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Commercial Excellence

Health Score Design & Lifecycle Interventions Playbook

Designing health scores that trigger the right intervention at the right lifecycle stage, not a single blanket response

- Practitioner
- Intermediate
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- Administrator
- 14 November 2023
- 3 minute(s)

Overview

A framework for health score design and lifecycle interventions — building health scores that account for different customer lifecycle stages and trigger stage-appropriate interventions, avoiding a one-size-fits-all health scoring approach that treats a new customer's risk signals the same as an established customer's.

Why would a customer's health score need to account for their

specific lifecycle stage, rather than using consistent scoring criteria throughout the relationship? A new customer's low engagement might indicate normal onboarding ramp-up, while the same low engagement in an established customer might indicate genuine risk — treating these identically with the same scoring criteria and intervention misses this important lifecycle context.

What's the most common health score design mistake?

Using uniform scoring criteria and intervention triggers regardless of customer lifecycle stage, producing false-positive risk flags for customers still in normal ramp-up phases or missing genuine risk in established customers whose baseline behavior differs from newer ones.

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