn in the restaurant tech industry presents unique challenges due to both external market dynamics and internal resource constraints. Understanding these challenges is essential for effectively managing churn and ensuring longstanding success.

External market dynamics

The restaurant industry is inherently volatile, with high staff turnover rates and frequent business closures. Seasonal fluctuations also play a significant role, as many restaurants experience peak seasons followed by slower periods. This volatility leads to poor product adoption, as new technologies are often deprioritized amidst the constant change and instability within the restaurant environment.

Additionally, the competitive landscape in the restaurant tech space is densely populated with companies offering similar features and solutions. This high signal-to-noise ratio can drive down perceived value and price, as restaurants have many options to choose from. Consequently, price wars and the commoditization of

features further complicate the perception of value versus cost, making it challenging for restaurant tech companies to retain customers.

[Read more: It's a competitive time to sell software to restaurants →](#)

As a result, churn reasons attributed to underlying market conditions—such as pricing, timing, and ownership changes—account for a significant portion of all documented churn in the industry. These factors not only contribute to higher-than-average churn rates for restaurant tech companies compared to other SaaS industries but also complicate internal churn reporting and tracking efforts, making it more challenging to maintain accurate and actionable data.

Internal resource constraints

Restaurant tech companies often face significant internal resource constraints that impact their ability to track churn effectively. High customer acquisition costs (CAC) necessitate efficient churn management to ensure that investments in acquiring new customers are not lost. However, limited resources often mean that teams are stretched thin, juggling multiple priorities and responsibilities. This can lead to insufficient focus on developing robust reporting systems and processes essential for accurate churn tracking.

These resource constraints impact more than just headcount; they often result in outdated or inadequate systems that fail to provide the necessary insights to combat avoidable churn. Without efficient processes and systems, tracking churn effectively and responding proactively to emerging trends becomes a challenge. Consequently, reporting, systems, and processes suffer, making it difficult to gain a comprehensive understanding of customer attrition and implement effective retention strategies.

Where most companies get churn tracking wrong

Strained resources, limited headcount, and inadequate systems can wreak havoc on churn reporting for restaurant tech companies. These challenges often lead to flawed or incomplete approaches to tracking churn, further complicating retention strategies and growth projections. Here, we explore the three most common mistakes companies make when attempting to track churn.

[01] External tracking: manual methods outside of the CRM

One prevalent mistake is tracking churn externally, outside of the Customer Relationship Management (CRM) system. This often involves manual processes, such as maintaining spreadsheets or using disparate tools to log churn data. While this method might seem manageable in the short term, it quickly becomes unsustainable as the company grows.

Tracking churn outside of your CRM leads to:

- **Inaccuracy**: Manual data entry is prone to errors, leading to inaccurate churn reporting.
- **Lack of scalability**: As the customer base expands, maintaining manual records becomes increasingly cumbersome and time-consuming.
- **Data silos**: Information stored outside the CRM leads to data silos, hindering a holistic view of customer behavior and making it difficult to identify patterns or trends.
- **Inefficiency**: Manual tracking requires significant time and resources, diverting attention from more strategic tasks.

Companies relying on external tracking methods often find themselves unable to keep up with the volume of data, resulting in outdated or incomplete churn reports.

[02] Partial tracking: churning subscriptions at the opportunity level in the CRM

Another common approach is tracking churn data within the CRM but only at the level where the deal was initially won. This method is not only frustrating but also fundamentally flawed, as it fails to account for the nuances and complexities of the restaurant industry. Specifically, opportunity-level churn tracking forces restaurant tech companies to specify a single churn date, disregarding the concept of partial churn entirely. Furthermore, it mandates a single churn reason, which inadequately captures scenarios such as franchise locations being acquired while other locations are shuttered.

Tracking churn solely at the opportunity level can lead to:

- Lack of granularity: Tracking churn only at the opportunity level misses compartmentalizable churn scenarios, providing an incomplete picture of customer attrition.
- Inconsistent data: Opportunities often reflect sales transactions rather than ongoing customer health, leading to inconsistencies in churn data.
- Inadequate insights: This approach fails to capture the full scope of customer interactions and dissatisfaction, limiting the ability to develop targeted retention strategies.

By not capturing partial churn, companies risk underestimating churn rates and overlooking critical signals of customer dissatisfaction.

[03] No reporting: failing to track churn altogether

The most detrimental mistake is not tracking churn at all. Some companies, overwhelmed by resource constraints or lacking proper systems, opt not to monitor churn. This approach is the worst option, as it leaves the company blind to one of the most critical indicators of business health.

Failing to track churn leads to:

- Unidentified issues: Without churn tracking, underlying issues that lead to customer attrition remain unnoticed and unaddressed.
- Revenue loss: Failing to track churn can result in significant revenue loss, as the company cannot proactively manage and mitigate customer departures.
- Strategic blind spots: Companies without churn data lack the insights needed to refine their sales and marketing strategies, putting them at a competitive disadvantage.
- Stakeholder mistrust: Inconsistent or absent churn reporting can erode trust with stakeholders, who rely on accurate data to assess the company's performance and growth potential.

Not tracking churn means missing out on crucial information that could help prevent customer loss and drive

Recap

The challenges of tracking churn in the restaurant tech industry are compounded by both external market dynamics and internal resource constraints. Whether it's the inefficiencies of manual external tracking, the limitations of opportunity-level tracking in CRM systems, or the complete absence of churn tracking, these common pitfalls hinder a company's ability to manage customer attrition effectively.

Understanding these flawed approaches highlights the urgent need for a more robust and scalable solution to SaaS subscription attrition. A comprehensive system that addresses the nuances of industry-related churn, integrates seamlessly with existing CRM tools, and provides actionable insights is essential for any restaurant tech company looking to maintain a competitive edge.

But what would such a holistic solution look like? We certainly have an idea—or at least know where we should start.

What a solution to churn tracking might look like

To effectively track churn in the restaurant tech space, it's crucial to customize your CRM to meet the unique needs of this industry. While some companies might immediately turn to external software integrated with their CRM for churn assistance (if you have the budget, do it!), we'll use the remaining chapters to work through our recommendation of a simplified yet tailored approach to building out version 1 (v1) churn tracking in your CRM.

The crux of our solution is built around introducing a custom object, referred to hereafter as "Subscription" or "Subscriptions," purpose-built to better manage the nuances of the restaurant industry. With proper automation and a commitment to ongoing ownership and upkeep, these CRM Subscriptions will help any organization transition to subscription-level churn, establishing a one-to-many (1:n) relationship that provides a more detailed and accurate view of customer attrition.

Introducing a custom object

The Subscription object is designed to encapsulate all the details necessary for comprehensive churn tracking. It enables detailed tracking of churn dates over time, churn reasons by product and location, and ties churn data to specific factors such as product type, industry segment, or restaurant service type. This customized approach helps us understand not just if customers are leaving, but why—and how to address those specific issues if or when necessary.

Key benefits of the Subscription custom object include:

- **Granular tracking**: Allows for detailed logging of churn events, capturing multiple churn dates and reasons across different products and locations.
- **Enhanced insight**: Helps identify patterns and trends in churn, linking them to specific products or market segments.
- **Improved accuracy**: Reduces errors and inconsistencies compared to opportunity-level tracking, providing a clearer picture of customer attrition.
- **Scalability**: Ensures that as the customer base grows, the system can handle increased data volume without sacrificing accuracy or usability.

Implementing this solution requires a strategic approach, focusing on aligning terminology, customizing the CRM, and building robust reporting tools. The remaining chapters of this guide will delve deeper into each of these aspects.

Our path forward

Here's a preview of our recommended 4-part guide to build out the MVP version of CRM subscription management:

- **Part 1: Aligning how we talk about churn** - To ensure everyone in the organization is on the same page, it's crucial to standardize the terminology and definitions used for churn. This alignment helps in creating a cohesive strategy and ensures that all stakeholders understand the metrics and their implications.
- **Part 2: Tailoring Salesforce for custom churn tracking** - Customizing Salesforce to include a Subscription object is the next step. This part will cover the technical aspects of creating and maintaining the Subscription object, ensuring it captures all necessary data points for effective churn tracking.

- Part 3: Building reports and dashboards for strategic decision making - Once the Subscription object is in place, it's essential to build out comprehensive reports and dashboards. These tools will summarize churn details and provide actionable insights, enabling data-driven decisions that can improve customer retention and drive business growth.
- Part 4: Drawing insights and refining strategies - In the final step, we'll focus on leveraging the data collected and visualized in your reports and dashboards. This part will guide you through the process of analyzing churn patterns, identifying key drivers of customer attrition, and refining your customer retention strategies based on these insights.

Conclusion

Creating a custom Subscription object in your CRM is a powerful solution for addressing the challenges of churn tracking in the restaurant tech industry. This approach allows for more detailed and accurate tracking, helping companies better understand and address customer attrition. In the following chapters, we will explore the steps needed to implement this solution, from aligning terminology to customizing Salesforce and building strategic reports and dashboards. By doing so, we aim to provide a comprehensive guide to managing churn effectively and driving long-term success.

Part 1 - Aligning how we talk about churn

To implement a robust churn tracking solution in our CRM, we must first normalize and standardize key subscription-level fields and definitions across the organization. While this foundational step may seem tedious, it is essential for ensuring a clear and consistent understanding among all team members. Aligning on these definitions not only fosters clarity but also paves the way for more efficient system adoption and accurate churn data interpretation. This shared understanding is crucial for better decision-making, improved retention strategies, and a cohesive approach to managing customer relationships.

Top 5 essential fields for comprehensive subscription tracking

To effectively manage all subscriptions—whether active or churned—it's important to ensure each Subscription contains five core components:

1. Global Parent (Account lookup): The highest-level business or organization that holds the subscription. This entity represents the overarching relationship, providing critical insights into the broader customer structure.
2. Location (Account lookup): The specific restaurant or location (often referred to as the "store") that utilizes the subscription. This field enables granular tracking of service usage, which is particularly important for businesses with multiple locations.
3. Responsible Party (Account lookup): The individual or entity responsible for payment and overall account management. This could be the Global Parent, the Location, or a separate Account, such as a franchisee. Identifying the Responsible Party ensures proper billing and relationship management.
4. Opportunity (Opportunity lookup): The initial deal that generated the subscription, providing context on how and why the subscription was acquired. Understanding this opportunity offers insights into customer expectations and initial sales strategies.
5. Product (Product lookup): The specific service or solution subscribed to, along with its Monthly Recurring Revenue (MRR) price. This field is essential for

tracking the financial impact of each subscription and understanding the product mix used by the customer.

These fields should be mandatory, ensuring that every subscription is captured with sufficient detail to allow users to easily infer critical information about the subscription's origin, the number of subscriptions held by a parent or location, and other key metrics. This structured approach not only enables comprehensive tracking and management of subscriptions but also sets the stage for deeper analysis and strategic insights, which we'll explore further in Part 3.

The 4 critical fields to accurately define churn

For effective churn tracking at the subscription level, we must go beyond the five core fields and introduce, define, and, when appropriate, require users to tag subscriptions with the detailed information necessary to fully understand customer behavior.

[01] Subscription Status

To accurately track churn at the subscription level, it's crucial to introduce a "Subscription Status" field. This picklist categorizes the various stages of a subscription, providing a clear and structured framework for managing and analyzing customer attrition. We recommend the following values for "Subscription Status":

- **Implementation:** The default status when a subscription is first created and is in the process of being set up.
- **Active:** The subscription is fully operational, the customer is actively using the service (or at a minimum has access to the software or product), and payments are presumed to be made regularly.
- **On hold:** The subscription is temporarily paused, the customer is not currently using the service (access should be limited or removed entirely), and payments are suspended or at risk. This status is used when a subscription is paused based on customer feedback, possibly due to seasonal closures or temporary issues. It may also apply when internal issues arise that prevent the customer from deriving value from the product or service, such as a stalled or poorly functioning integration.

- **Churned:** The subscription has been terminated, the customer is no longer using the service, and payments have ceased.
- **Replaced:** The subscription has been replaced by a new service, potentially involving changes in the product or term, and the price may have increased or decreased accordingly. This status isolates subscriptions that are no longer active but should not be included in churn reporting.

Examples to illustrate these statuses:

1. **On hold:** Four locations purchase software. During the implementation phase, three locations successfully "go live," but the fourth fails to attend the group training and becomes unresponsive to follow-up calls and emails.
2. **Churned:** Two locations purchase both a core product and an optional add-on, resulting in four active subscriptions. During the renewal period, the customer states the add-on is not providing value and opts to remove it immediately.
3. **Replaced:** A 30-unit customer is up for renewal, and a 4% year-over-year price increase, or "lift," is applied to the product per their renewal agreement.

These statuses allow for detailed monitoring of each subscription's lifecycle, providing valuable insights into the customer journey from onboarding to potential churn.

[02] Churn Date

A critical aspect of churn tracking is capturing the exact date when a subscription is either churned or replaced. The "Churn Date" field is essential for this purpose and should have a field validation rule that requires its entry when the "Subscription Status" is set to either "Churned" or "Replaced." This ensures precise data on when attrition events occur, which is vital for analyzing trends, timing, as well as calculating metrics for Lifetime Value (LTV) and Net Revenue Retention (NRR).

It's important to note that the "Churn Date" can also be set in the future if a customer announces their intention not to renew ahead of time. This proactive approach allows us to anticipate churn, forecast accordingly, and potentially implement retention strategies before the subscription officially ends.

[03] Churn Reason

To understand the underlying causes of churn, it's essential to assign a "Churn Reason" to each churned subscription. This field categorizes the primary reason why the customer decided to terminate their subscription. We have identified seven core categories to outline the majority of restaurant-specific churn reasons:

1. **Product:** Issues related to the product itself, such as bugs, poor performance, or missing features.
2. **Relevance:** The product no longer meets the customer's needs or is no longer relevant to their business.
3. **Value:** The customer perceives that the product does not provide sufficient value relative to its cost.
4. **Usage:** The customer struggles with adopting or fully utilizing the product.
5. **Services:** Issues related to post-sales teams like customer support, onboarding, or other professional services.
6. **Market Dynamics:** External factors such as competitive pressures, economic shifts or downturns, or regulatory changes.
7. **Operational:** Internal business operations issues, such as changes in ownership or strategic shifts.

Within these seven categories, we've identified 20 specific churn reasons, each correlated to one of the categories mentioned above.

Category	Churn Reason	Category	Churn Reason
Product	→ Product Issues	Market Dynamics	→ Pricing / Finances
Product	→ Feature / Functionality	Market Dynamics	→ Closed Business
Relevance	→ Not a Good Fit	Market Dynamics	→ New Ownership
Relevance	→ No Longer Need	Market Dynamics	→ Timing
Value	→ Lack of Value	Market Dynamics	→ External Forces
Value	→ Lack of Desired Outcome		

Category	Churn Reason	Category	Churn Reason
Usage	→ Lack of Adoption	Operational	→ Cancellation via Partner
Usage	→ Lack of Engagement	Operational	→ Non-payment
Services	→ Onboarding Issue	Operational	→ Customer Dismissal
Services	→ Support Issue	Operational	→ Other
Services	→ Success Issue		

Note: for detailed definitions and explanations, refer to the [Appendix](#).

Whether your company decides to implement some or all of our Churn Reason recommendations, these definitions will help ensure consistent usage across the organization and make it easier to incorporate them into your processes and documentation.

Lastly, in addition to the agreed-upon picklist values, some companies may opt to include a secondary “Churn Reason - Detail” free-text field. This allows for capturing anecdotal information and specific nuances behind each churn decision, providing a deeper level of understanding that can inform more targeted retention strategies.”

[04] Churn Competitor

While it’s important to know if a customer has moved to a competitor, it’s crucial to capture the underlying reasons such as pricing, features, or service quality. Therefore, “Competitor” should not be a primary Churn Reason.

Instead, we recommend using a separate Account lookup field to identify and memorialize the competitor responsible for the customer attrition. This approach ensures that the primary Churn Reason accurately reflects the customer’s motivations, while still tracking competitive dynamics wherever applicable.

Conclusion

By establishing these four critical fields—Subscription Status, Churn Date, Churn Reason, and Churn Competitor—you create a structured framework for understanding

and tracking churn at the subscription level. This approach ensures clarity and consistency while equipping your organization with the insights needed to drive strategic decision-making and enhance customer retention. In the next part of this playbook, we'll delve into how to tailor Salesforce (SFDC) for dedicated churn tracking, ensuring that these standardized definitions are effectively implemented within your CRM.

Part 2 - Tailoring Salesforce for churn tracking

Effectively tracking churn within a SaaS organization requires more than just standardized definitions and processes; it demands a tailored approach that integrates seamlessly into your existing CRM infrastructure. Salesforce, with its robust customization capabilities, offers an ideal platform for developing a comprehensive churn tracking solution. However, to truly leverage Salesforce's potential, it's crucial to build a custom object that reflects your business's unique needs, introduce automations that reduce manual workload, and assign ownership to ensure ongoing success.

In this chapter, we'll guide you through the process of customizing Salesforce specifically for churn tracking. We'll start by discussing how to build out a custom object designed to capture all the necessary subscription-level details. Then, we'll explore how to implement automations that streamline your churn management processes, and finally, we'll cover the importance of assigning ownership to maintain and continuously improve your churn tracking efforts. By the end of this chapter, you'll have a clear roadmap for turning Salesforce into a powerful tool for managing and reducing churn.

Step 1: Building out your custom object

The first step in tailoring Salesforce for churn tracking is to build a custom object specifically designed to manage and monitor subscriptions. This object will serve as the foundation for all churn-related data, enabling you to track the lifecycle of each subscription and gain insights into customer behavior.

1.1 Create your custom object

To begin, navigate to Salesforce's Object Manager and select "Create Custom Object." Here, you'll define the singular and plural name of the object (e.g., "Subscription" and "Subscriptions").

For the Record Name, we recommend using "Subscription Number" and selecting the Auto Number data type with a display format like "SUB-{{000000}}." Depending on your

anticipated record volume, consider additional characters beyond the six recommended above to ensure scalability.

Additional considerations:

- Optional Features > Allow Reports = YES
- Optional Features > Track Field History = YES
- Search Status > Allow in Search = NO
- Deployment Status > Deployed = YES
- Object Creation Options > Add Notes and Attachments to page layout = YES
- Object Creation Options > Launch New Custom Tab Wizard on save = YES

Once saved, you'll be prompted to select the Tab Style by choosing an icon for your newly created Subscription custom object. Consider selecting an icon that aligns with your team's workflow and the object's purpose.

Finally, ensure the new tab is added to your default navigation bar at the top of the page. If not, click the pencil icon on the navigation bar to add or edit default tabs.

1.2 Establish key lookup relationships and design core fields

After creating the custom object, the next step is to establish the appropriate lookup relationships and design the core fields necessary for comprehensive subscription tracking.

As covered in Part 1, five critical lookup relationships with other Salesforce objects are strongly recommended, if not mandatory, for every subscription in your CRM:

1. **Global Parent** → Account lookup (Master-Detail)
2. **Location** → Account lookup
3. **Responsible Party** → Account lookup
4. **Opportunity** → Opportunity lookup (required)
5. **Product** → Product lookup (required)

Important Note: Ensure that the Global Parent field is set up with a Master-Detail (Account) relationship with your Subscription custom object. This relationship is crucial, as future reporting recommendations will rely on this configuration.

These relationships ensure that subscription data is cross-referenced and flows seamlessly across your CRM, linking subscriptions to specific customers, sales deals, and product offerings.

In addition to these key lookup fields, incorporate fields for MRR, Annual Recurring Revenue (ARR), and Subscription Notes. These fields provide essential financial data and context, helping you understand each subscription's revenue impact and specifics.

For a complete list of all recommended Subscription fields, including field types and sample values, please refer to the [Appendix](#) of this playbook.

1.3 Consider relevant field validations

With the primary fields created, it's essential to enhance the accuracy and reliability of your churn tracking by implementing field validations that enforce data integrity.

Here's how you can apply field validations:

- On record creation: Global Parent, Opportunity, and Product fields should be required to ensure that the most fundamental relationships are established from the outset.
- Subscription Status set to Active: When the Subscription Status is set to Active, make Location and Responsible Party fields mandatory to capture key information about where the subscription is utilized and who is responsible for payment.
- Subscription Status set to Churned: If the Subscription Status is changed to Churned, all relevant churn-related fields, such as Churn Date and Churn Reason, should be required to ensure comprehensive documentation of why and when the churn occurred.

- **Churn Reason set to Feature / Functionality:** If Churn Reason is set to Feature/Functionality, the Churn Reason - Detail field should also be required to provide additional context and specifics, offering deeper insights into the reason for churn.

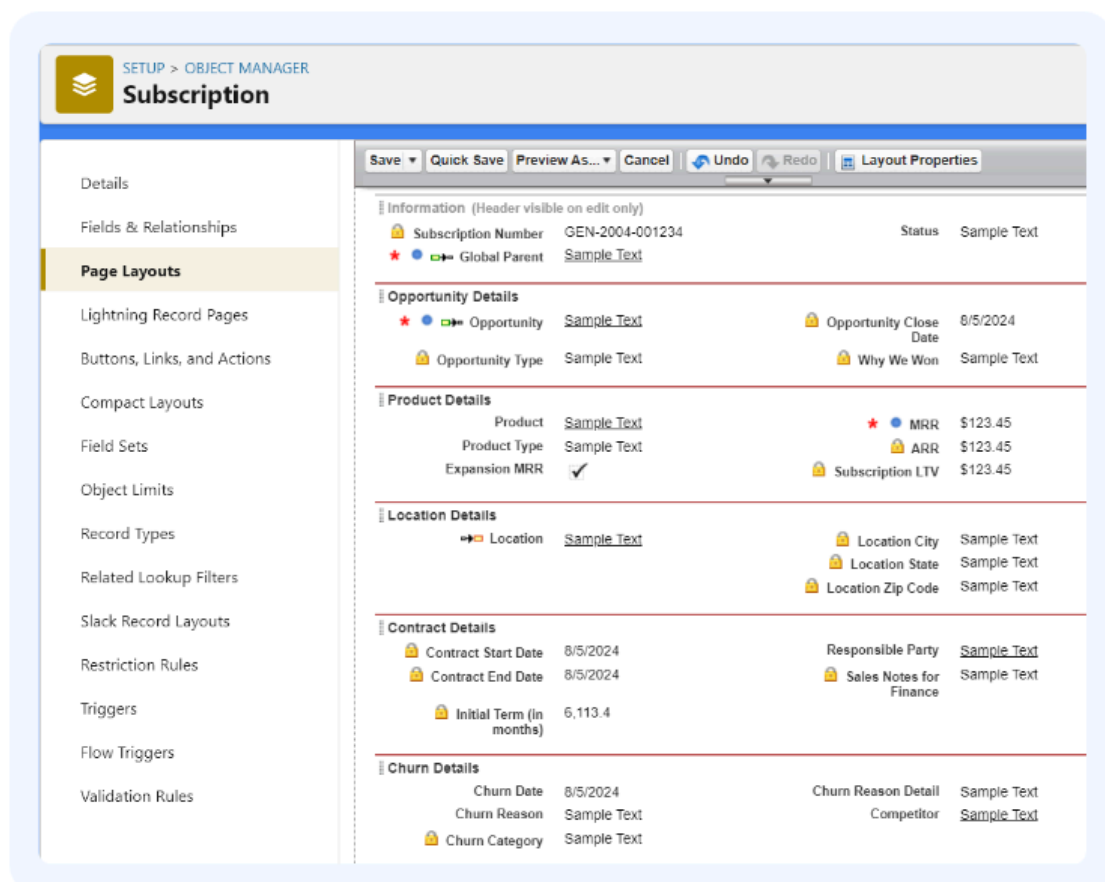
Implementing these field validations helps maintain data quality, ensuring that your churn tracking is as precise and reliable as possible. Capturing all necessary details at the appropriate times equips your team with the accurate data needed to make informed decisions and effectively manage customer retention.

1.4 Update the default subscription page layout

After defining your fields and setting up validations, it's crucial to update the default page layout for the Subscription object to maximize efficiency and usability.

FIGURE 1

Subscription page layout (recommendation)



A well-organized page layout greatly enhances the user experience, making it easier to input and access data. Consider creating dedicated sections within the layout—one for each of the five related lookups, along with specific sections for Contract details and Churn information. This structure not only keeps the page clean and organized but also ensures that all relevant information is logically arranged and easily accessible.

To help visualize this setup, we've included an image (above) as a frame of reference. This potential page layout serves as a guide, illustrating how you might structure the sections to optimize data entry and retrieval in your Salesforce environment.

1.5 Create initial Subscription list views

One final consideration is to create initial list views for your Subscriptions. List views allow your team to quickly access and filter relevant subscription data, making it easier to manage and analyze customer information.

Start by creating basic list views that segment subscriptions based on key criteria, such as "Active Subscriptions," "Churned Subscriptions," and "Subscriptions On Hold." Additionally, consider creating a list view for "Upcoming Renewals" to help your team proactively manage renewals and reduce churn.

Note: This can be achieved rather easily by creating subscription-level formula fields that extract relevant Opportunity details such as effective date, initial term (in months), and calculating the forecasted renewal date. This ensures that your list views are dynamic and informative, offering real-time insights.

Customizing these list views not only enhances usability but also ensures that your team can easily monitor and respond to critical subscription activities. These initial list views will serve as a foundation that you can build upon as your churn tracking processes evolve.

Recap

If you've made it this far, you've established a solid foundation in Salesforce tailored specifically for managing and tracking subscriptions. This customized setup, with well-defined fields, robust relationships, and a structured page layout, will serve as the

backbone of your churn tracking efforts. It enables your team to accurately capture and analyze the lifecycle of each subscription, providing valuable insights into customer behavior and attrition.

In the next step, we'll explore how to begin incorporating subscriptions into related objects.

Step 2: Incorporating subscriptions into related objects

Integrating your newly created Subscription custom object into related Salesforce objects is essential for ensuring that subscription data is visible and actionable throughout your CRM. By updating the Opportunity and Account page layouts and incorporating roll-up fields at the Account level, you can create a more cohesive and insightful view of your customer relationships. This step is crucial for leveraging subscription data to inform sales strategies, customer success initiatives, and overall business intelligence.

2.1 Update Opportunity page layout

The first step in incorporating subscriptions into related objects is updating the Opportunity page layout. This ensures that your sales team has immediate visibility into any related subscriptions when reviewing or managing won deals. By adding a related list for Subscriptions on the Opportunity page layout, users can easily track which subscriptions were generated by the Opportunity, monitor their status, and assess their performance.

To do this, navigate to the Opportunity page layout in Salesforce and add the Subscriptions related list. Position this list prominently on the page to ensure it's readily accessible. This update allows your sales team to quickly assess the status of related subscriptions directly from the Opportunity record, streamlining their workflow and enhancing their ability to manage customer relationships effectively.

2.2 Update Account page layout

Next, update the Account page layout to include the Subscription custom object. This step is critical for providing a holistic view of all subscriptions associated with an

Account, enabling your team to better understand the customer's overall engagement and subscription history.

Add the Subscriptions related list to the Account page layout, ensuring it is easy to find and use. This addition allows users to view all subscriptions linked to the Account, including their status, MRR, and other key details. Integrating subscriptions at the Account level provides your team with the insights they need to make informed decisions, whether they're managing renewals, addressing customer issues, or planning upsell strategies.

FIGURE 2

Account page layout recommendation

The image shows a Salesforce account page layout with two related lists for Subscriptions. The top list is titled "Subscriptions (Parent) (6)" and the bottom list is titled "Subscriptions (Location) (6)". Both lists show columns for Subscription Number, Status, Location, Product, MRR, and Subscription LTV. The right sidebar shows configuration options for sorting and filtering these lists.

Subscription...	Status	Location	Product	MRR	Subscription LTV
1 Sample Text	Sample Text			123.45	123.45
2 Sample Text	Sample Text			123.45	123.45
3 Sample Text	Sample Text			123.45	123.45
4 Sample Text	Sample Text			123.45	123.45
5 Sample Text	Sample Text			123.45	123.45
6 Sample Text	Sample Text			123.45	123.45

Subscription Number	Status	Product	MRR	Subscription LTV
1 Sample Text	Sample Text		123.45	123.45
2 Sample Text	Sample Text		123.45	123.45
3 Sample Text	Sample Text		123.45	123.45
4 Sample Text	Sample Text		123.45	123.45
5 Sample Text	Sample Text		123.45	123.45
6 Sample Text	Sample Text		123.45	123.45

Sort field: Default

Sort Order: Default

Related List Filters: Add Filter

Actions: Add Action

Set Component Visibility: Filters

- 1 Record > Account Record Type > Name Contains Parent
- 2 Record > Account Record Type > Name Contains Sub-parent

Show component when: All filters are true

Recommendation: If your organization distinguishes between Parent accounts and Store (or Location) accounts using Account Record Types, consider tailoring the related Subscriptions lists accordingly, as shown in the image above. You can tie the visibility of these related lists to the appropriate record type, ensuring that the relevant subscriptions are displayed for each account type.

2.3 Adding Account-level rollup fields

To further enhance visibility into subscription data, consider creating Account-level rollup fields. These fields aggregate key metrics from the related Subscriptions, providing at-a-glance insights into the Account's overall subscription health and financial impact.

Recommended rollup fields include:

- Count of Active Subscriptions: Tracks the total number of active subscriptions associated with the Account.
- Sum of Active Subscription MRR: Aggregates the total MRR from all active subscriptions.
- Count of Subscriptions in Implementation: Monitors the number of subscriptions currently in the implementation phase.
- Sum of MRR in Implementation: Aggregates the MRR from subscriptions that are still being implemented.
- Count of Subscriptions On Hold: Tracks the number of subscriptions that are temporarily paused.
- Sum of MRR On Hold: Aggregates the MRR from subscriptions that are currently on hold.
- Count of Churned Subscriptions: Counts the total number of churned subscriptions for the Account.
- Sum of Churned MRR: Aggregates the total MRR lost due to churned subscriptions.

These rollup fields provide valuable metrics that can be used in reporting and dashboarding, helping your team quickly assess the overall health and performance of each Account's subscriptions. Incorporating these fields allows for a deeper understanding of your customer base, identifying potential risks, and uncovering opportunities for growth.

Recap

Incorporating your Subscription custom object into related Salesforce objects is a vital step in maximizing the value of your churn tracking efforts. By updating the Opportunity and Account page layouts and adding Account-level rollup fields, you

ensure that subscription data is fully integrated into your CRM. This integration enhances visibility, improves data-driven decision-making, and ultimately supports better customer retention and growth strategies.

In the next step, we'll explore how to introduce automations to streamline processes and further reduce manual workload.

Step 3: Introducing automations to reduce workload

Implementing automation in Salesforce is a powerful way to streamline processes, reduce manual workload, and ensure consistency in your churn tracking efforts. By automating key actions related to subscriptions, you can free up your team's time to focus on more strategic tasks while maintaining accurate and up-to-date records. In this section, we'll explore several critical automations that can significantly enhance your churn management processes.

3.1 Automation: Subscription(s) created from Won Opportunity

One of the most impactful automations you can implement is creating subscriptions automatically when an Opportunity is marked as Closed Won. This Flow will generate the necessary subscriptions (in a 1:n relationship) directly from the Opportunity, pulling in essential data such as quantity, MRR, and other key values.

Considerations:

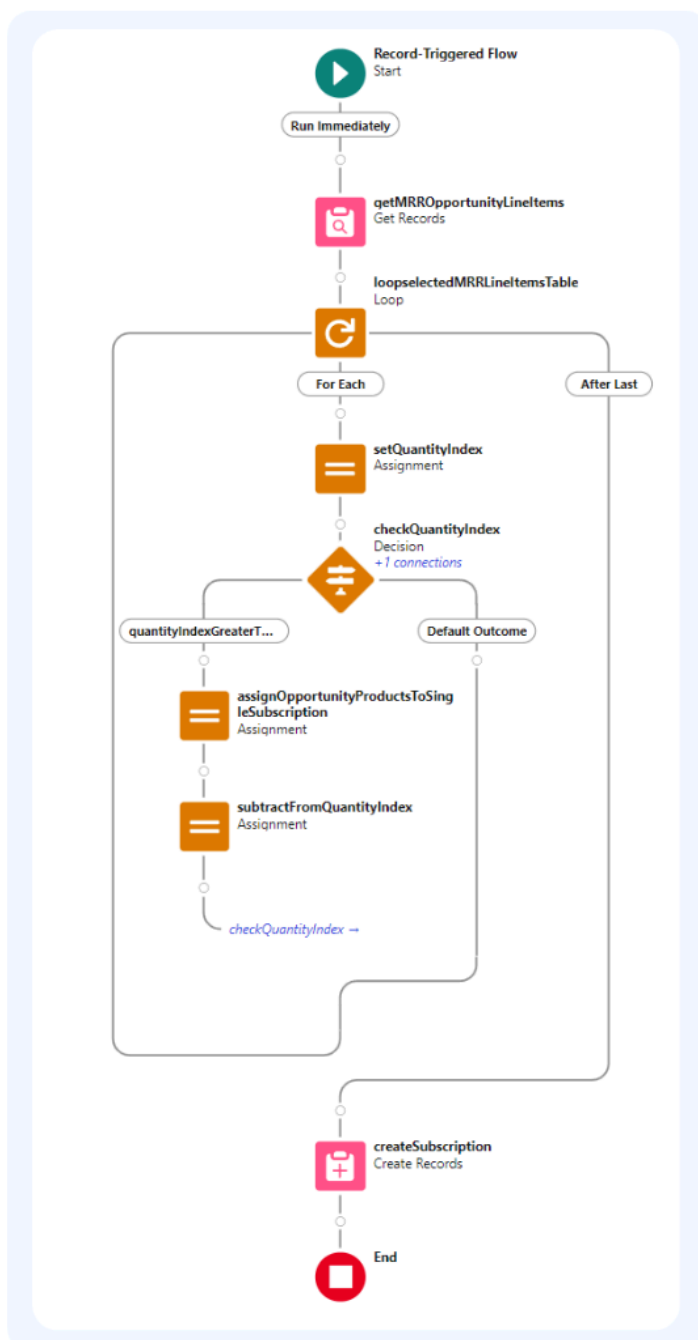
1. Opportunity Stage Set to Closed Won: This is a common Flow automation trigger, and this Flow can be expanded to perform other actions, such as updating the Opportunity's related Account to "Customer," generating onboarding projects, or sending alerts about newly won business.
2. Non-Recurring Line Items: Not all Opportunity Products may require subscriptions. To manage this automation effectively, you'll need two additional fields:
 - Product > Revenue Type: A picklist field with options such as "One-time" and "Recurring."
 - Opportunity Product > Revenue Type: A text formula field that pulls the Revenue Type from the Product object using the formula below:

```
TEXT (PricebookEntry.Product2.Revenue_Type__c)
```

Below you'll find an image that provides a wide-lens view of the structure of the subscription generation Flow. For a detailed, step-by-step guide to building this automation—including variables, decisions, loops, and arrays—refer to the [Appendix](#).

FIGURE 3

Sample outline for Subscription creation via Flow automation



Note: If you encounter any difficulties or need guidance on creating this relatively complex Salesforce Flow automation, don't hesitate to contact Restaurantology for assistance.

3.2 Automation: Added Subscription Location updates "Account Type" to Customer

This Flow is triggered when a new Location (or Store) is added to an existing Subscription, typically during the implementation phase. Provided the Subscription's status is not set to "Churned" or "Replaced," the Flow should automatically update the related Location's Account Type to "Customer."

This automation helps keep track of which locations within the Global Parent's hierarchy are actively using a product or service, reducing the need to manually check each individual Store's account.

3.3 Automation: Subscription Churn updates Related Account(s) "Account Type"

To ensure that your Account data accurately reflects customer status, this Flow is designed to update the Account Type to "Lost Customer" when the last active Subscription for a Global Parent and/or a Location is churned.

This automation should be configured to trigger when the Subscription Status is set to "Churned." The Flow should consist of two separate loops: one fetching related Active Subscriptions for the Global Parent and another for the Location. In each loop, the Flow should ignore the Subscription record that triggered the automation, focusing only on other active Subscriptions linked to the same Account.

If either loop fails to return any remaining Active Subscriptions—whether for the Global Parent or the Location—the corresponding Account should be updated to "Lost Customer." This means that if the Location no longer has any active Subscriptions, only the Location's Account Type will be updated to "Lost Customer." Meanwhile, if the Global Parent still has active Subscriptions associated with other Locations, its Account Type will remain unchanged. This approach ensures that only the relevant accounts are updated, accurately reflecting the current state of customer engagement at both the Location and Global Parent levels.

By automating this process, you reduce the risk of overlooking key changes in customer status, enabling your team to maintain a more accurate and up-to-date view of customer health across all accounts.

3.4 Alert: Change in Subscription Status sends Notification(s)

To keep relevant team members informed, set up automations that trigger notifications when a Subscription's status changes. For example, an "Active" status could alert the finance team that the client is ready to be billed, while changes to "Churned" or "On Hold" could notify the appropriate post-sales team, prompting timely follow-up and retention efforts.

Note: If you are creating Salesforce Flows that send Slack alerts through Slack for Salesforce, ensure that the channel you plan to publish to is set to public. Private channels can trigger "Channel not found" errors during debugging, which may disrupt the effectiveness of your automation.

Recap

By introducing these automations, you'll significantly reduce the manual workload associated with managing subscriptions and ensure that your Salesforce data remains accurate and up-to-date. These automated processes not only enhance efficiency but also provide real-time insights and notifications that help your team stay proactive in managing customer relationships. In the next chapter, we'll focus on how to leverage these automations and customizations to build powerful reports and dashboards that drive strategic decision-making.

Step 4: Assigning ownership for ongoing success

Your CRM should be your company's definitive "source of truth," capturing every aspect of your operations, including churn processes. However, achieving this level of accuracy and reliability requires a firm commitment from all internal stakeholders to ensure that every facet of churn tracking is meticulously documented and maintained within your system of record.

Our recommendation to use a custom object for tracking subscription churn at an enterprise scale offers tremendous insight and detail, but its effectiveness hinges on a dedicated commitment to maintaining and updating the system. This entire framework will only succeed with consistent documentation of store-level subscriptions and careful tracking of subscription attrition.

Below are several recommendations to help your internal teams prioritize and adopt the strategies outlined in this chapter.

4.1 Set clear roles and responsibilities

To ensure the success of your churn tracking system, it's essential to clearly define the roles and responsibilities of each team member involved in the process. This includes everyone from data entry personnel to analysts tracking churn trends and strategists developing retention plans. Incorporating these responsibilities into job descriptions ensures that ownership is clearly identified, and any gaps in accountability can be promptly addressed. Clear role definitions streamline the process, ensuring that each team member understands their specific duties and the importance of their contributions to the overall system.

4.2 Commit to centralized, exhaustive documentation

A critical factor in maintaining the effectiveness of your churn tracking system is having centralized and comprehensive documentation. There should never be any ambiguity about which Churn Reason to select, what fields are required or trigger automations, or how processes are intended to flow. This documentation should be easily accessible and regularly updated to reflect any changes in procedures or system configurations. By committing to thorough documentation, you ensure that all users have a clear understanding of the system and can contribute effectively to its upkeep.

Note: If you haven't yet created your internal documentation, or if your existing resources need enhancement, remember that the [Appendix](#) of this playbook is designed to support you in building or refining your internal resources. Use it as a foundation to establish or update your documentation effectively.

4.3 Schedule regular audits

Regular audits are essential for ensuring that your churn tracking process remains accurate and relevant. These audits should evaluate both the data and the processes used to capture and analyze churn. By identifying discrepancies or inefficiencies, you can make necessary adjustments to improve the system's performance. Audits also provide an opportunity to refine your documentation and training programs based on real-world use, ensuring that your churn tracking remains effective as your business evolves.

4.4 Provide ongoing training

Continuous training and support are vital for keeping all users aligned and up to date with any changes or improvements in the churn tracking process. Regular training sessions should be scheduled to reinforce best practices, introduce new functionality, and ensure that everyone is comfortable with the system. This ongoing education helps prevent data entry errors, ensures consistent use of the system, and empowers your team to fully leverage the churn tracking tools at their disposal.

4.5 Incorporate feedback loops

Incorporating feedback loops with employees responsible for documenting churn is essential for continuous improvement. By regularly gathering input from the team members who interact with the system daily, you can identify areas for improvement and make iterative changes that enhance reporting accuracy and efficiency. These feedback loops ensure that the system remains user-friendly and effective, adapting to the needs of your business and the insights gained from ongoing usage.

Recap

Assigning clear ownership and responsibilities, committing to thorough documentation, conducting regular audits, providing ongoing training, and incorporating feedback loops are all critical to the long-term success of your churn tracking system. By following these steps, you ensure that your Salesforce environment remains a reliable source of truth, capable of providing the insights needed to manage churn effectively and drive strategic decisions. In the final chapter, we'll focus on leveraging the customizations and automations we've discussed to build powerful reports and dashboards that inform and guide your business strategy.

Part 3 - Building reports for churn tracking

In this section, we'll explore how to build a v1 reporting stack using the custom Subscription object created in Part 2. The primary goal is to establish a comprehensive reporting system that can be utilized across departments and shared with investors or board members eager to track company performance. Once agreed upon, these reports and dashboards can be scheduled for regular exports to better monitor churn metrics, providing real-time insights to sales, customer success, and leadership teams.

Top 3 ways to report on churn in your CRM

While there are countless intersections of churn data that can derive valuable insights for your business, three reporting approaches stand out as particularly effective: reporting on churn by date, by reason, and by market segment.

[01] Grouping churn by "Churn Date"

One of the most straightforward and essential ways to report on churn is by grouping it by "Churn Date."

FIGURE 4

Sample report grouping MRR subscription churn by Churn Date

Report: Accounts with Subscriptions MRR Churn - CQ										
Total Records		Total MRR								
268		\$24,424.00								
Contract Start Date	Churn Date →	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024	August 2024	Total
<input type="checkbox"/> CY2019	Sum of MRR Record Count	\$0.00 0	\$0.00 0	\$0.00 0	\$0.00 0	\$223.00 3	\$0.00 0	\$0.00 0	\$0.00 0	\$223.00 3
<input type="checkbox"/> CY2020	Sum of MRR Record Count	\$99.00 1	\$125.00 1	\$0.00 0	\$236.00 2	\$0.00 0	\$0.00 0	\$0.00 0	\$0.00 0	\$460.00 4
<input type="checkbox"/> CY2021	Sum of MRR Record Count	\$529.00 5	\$176.00 2	\$608.00 8	\$129.00 2	\$621.00 7	\$594.00 6	\$77.00 1	\$0.00 0	\$2,734.00 31
<input type="checkbox"/> CY2022	Sum of MRR Record Count	\$452.00 5	\$790.00 9	\$508.00 7	\$398.00 5	\$326.00 6	\$333.00 15	\$538.00 6	\$237.00 3	\$3,582.00 56
<input type="checkbox"/> CY2023	Sum of MRR Record Count	\$1,087.00 16	\$4,123.00 41	\$1,144.00 10	\$1,402.00 12	\$1,148.00 18	\$2,252.00 24	\$1,154.00 11	\$1,233.00 11	\$13,543.00 143
<input type="checkbox"/> CY2024	Sum of MRR Record Count	\$0.00 0	\$0.00 0	\$310.00 2	\$190.00 3	\$652.00 6	\$1,997.00 12	\$503.00 6	\$230.00 2	\$3,882.00 31
Total	Sum of MRR Record Count	\$2,167.00 27	\$5,214.00 53	\$2,570.00 27	\$2,355.00 24	\$2,970.00 40	\$5,176.00 57	\$2,272.00 24	\$1,700.00 16	\$24,424.00 268

Ensuring that all churned subscriptions have an associated churn date, whether backdated or entered at the time of cancellation, is crucial. Salesforce's powerful reporting tools allow you to group this data by various timeframes—such as week, month, quarter, and year—providing a clear picture of churn trends over time.

This method allows you to answer key questions like:

- How has churn fluctuated over different time periods?
- Are there any seasonal patterns in churn?
- How does the current period's churn compare to previous periods?

[02] Summarizing churn by “Churn Reason” (or Category)

Understanding why customers churn is just as important as knowing when they churn. Summarizing churn by reason or category allows you to identify the underlying factors driving customer attrition. This approach helps assess which churn reasons are most prevalent and, critically, distinguish between churn that is avoidable and unavoidable.

FIGURE 5

Sample report summarizing MRR subscriptions by Churn Reason

Report: Accounts with Subscriptions		MRR Churn - CQ					
Total Records	Total MRR						
322	\$28,578.00						
Churn Reason	Churn Category	Market Dynamics	Operational	Product	Relevance	Value	Total
<input type="checkbox"/> Closed Business	Sum of MRR Record Count	\$7,968.00 104	\$0.00 0	\$0.00 0	\$0.00 0	\$0.00 0	\$7,968.00 104
<input type="checkbox"/> Did Not See Value	Sum of MRR Record Count	\$0.00 0	\$0.00 0	\$0.00 0	\$0.00 0	\$6,526.00 74	\$6,526.00 74
<input type="checkbox"/> Product Functionality	Sum of MRR Record Count	\$0.00 0	\$0.00 0	\$2,319.00 22	\$0.00 0	\$0.00 0	\$2,319.00 22
<input type="checkbox"/> New Ownership / Acquired	Sum of MRR Record Count	\$856.00 8	\$0.00 0	\$0.00 0	\$0.00 0	\$0.00 0	\$856.00 8
<input type="checkbox"/> Pricing / Finances	Sum of MRR Record Count	\$5,577.00 60	\$0.00 0	\$0.00 0	\$0.00 0	\$0.00 0	\$5,577.00 60
<input type="checkbox"/> Not a Good Fit	Sum of MRR Record Count	\$0.00 0	\$0.00 0	\$0.00 0	\$429.00 5	\$0.00 0	\$429.00 5
<input type="checkbox"/> No Longer Need	Sum of MRR Record Count	\$0.00 0	\$0.00 0	\$0.00 0	\$892.00 5	\$0.00 0	\$892.00 5
<input type="checkbox"/> Delinquent Payment	Sum of MRR Record Count	\$0.00 0	\$1,941.00 22	\$0.00 0	\$0.00 0	\$0.00 0	\$1,941.00 22
<input type="checkbox"/> Other	Sum of MRR Record Count	\$0.00 0	\$2,070.00 22	\$0.00 0	\$0.00 0	\$0.00 0	\$2,070.00 22
Total	Sum of MRR Record Count	\$14,401.00 172	\$4,011.00 44	\$2,319.00 22	\$1,321.00 10	\$6,526.00 74	\$28,578.00 322

For instance, churn due to Closed Business or New Ownership may be largely out of your control, whereas churn driven by product issues or pricing concerns may present opportunities for intervention. This insight is invaluable for refining your customer retention strategies and prioritizing areas for improvement.

This method allows you to answer key questions like:

- What are the most common reasons for churn?
- Which reasons for churn are preventable?
- How do different churn reasons correlate with specific customer segments?

[03] Associating churn to a market segment

Churn data becomes even more powerful when linked to specific market segments. Since all subscriptions are associated with a Global Parent account, it's possible to attribute churn to a market segment using a field that denotes the total number of units the parent account is believed to have.

FIGURE 6

Sample report associating MRR subscription churn to a market segment

Report: Accounts with Subscriptions		MRR Churn - CQ			
Total Records	Total MRR				
94	\$8,126.00				
Auto Segment	Service Type	Full Service	Limited Service	Other	Total
<input type="checkbox"/> 01 - Independent (2 units)	Sum of MRR Record Count	\$750.00 7	\$618.00 8	\$0.00 0	\$1,368.00 15
<input type="checkbox"/> 02 - Main (3-15 units)	Sum of MRR Record Count	\$1,486.00 18	\$2,193.00 29	\$0.00 0	\$3,679.00 47
<input type="checkbox"/> 03 - Strategic (16-80 units)	Sum of MRR Record Count	\$485.00 3	\$811.00 10	\$575.00 5	\$1,871.00 18
<input type="checkbox"/> 04 - Enterprise (81+ units)	Sum of MRR Record Count	\$0.00 0	\$1,208.00 14	\$0.00 0	\$1,208.00 14
Total	Sum of MRR Record Count	\$2,721.00 28	\$4,830.00 61	\$575.00 5	\$8,126.00 94

For example, you might segment your data by the size of the customer's business, the geographic region, or the style of service the restaurant operates. This allows you to see which market segments are more prone to churn and tailor your strategies accordingly.

This method allows you to answer key questions like:

- Which market segments have the highest churn rates?
- Are certain business sizes or types more susceptible to churn?
- How does churn behavior vary across different geographic regions?

Recommendation: At the Account level, particularly for records with the "Parent" record type, it's strongly recommended to create a "Size" or "Total Locations Overall" field that is mandatory when the record is in the restaurant industry. This will allow you to create a formula text field, named "Auto-segment," which can automatically segment opportunities or subscriptions related to the Account. This segmentation is crucial for targeted reporting and analysis.

Creating your first MRR churn dashboard

Once you've built your foundational reports, the next step is to create a dashboard that serves as a comprehensive rollup summary of all the underlying data components. This dashboard should be designed to provide a clear, at-a-glance view of your churn metrics, helping you quickly identify trends, monitor performance, and make informed decisions.

An effective MRR churn dashboard will cover multiple timeframes—such as Year-to-Date (YTD), Quarter-to-Date (QTD), Month-to-Date (MTD), and more—allowing you to track churn over different periods and compare current performance with historical data. The layout and visualization should be intuitive, making it easy to interpret and act on the data presented, ensuring that your team can swiftly respond to emerging patterns and potential issues.

The most successful dashboard format I've seen includes six columns representing:

1. YTD Churn
2. QTD Churn
3. MTD Churn
4. Last Month's Churn
5. This Week's Churn
6. Last Week's Churn

These columns provide a comprehensive, time-based view of churn. Within these columns, you can add rows to display widgets that group churn data by various factors:

1. Churned MRR total (Metric Chart)
2. Churned MRR by Churn Reason (Lightning Table)
3. Churned MRR by Market Segment (Lightning Table)

These 18 dashboard components offer insights into nearly every aspect of subscription-level churn, enabling you to answer critical questions such as:

- How much MRR did we churn last quarter due to business closures?
- Did we churn more MRR this month than we did last month?
- What are the top 3 reasons we've churned subscriptions so far this year?

Additionally, consider using the final two dashboard widgets (Salesforce limits dashboards to 20 total rollups) for comprehensive views, such as:

- All Churn with Full Churn Detail
- YTD MRR Churn Grouped by Competitor

FIGURE 7

Sample Salesforce MRR churn dashboard



Additional considerations for advanced churn tracking

Beyond the basics, measuring Net Revenue Retention (NRR) and Lifetime Value (LTV) in your CRM can provide strategic advantages for sales operations. These metrics offer deeper insights into customer behavior and the long-term impact of churn.

Assessing subscription LTV

Understanding the Lifetime Value (LTV) of your customers is crucial for assessing the long-term impact of churn and identifying which customers contribute the most to your revenue. In the context of subscription-based services, LTV represents the total revenue a customer is expected to generate over the duration of their relationship with your company.

To calculate LTV at the subscription level, you can use a straightforward approach leveraging the data already captured within your CRM, such as the subscription start date and term. A basic LTV formula might look something like this:

```
IF(
  ISPICKVAL(Status__c, 'Active'),
  Active_MRR__c * FLOOR((YEAR(TODAY()) - YEAR(Opportunity_Close_Date__c)) * 12
+ (MONTH(TODAY()) - MONTH(Opportunity_Close_Date__c))),
  Churn_MRR__c * -1 * FLOOR((YEAR(Churn_Date__c) -
YEAR(Opportunity_Close_Date__c)) * 12 + (MONTH(Churn_Date__c) -
MONTH(Opportunity_Close_Date__c)))
)
```

In simpler terms, this formula calculates the revenue generated during the active period of a subscription. For active subscriptions, it multiplies the MRR by the number of months the subscription has been active. For churned subscriptions, it calculates the revenue up until the churn date. This approach allows you to track the historical value of each subscription and gain insights into the overall LTV of your customer base.

By having a clear understanding of LTV, you can make more informed decisions about customer acquisition costs, marketing strategies, and retention efforts. It also helps in

identifying high-value customers who may warrant additional attention to prevent churn.

Assessing a customer's NRR

Net Revenue Retention is another critical metric that measures the percentage of recurring revenue retained from existing customers over a specific period. It accounts for upgrades, downgrades, churn, and any expansion revenue, providing a comprehensive view of how your customer base is growing or shrinking.

To effectively calculate NRR, your subscription-level details should include references to the Opportunity Type. Recommended values for Opportunity Type include New Business, Pilot, Rollout, Upsell, Cross-sell, and Organic Growth (NROs). This categorization allows you to differentiate between revenue generated from new customers and revenue generated from existing customers through expansion efforts.

A formula for calculating NRR at the parent account level might look like this:

```
IF(
  ISBLANK(Sum_Active_Subscription_MRR__c) || Sum_Active_Subscription_MRR__c =
  0,
  0,
  (
    (Sum_Active_Subscription_MRR__c + Sum_Active_Subscription_MRR_Expansion__c
    - Sum_Churned_Subscription_MRR__c)
    / Sum_Active_Subscription_MRR__c
  )
)
```

In essence, this formula calculates the NRR by comparing the sum of your active subscription MRR, expansion MRR, and churned MRR. This calculation helps you understand the effectiveness of your retention and expansion strategies. If your NRR is above 100%, it means you're not only retaining revenue but also growing it through upsells and cross-sells, despite any losses due to churn.

NRR provides a clear picture of the health of your recurring revenue streams and can guide your resource allocation, product development, and customer success strategies. By regularly monitoring NRR, you can proactively address issues that may

lead to churn and capitalize on opportunities for revenue growth within your existing customer base.

Conclusion

Building a robust reporting stack for churn tracking is a critical step in managing customer retention and driving business growth. By grouping churn data by date, reason, and market segment, and by creating comprehensive dashboards that visualize MRR churn, you can gain powerful insights into your business. As you advance, consider incorporating more sophisticated metrics like NRR and LTV to further enhance your strategic decision-making.

By continuously refining these reports and dashboards, and integrating advanced metrics, you ensure that your organization remains proactive in managing churn, ultimately leading to a more resilient and profitable business.

Part 4 - Turning churn insights into action

Accurate, readily-available churn data is a powerful tool for informing sales strategies and enabling data-driven revenue forecasting. With the right reports and dashboards in place, we can begin to draw actionable insights and make informed decisions that positively impact both customer retention and business growth. In this final part of the guide, we'll explore how to identify key churn drivers, focus on preventable churn, set SMART churn goals, and understand industry-specific churn standards to ensure your efforts are both effective and aligned with the realities of the market.

Identify key churn drivers

The first step in turning churn data into actionable insights is identifying the key drivers behind customer attrition. By analyzing the most common reasons for churn across different customer segments, you can pinpoint the factors that most frequently lead to lost business.

In the restaurant industry, churn is often driven by factors categorized under Market Dynamics. This includes churn reasons such as Closed Business, New Ownership (such as an acquisition), and Pricing / Finances—all of which are influenced directly or indirectly by market competitors. These external factors are difficult to control but crucial to understand, as they account for a significant portion of churn.

Additionally, usage-related churn is another frequent top category, as the adoption of software can be challenging in an environment where a manager's top priority is running their restaurant and building sales. Recognizing these key drivers allows you to tailor your retention strategies more effectively and focus your efforts where they can have the greatest impact.

Focus on churn you can influence

Not all churn can be avoided, but focusing on the churn that is preventable is essential for optimizing your retention strategies. This starts with understanding that certain

portions of churn, such as permanent business closures, are unavoidable. However, for the churn that is within your control, you can take actionable steps to mitigate it.

Turning churn data into insights means leveraging the information to guide product development, enhance customer support, and refine marketing strategies. For example, if churn data reveals that customers are leaving due to poor onboarding or lack of product adoption, these are areas where targeted interventions can make a significant difference. By focusing on preventable churn, you can reduce overall attrition and improve customer satisfaction.

Set SMART churn goals

To effectively reduce churn, it's crucial to establish SMART goals—Specific, Measurable, Achievable, Relevant, and Time-bound. The systems we've implemented make it relatively straightforward to set specific, measurable, and time-bound goals. For example, you might aim to reduce churn in a specific customer segment by a certain percentage within the next quarter. These clear objectives ensure that your team has a focused target to work towards, with a well-defined timeline for achieving it.

Leveraging churn data to build predictive models can further refine these goals. Predictive analytics allow you to forecast future churn rates with greater accuracy, helping you allocate resources more effectively and prioritize retention efforts where they will have the greatest impact. These models can reveal patterns that might not be immediately obvious, such as seasonal fluctuations or the impact of external factors like market dynamics. By incorporating these insights into your goal-setting process, you can set more realistic and data-driven objectives.

Setting churn goals in the restaurant tech B2B space, however, presents unique challenges, particularly when it comes to ensuring that your targets are both relevant and achievable. The restaurant industry is notoriously volatile, with external factors such as economic downturns, seasonality, and high business turnover rates often leading to higher-than-average churn. This variability can make it difficult to establish benchmarks that are realistic yet still ambitious enough to drive meaningful improvements.

When setting churn reduction targets, it's important to take these industry-specific challenges into account. For instance, while a standard SaaS company might aim for an annual churn rate of 3-5%, restaurant tech companies might need to adjust their expectations to account for the higher baseline churn rates inherent to the industry. Setting overly aggressive churn goals that don't reflect the realities of your market can lead to frustration and disengagement within your team. Instead, focus on setting targets that are challenging yet attainable, given the context in which your business operates.

Additionally, consider breaking down your overall churn goals into more manageable sub-goals, focusing on specific segments or types of churn. For example, you might set one goal for reducing churn due to product adoption issues and another for addressing churn caused by competitive pressures. By tackling each driver of churn separately, you can develop targeted strategies that are more likely to succeed.

In summary, setting SMART churn goals requires a careful balance of ambition and realism, particularly in the restaurant tech space. By leveraging data-driven insights, revisiting your strategies regularly, and tailoring your goals to the unique challenges of your industry, you can create a churn reduction plan that is both effective and sustainable.

Final thoughts

As you reach the end of this playbook, it's important to reflect on the journey you've taken to build a robust and effective churn management system. From aligning how your organization talks about churn to tailoring Salesforce for custom churn tracking, building insightful reports and dashboards, and finally turning those insights into actionable strategies, you now have the tools and frameworks necessary to tackle customer attrition head-on.

Churn is an inevitable part of any business, especially in the dynamic and often challenging restaurant tech industry. However, by understanding the key drivers behind churn, focusing on preventable losses, setting realistic and data-driven goals, and continuously refining your strategies, you can significantly reduce its impact on your business.

Remember, this playbook is not just a set of steps to follow but a living guide that should evolve as your business grows and as market conditions change. Regularly revisit these principles, update your processes, and ensure that your team remains aligned with the goals and strategies outlined here. With the right commitment, you can turn churn management into a strategic advantage, driving growth and fostering long-term customer loyalty.

Thank you for taking the time to engage with this playbook. Here's to your continued success in turning insights into action, and in building a stronger, more resilient business.

Appendix

Subscription (Custom Object)

Type	Field Label	Field Type	Values / Examples
Standard	Subscription Number	Auto Number	SUB-0000001
Custom	Status	Picklist	Implementation (Default), Active, On Hold, Churned, Replaced
Custom	Global Parent	Master-Detail (Account)	P. Terry's Burger Stand (Parent)
Custom	Location	Lookup (Account)	P. Terry's - North Lamar (#2)
Custom	Responsible Party	Lookup (Account)	P. Terry's Burger Stand (Parent)
Custom	Opportunity	Lookup (Opportunity)	P. Terry's New Business (33)
Custom	Product	Lookup (Product)	[Product Name]
Custom	MRR	Currency (16,2)	\$100.00
Custom	ARR	Formula (Currency)	\$1,200.00
Custom	Churn Date	Date	
Custom	Churn Reason	Picklist	
Custom	Churn Category	Formula (Text)	
Custom	Churn Reason - Detail	Text Area (255)	
Custom	Churn - Competitor	Lookup (Account)	
Custom	Notes	Text Area (255)	

Subscription Status: Definitions

Status	Definition	Recommendation
Implementation	The subscription is currently being set up and configured for the customer.	Default value for all new records.
Active	The subscription is fully operational, the customer is actively using the service, and payments are being made regularly.	Trigger: Flow automation alerting finance.
On hold	The subscription is temporarily paused, the customer is not currently using the service, and payments are suspended or at risk.	Trigger: Flow automation alerting finance.
Churned	The subscription has been terminated, the customer is no longer using the service, and payments have ceased.	Trigger: Flow automation sets Churn Date = TODAY() Field validation: A Churn Reason is <i>required</i> to save the record.
Replaced	The subscription has been replaced by a new subscription service, which may involve changes in the product or term, and the price may have increased or decreased accordingly. <i>Note: this status is intended to isolate Subscriptions that are no longer Active but should not be included in churn reporting.</i>	

Churn Reason: Category Mapping & Definitions

Churn Reason	Churn Category	Definition
Product Issue	Product	Problem(s) with core product functionality that hinder its effectiveness or reliability, such as: <ul style="list-style-type: none"> • frequent bugs or errors; • disruptions to user experience or productivity.
Feature / Functionality	Product	Missing or inadequate features, such as: <ul style="list-style-type: none"> • lack of integrations or gaps in functionality; • lack of customization options; or, • other specific tools needed to meet customer requirements.
Not a Good Fit	Relevance	Poor product fit and/or satisfaction typically due to targeting the wrong customers—possibly ones mismatched to ICP—often the result of deals inadequately vetted or poorly qualified. For clarity, churn in this category occurs when customers intend to use the product but cannot due to an incompatibility.
No Longer Need	Relevance	Customers who previously used the product but no longer require it due to fundamental changes in their business, strategy, or needs. Churn in this category is associated with customers who once found value in the product but have since transitioned away from needing its features or services.
Lack of Value	Value	Customers do not perceive enough value in the product relative to its cost or alternatives. The product does not deliver the results, ROI, or benefits that customers expected or needed.
Lack of Desired Outcome	Value	Customers are not achieving the specific goals or results they expected from the product, leading to dissatisfaction and eventual churn. This can occur due to: <ul style="list-style-type: none"> • misunderstanding or miscommunication of what the product can achieve; • the product not aligning with the customer's specific use case or needs; • failure to reach specific performance metrics, milestones, or operational improvements; or, • unmet expectations for solving critical problems or improving business outcomes.
Lack of Adoption	Usage	Customers are not effectively utilizing the product, often due to organizational or role-specific challenges, leading to churn. This can occur due to: <ul style="list-style-type: none"> • The purchaser not being the actual end-user, resulting in a disconnect between the decision-maker and those expected to use the product. • Inability of purchasers to enforce product usage among restaurant managers or staff.

Churn Reason	Churn Category	Definition
		<ul style="list-style-type: none"> Lack of buy-in from the staff who are supposed to use the product, leading to minimal or no adoption. Misalignment between the product's intended use and the actual needs or practices of the restaurant staff.
Lack of Engagement	Usage	<p>Customers have ceased interacting with the product and/or the company, leading to churn. This can occur due to:</p> <ul style="list-style-type: none"> customers not responding to communication attempts or support outreach; users disappearing after initial engagement without providing feedback or reasons; or, customers stopping usage without informing the company of specific issues or reasons.
Onboarding Issue	Services	Pre-launch churn associated with the unsuccessful implementation and/or onboarding of the customer, including ineffective processes that fail to adequately integrate and educate new users.
Support Issue	Services	Lacking or poor Customer Support experiences, including slow response times and/or unhelpful resolutions.
Success Issue	Services	Insufficient Customer Success efforts to ensure customers achieve their desired outcomes with the product, perhaps due to the lack of a designated person (or team) for managing and supporting the customer relationship. This can also include inadequate or poorly executed professional services intended to help customers effectively implement and utilize the product.
Closed Business	Market Dynamics	Location is closed for business, ceasing operations and permanently shutting down.
Pricing / Finances	Market Dynamics	Customer churn due to pricing issues or financial constraints, such as perceived high cost, budget cuts, or financial difficulties.
Competition	Market Dynamics	<p>Note: This Churn Reason is <u>not</u> recommended, and is only included here to explain our reasoning.</p> <p>Customers may switch to competitors offering better or more attractive solutions. Reps should investigate the underlying reasons for the migration and use the corresponding Churn Reason, such as:</p> <ul style="list-style-type: none"> better pricing; specific feature / functionality; additional support services; or any other relevant reason driving the change.

Churn Reason	Churn Category	Definition
		We recommend using a <u>separate</u> "Churn - Competitor" lookup field to capture competitive intelligence information and memorialize it accordingly.
New Ownership	Market Dynamics	Decisions made that deprioritize or replace the existing product, which may stem from: <ul style="list-style-type: none"> • new management being promoted or hired; • the lack, or loss, of an external executive sponsor; • purchase or acquisition.
Timing	Market Dynamics	Churn influenced by unfavorable timing, such as: <ul style="list-style-type: none"> • lack of dedicated resources on the customer side; • competitive priorities shifting focus away from adoption or continued use of the product; • seasonality of business.
External Forces	Market Dynamics	Events, often uncontrollable or unforeseeable, that cause temporary or permanent business disruptions leading to churn, such as: <ul style="list-style-type: none"> • pandemics; • economic downturns; or • major regulatory changes.
Cancellation via Partner	Operational	Deals sold, supported, or managed by third-party resellers or channel partners that are canceled. There are often limited details shared on the true reason behind the churn, making it challenging to identify specific issues or trends.
Non-payment	Operational	Issues with billing or payment processing leading to churn, be it involuntary by the non-paying customer or voluntary on behalf of the company. This includes customers with delinquent payments beyond a certain threshold.
Customer Dismissal	Operational	Instances where the company decides to terminate the subscription due to issues such as: <ul style="list-style-type: none"> • abusive behavior towards company or staff; • persistent issues or complaints; • repeat requests for excessive discounts; or • any other behavior deemed detrimental to the company's operations, staff, or public perception.
Other	Operational	"Other" should be used sparingly, and only when none of the predefined categories adequately capture the specific circumstances behind a subscription's termination. It's strongly recommended that you provide additional context or details in the "Churn Reason - Detail" field to ensure that the underlying cause is documented and can be reviewed for potential inclusion in future Churn Reason categories.

Automation Guide: Generate subscriptions from Closed Won Opportunities

Flow Name: Opportunity Product: Create Subscriptions on Closed Won

Flow Type: Record-triggered Flow

► Start (Trigger)

- **Object:** Opportunity
- **Trigger Flow When:** A record is created or updated
- **Set Entry Conditions:**
 - **Condition:** `StageName Equals Closed Won`
- **When to Run:** Only when a record is updated to meet the condition requirements
- **Optimize the Flow for:** Actions and Related Records
- **Include a Run Asynchronously Path:** No

📋 Variables Needed

API Name	Data Type	Object	Notes
selectedMRR0ppportunityLineItems	Record (allow multiple)	Opportunity Product	
quantityIndex	Number		0 decimal, default 0
singleSubscription	Record	Subscription	
subscriptionArray	Record (allow multiple)	Subscription	

1 Step 1 - Get Records

- **Label:** `getMRR0ppportunityLineItems`
- **Get Records of This Object:** Opportunity Product
- **Filter Conditions:**
 - `OpportunityId Equals $Record > Opportunity ID`
 - `Revenue_Type__c Equals Recurring`
- **How Many Records to Store:** All records
- **How to Store Record Data:** Choose fields and assign variables (advanced)
 - **Variable to Store Records:** `selectedMRR0ppportunityLineItems`
 - **Fields to Store:** `ID, Product2Id, Quantity, UnitPrice`

2 Step 2 - Loop

- **Label:** `loopSelectedMRRLineItems`
- **Select Collection Variable:** `selectedMRRopportunityLineItems`
- **Iteration Direction:** First item to last item

Inside Loop:

- **Step 1: Assignment**
 - **Label:** `setQuantityIndex`
 - **Set Variable Values:** `quantityIndex Equals Current Item from Loop > Quantity`
- **Step 2: Decision**
 - **Label:** `checkQuantityIndex`
 - **Condition:** `quantityIndex Greater Than 0`
 - **Outcome:** `quantityIndexGreaterThanZero` (if conditions are met)

Inside `quantityIndexGreaterThanZero` Outcome:

- **Step 3: Assignment**
 - **Label:** `assignOpportunityProductsToSingleSubscription`
 - **Set Variable Values:**
 - `singleSubscription > Product Equals Current Item from Loop > Product ID`
 - `singleSubscription > MRR Equals Current Item from Loop > Sales Price`
 - `singleSubscription > Opportunity Equals $Record > Opportunity ID`
 - `singleSubscription > Global Parent Equals $Record > Account ID`
 - `subscriptionArray Add singleSubscription`
- **Step 4: Assignment**
 - **Label:** `subtractFromQuantityIndex`
 - **Set Variable Values:** `quantityIndex Subtract 1`

End Loop

3 Step 3 - Create Records

- **Label:** `createSubscriptionsFromTable`
- **How Many Records to Create:** Multiple
- **Values to Create Multiple Records:** `subscriptionArray`

Additional resources

Ready for more? Restaurantology offers a variety of content to increase your knowledge of the industry:

- **KNOW THE MARKET:** A 5-step go-to-market guide for companies who sell to restaurants → watch on [Restaurantology's YouTube channel](#)
- **MarketMinds™ Blog:** [read here](#)
- **MarketMinds™ Podcast:** [listen here](#)

Acknowledgements

I would like to extend my deepest gratitude to two individuals whose expertise in customer experience (CX) greatly contributed to the development of this playbook. As a former sales leader, I recognize that my perspective alone would not have sufficed in creating a comprehensive guide. Their invaluable insights, drawn from their extensive experience in customer success, have enriched this work beyond measure. I am forever grateful for their contributions, and this playbook is as much a reflection of their wisdom as it is of my own efforts.

Note from the author

Thank you for taking the time to read Restaurantology's SaaS Churn Guide!

I hope you found the Sales Ops tactics and CRM recommendations valuable, and encourage you to share them—in part or in whole—with colleagues or peers who could benefit from this knowledge.

If you have any questions or feedback, I'd love to hear from you!

I'm passionate about discussing the restaurant industry, modern data acquisition through integrated market intelligence, data-driven GTM strategies, and everything in between. If you believe my experience, or Restaurantology's dataset, could give you a competitive edge in 2024, don't hesitate to reach out.

All the best,



Grant Gadoci

CEO @ Restaurantology | GTM, RevOps, and Revenue
R&D for B2B restaurant tech companies

[Email](#) | [LinkedIn](#) | [Schedule time to chat](#)