TOP 8 early churn signals and what to do when you spot them

8 **Support tickets spiking**
Escalate quickly, prevent repeat

5% increase in retention can boost profits by 25% to 95%.

How do I help them look good in the next 30–90 days?

7 **Change in primary stakeholder**
Engage early, add allies

6 **Payment delays and discount requests**
Check finances, reinforce ROI

5 **Declining order volume**
Validate trend, ask why

Focus not just on your top 10, but your 11–30 accounts.

4 **Budget-cut rumblings**
Reframe value, protect scope

3 **Downsizing the deal**
Understand cause, salvage core

What changed on their side last month that I might be missing?

2 **Delayed customer responses**
Push for call, reset tone

1 **Back in evaluation mode**
Highlight differentiators, re-sell

The THREE-step rep script

When a churn signal surfaces, reps need a safe way to raise it with customers:

1. **Clarify** – *“I noticed [specific change you observed].”*
   → Keep it neutral, factual, and non-confrontational.

2. **Confirm** – *“Has something changed on your side?”*
   → Use open questions to show curiosity, not blame.

3. **Commit** – *“Let’s set a quick check-in to make sure we stay aligned.”*
   → End with a clear next step to stay engaged.

8 Support tickets spiking

Jordan's customer, a plastics manufacturer, filed nine support tickets in 48 hours about a recurring sensor glitch – triple their norm. Frustrated by delays and repeat explanations, the plant manager lined up demos with a competitor. By the next quarter, the largest production line had shifted to the new supplier.

WHAT TO WATCH FOR:

- Several tickets in a short window on the same issue.
- Subject lines with "urgent," "again," or escalations.
- New voices jumping in (plant lead, ops boss) sounding frustrated.

HOW TO GET BACK ON TRACK:

Own the problem and set a simple daily rhythm until it's fixed. After resolution, ask, "What would have made this painless?" and write that into your prevention plan.

7 Change in primary stakeholder

Maya's main contact, the VP of operations at an auto-parts supplier, retired after 12 years. Within weeks, his replacement announced a "reset of supplier contracts." With her champion gone, Maya's packaging deal was pushed back out to bid – and a rival walked away with the larger share.

WHAT TO WATCH FOR:

- Projects or decisions suddenly stall after your champion leaves.
- "I'm taking over this category" intros from a new manager.
- Early questions about contracts, pricing, or "current supplier list."

HOW TO GET BACK ON TRACK:

Make the newcomer the hero. Ask how they'll be measured in 90 days, propose two fast wins that map to those metrics, and get two introductions to widen your ties.

QUICK CHECKLIST

Confirm the change

- Check LinkedIn, press releases, or the customer's email signatures.
- Validate internally: has anyone else heard about this leadership shift?

Assess the impact

- Was this person your champion, budget holder, or blocker?
- How central were they to decision-making in the last deal cycle?

Identify existing allies

- Note other contacts who already support your solution (ops, planners, QA, etc.).
- Reach out quietly to confirm how the new stakeholder fits into the org chart.

Decide if outreach is needed now

- If the new stakeholder has already surfaced with questions or contract reviews, act quickly.
- If not, set a reminder to make an introduction before the first renewal or order cycle.

Prepare for the first call

- Aim to understand, not pitch. Ask: "What are your priorities in the first 90 days?"
- Have 1–2 ideas ready for small, fast wins that align with those priorities (but don't lead with them).

Secure a meeting

- Offer two short, specific time slots this week to introduce yourself and listen.

Widen the net

- Ask for introductions to 1–2 other team members connected to the new leader's goals.
- Build a wider circle of contacts so you have multiple perspectives and advocates.

Email template to customer

SUBJECT LINE OPTIONS:

Welcome and quick intro

Congratulations on your new role

Looking forward to working together

BODY:

Hi [First name],

Congratulations on stepping into your new role as [title]. I work with your team on [specific product/service] and wanted to quickly introduce myself.

As you get up to speed, I'd like to hear what your top priorities are over the next few months and how we can best support them. I can also share a quick snapshot of what's been working well in our partnership so far.

Would you have time for a short call [Option 1] or [Option 2]? If another time works better, I'll adjust.

Looking forward to connecting,

[Your name]

COMMON PITFALLS (AVOID THESE)

- **Talking to the past.** Don't sell the old plan – ask for their plan.
- **Info dumping.** One page beats a 20-slide deck.
- **Leading with discount.** Win with value and quick improvements first.
- **Relying on one contact.** Get at least two more relationships in place.
- **Waiting.** Welcome them within **48 hours** while the slate is still fresh.

6 Payment delays and discount requests

Mark's HVAC wholesale customer had always paid their invoices on time. Then payments started landing a couple of weeks late, and the buyer asked for a small discount "to help with cash flow." By renewal, the account was already testing a cheaper competitor.

WHAT TO WATCH FOR:

- Payments arriving later than usual.
- Requests to stretch payment terms.
- Small discounts tied to cash flow or early pay.
- Mentions of cost-cut programs or "supplier reviews."

HOW TO GET BACK ON TRACK:

Lead with curiosity, not penalties. Ask what's behind the shift – cash flow, procurement targets, or cost pressures – and listen closely. Explore limited, time-bound options (adjusted schedules, early-pay discounts, volume tiers), but always tie the conversation back to ROI and total cost so they remember why keeping you matters.

5 Declining Order Volume

David noticed his corrugated box customer, a regional manufacturer shipping heavy equipment parts, had weekly pallet orders slip from 50 to 35. He brushed it off as a "seasonal lull." By the next month, the customer had shifted those shipments to a lower-cost competitor.

WHAT TO WATCH FOR:

- Smaller or less frequent orders than this time last month/quarter.
- Whole SKUs quietly disappearing from the PO.
- "Seasonal lull" or "inventory tidy-up" explanations that don't match history.

HOW TO GET BACK ON TRACK:

Lead with curiosity, not blame: bring one small, concrete fix and two time options. Set a shared target for the next order cycle and a date to review it.

QUICK CHECKLIST

Spot the change

- Open your order history for the last 2–3 months.
- Has order size or frequency dipped compared to the same period last year or the last quarter? Flag it.

Check the context

- Ask: could this be normal?
- Look for seasonality, holidays, promotions ending, or planned shutdowns.
- If there's no obvious pattern, keep the flag.

Validate quietly

- Confirm with your own ops or finance team: do they see the same dip?
- Check if there are any known supply or logistics issues on your side.
- Rule out "our fault first."

Decide if it's worth a call

- If the drop is consistent and unexplained, that's your trigger.
- Don't wait for it to "fix itself."

Prepare for the conversation

- Go in with curiosity, not assumptions.
- Note 2–3 specific changes you've seen (e.g., "this SKU missing," "orders down 25%").
- Be ready to ask open questions like: "What's behind the change?"

Secure a time

- Offer two short, specific time slots this week to connect.
- Frame it as "wanting to understand," not "selling more."

Loop in the right people (later if needed)

- If the customer confirms a real shift, then bring in ops, buyer, or product to explore fixes.
- Don't pre-offer solutions until you know the reason.

Email template to customer

SUBJECT LINE OPTIONS:

Quick check-in on recent orders

Can we connect this week?

Wanted to understand your recent order pattern

BODY:

Hi [First name],

I was reviewing your recent orders and noticed a dip compared to the past few months. Sometimes that's just a normal cycle, but I wanted to check directly with you to understand if anything has changed on your end.

Would you have time for a short call to walk through it? I'm free [Option 1: Day, time] or [Option 2: Day, time]. If another time works better, just let me know.

No agenda other than making sure we're aligned and that the supply is matching what you need.

Best,

[Your name]

COMMON PITFALLS (AVOID THESE)

- **Explaining the dip to the customer.** Ask first – they'll tell you.
- **Leading with discount.** Fix flow and fit before price.
- **Skipping the follow-up.** If you test a new arrangement, book a review date

4 Budget-cut rumblings

Sophie's customer, a building materials distributor, started hinting at "tightening belts" during a quarterly review. Soon after, her contact mentioned an internal cost-savings initiative and asked for a list of "essential vs. optional" services. Within two months, they had stripped non-core items from the contract and opened bids on the rest.

WHAT TO WATCH FOR:

- Phrases like "belt tightening" or "cost control."
- Procurement cost-cut program announced.
- Requests to categorize services as "essential" vs. "optional."
- Pushback on renewals, upgrades, or add-ons.

HOW TO GET BACK ON TRACK:

Reframe value around business-critical outcomes, not extras. Anchor conversations on ROI, productivity, or cost avoidance – and position yourself as helping them hit savings goals without losing what matters most.

3 Downsizing the deal

Anthony's customer, a regional food producer, renewed but cut their packaging contract from 100 pallets a week to 60. He only learned later that procurement had been instructed to cut back supplier commitments. By the time Anthony responded, the customer had already split the remaining volume between two vendors.

WHAT TO WATCH FOR:

- Renewal discussions focused on "reducing scope" or "paring back."
- Asking to reduce volumes or delivery frequency.
- Customers framing reductions as "temporary" without a set return plan.

HOW TO GET BACK ON TRACK:

Don't just accept the cut – probe for why it's happening. Once you understand the driver (budget pressure, slower product movement, or competitive pricing), protect the core of the deal and map a clear path for growing back later.

QUICK CHECKLIST

Spot early signs
Watch for reduced renewal term lengths or pilot-only conversations.

Check usage/adoption
Are all SKUs, licenses, or pallets being fully used?

Validate with allies
Confirm if procurement or finance has pushed a downsizing directive.

Probe reasons directly
Ask: "What's driving the shift?" Budget, performance, or competitor?

Secure the core
Define what's mission-critical for the account and lock it in.

Offer a roadmap back
Set clear steps for restoring full scope when conditions improve.

Email template to customer

SUBJECT LINE OPTIONS:

Checking in on renewal scope

Planning for the right fit

Aligning on contract size

BODY:

Hi [First name],

I noticed the upcoming contract talks are focused on cutting back volume. I'd like to understand what's driving that so we can make sure the agreement still covers what your team needs.

Can we connect briefly this week? I'm available [Option 1] or [Option 2]. My goal is to protect what matters most for your operation and set a path to add volume back when the timing is right.

Best,

[Your name]

COMMON PITFALLS (AVOID THESE)

- Accepting cuts without probing why.
- Offering blanket discounts instead of targeted options.
- Missing signs of under-used products or slower-moving orders.
- Leaving no plan for expansion later.

2 Delayed customer responses

Nina's client, a metals distributor, used to reply within a day on quotes and delivery schedules. Lately, emails went unanswered for a week, and calls kept getting pushed off. By the time Nina reconnected, the customer had already placed trial orders with a competitor.

WHAT TO WATCH FOR:

- Longer gaps in email or call replies.
- Meetings postponed or cancelled more than once.
- Decisions dragging with no clear reason.
- Excuses like "busy" or "waiting on leadership" becoming routine.

HOW TO GET BACK ON TRACK:

Don't chase with more emails – reset the relationship. Offer two short call slots, frame it as checking alignment, and surface whether priorities or suppliers have shifted.

1 Back in evaluation mode

Carlos learned his industrial fasteners customer had quietly invited three vendors to submit quotes – even though his company was the incumbent. During calls, the new procurement lead pressed him for "apples-to-apples" comparisons and extra references. Within the quarter, half the business shifted to a lower-bid competitor.

WHAT TO WATCH FOR:

- Customer tells you they're getting additional quotes or "reviewing suppliers."
- Procurement asks you to re-confirm pricing or provide a formal proposal.
- A contact mentions competitor products, features, or deliveries during calls.

HOW TO GET BACK ON TRACK:

Acknowledge the evaluation and re-sell your differentiators. Emphasize ROI, reliability, and total cost of ownership – not just unit price. Bring fresh proof points and references to strengthen your position.

QUICK CHECKLIST

Notice the shift
Customer mentions getting other quotes or opening things up to bid.

Check with your contact
Ask your main ally if new suppliers are being considered.

List your strengths
Write down the 2–3 most important ways you deliver more value than others.

Pull proof that matters
Bring examples, results, or customer stories that fit this account's priorities.

Frame the conversation
Ask directly: "What are the top things you're comparing as you review options?"

Back it up
Share a reference customer who faced a similar choice and stayed with you.

Email template to customer

SUBJECT LINE OPTIONS:

Checking in on supplier review

Making sure we're aligned

Here to support your review

BODY:

Hi [First name],

I understand you're reviewing options for [product/service]. I'd like to make sure we're clear on what you're comparing and how we can best support your operation.

Would you have time for a short call [Option 1] or [Option 2]? I can also connect you with other customers in your industry who've seen strong results working with us.

Looking forward to the conversation,

[Your name]

COMMON PITFALLS (AVOID THESE)

- Ignoring signs of competitor involvement.
- Talking only about features instead of business outcomes.
- Competing purely on price without highlighting total value.
- Waiting until the renewal date to respond.

About SugarCRM

SugarCRM helps sales teams reach their highest potential. Companies choose SugarCRM to cut through complexity, prioritize opportunities, and increase upsell using the resources they already have. SugarCRM is ideal for complex, relationship-driven industries - such as manufacturing, wholesale and distribution - looking to accelerate growth and drive smarter decision-making.

Learn more at www.sugarcrm.com.

sugarcrm | Unlock sales potential

NORTH AMERICA | LATIN AMERICA | EUROPE | ASIA-PACIFIC