

How to Calculate Churn (CSM team)

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What does churn mean for Bold Group?

In SaaS, churn *represents the loss of customers or revenue within a given time period*. For Bold Group, this needs careful definition because many customers use multiple products (e.g., AlarmBiller → SedonaOffice, SedonaOffice + Manitou).

To avoid overstating churn:

- Logo Churn = when a customer completely exits Bold (all subscriptions cancelled).
- Product Churn = when a specific Bold product is cancelled but the customer remains (e.g., migration from AlarmBiller to SedonaOffice). This should be tracked for product strategy but not counted as logo churn.
- Revenue Churn = recurring revenue lost from cancellations or downgrades, net of expansions.

When do we calculate churn?

- Monthly (operational)
 - CSMs track churn in near-real time for early warning.
 - This guides CSM programming, quarterly OKRs, customer meetings
- Quarterly (executive)
 - Roll up results for Josh/Jenn/leadership to smooth anomalies and align to financial reporting cycles.

Metrics to report:

- Logo Churn %

- Gross Revenue Churn %

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- Net Revenue Retention (NRR) %

What fields do we need to standardize in Salesforce?

Account-Level Fields (for Logo Churn & Revenue Rollup)

- Account ID / Account Name (unique identifier) (#1)
- Account Status (Active, Onboarding, Cancelled) (#2)

- Total MRR/ARR (sum of all active subscriptions) (#3)

- Go-Live Date (to exclude pre-live cancellations)
 - I don't think we have this metric currently?

Product/Subscription-Level Fields (for Product Churn & Revenue Movement)

- Product Name (SedonaOffice, Managely, Manitou, AlarmBiller, etc.)

- Subscription Start Date / End Date
- Subscription Status (Active, Cancelled, Migrated)
- MRR / ARR Value
- Cancellation Effective Date
- Cancellation Reason (Migration to Bold product, Competitor, Business Closure, Other)

Case Object (since cancellations are logged as Cases today)

- Link each cancellation Case to the relevant Subscription and Account
 - Capture ARR/MRR Lost in the Case record
 - Ensure Cancellation Reason is required
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