

CSM Dashboard Review Report Template

This template helps Customer Success Managers (CSMs) document key insights from dashboard reviews, track customer health trends, and define action items for proactive engagement.

Customer Overview

- Customer Name: _____
- Account Manager: _____
- Industry: _____
- Subscription Tier: _____
- Renewal Date: _____
- Last Engagement Date: _____

Key Health Metrics

- Login Frequency (Last 30 Days): _____
- Feature Adoption Rate (%): _____
- Support Tickets (Open): _____
- NPS Score: _____
- Health Score: _____

Risk Indicators & Concerns

- ☒ Low Product Engagement
- ☒ High Support Ticket Volume
- ☒ Negative Customer Sentiment (NPS Detractor)
- ☒ Upcoming Renewal with Low Usage
- ☒ Other: _____

Growth & Expansion Opportunities

- ☒ High Feature Adoption
- ☒ Increasing User Engagement
- ☒ Positive NPS Score (Promoter)
- ☒ Potential Upsell or Cross-Sell
- ☒ Other: _____

Recommended Action Plan

- Schedule a Check-In Call: _____
- Address Support Escalations: _____
- Provide Training/Webinar on Feature: _____
- Discuss Renewal Readiness: _____
- Explore Upsell/Expansion: _____
- Other: _____

Next Steps & Follow-Ups

- Next Scheduled Meeting: _____
- Follow-Up Email Sent on: _____
- Internal Teams Notified (Support/Product/Sales): _____
- Next Dashboard Review Date: _____