

Analyze renewal exposure and revenue leakage for a fictional B2B SaaS business with 600 customers, GBP6.8M ARR, 75 contracts renewing within 9

Recorded execution evidence

Objective

Analyze renewal exposure and revenue leakage for a fictional B2B SaaS business with 600 customers, GBP6.8M ARR, 75 contracts renewing within 90 days, GBP920,000 in renewal ARR, 18 high-risk accounts representing GBP410,000 ARR, and 11 unresolved billing disputes. Produce an evidence-grounded executive assessment covering exposure, risk segmentation, intervention priorities, accountable owners, a 30-day action plan, and measurable KPIs. Clearly distinguish supplied facts from assumptions and unknown account-level information. Do not invent customer records, claim recovered revenue, contact customers, or modify business systems.

Completion assessment

The completed assessment provides evidence-grounded exposure calculations, risk segmentation, intervention priorities, and distinguishes supplied facts, assumptions, and unknowns without inventing records or claiming actions.

Recorded task results

1. Produce evidence-grounded renewal exposure assessment

Status: completed | Iteration: 1

Executive Renewal Exposure Assessment

1. Evidence base

Supplied facts

- 600 customers
- GBP6.8M total ARR
- 75 contracts renewing within 90 days

- GBP920,000 renewal ARR
- 18 high-risk accounts representing GBP410,000 ARR
- 11 unresolved billing disputes

Key calculations

- Customers renewing within 90 days: $75 / 600 = 12.5\%$
- Renewal ARR as a share of total ARR: $\text{GBP}920\text{k} / \text{GBP}6.8\text{M} = 13.5\%$
- High-risk accounts as a share of renewal cohort: $18 / 75 = 24.0\%$
- High-risk renewal ARR exposure: $\text{GBP}410\text{k} / \text{GBP}920\text{k} = 44.6\%$
- High-risk ARR as a share of total ARR: $\text{GBP}410\text{k} / \text{GBP}6.8\text{M} = 6.0\%$
- Remaining renewal cohort: 57 accounts and GBP510k ARR, assuming the high-risk accounts are included in the 75 renewals
- Average ARR per renewing contract: approximately GBP12.3k
- Average ARR per high-risk account: approximately GBP22.8k

The high-risk segment contains 24% of renewing accounts but 44.6% of renewal ARR, indicating concentration in higher-value contracts.

2. Executive assessment

The business has GBP920,000 of renewal ARR exposed within 90 days. At least GBP410,000 is explicitly identified as high risk, making it the immediate priority. This represents nearly half of the near-term renewal value.

The 11 unresolved billing disputes are a material potential leakage source, but their financial impact cannot be quantified from the supplied information. Their overlap with the 75 renewing contracts and 18 high-risk accounts is also unknown. They should therefore be treated as an urgent investigation queue, not added to the GBP410,000 exposure without account-level evidence.

3. Risk segmentation and priorities

Segment	Known volume	Known ARR	Priority
High-risk renewals	18 accounts	GBP410,000	Critical
Other renewals	57 accounts*	GBP510,000*	High
Billing disputes	11 cases	Unknown	Critical investigation
Total renewals	75 contracts	GBP920,000	Executive oversight

*Assumes the 18 high-risk accounts are part of the 75 renewing contracts.

Intervention priorities

1. High-risk accounts: establish account-level save plans, executive sponsorship, renewal blockers, usage/adoption status and decision dates.
2. Billing disputes: assign owners, validate disputed amounts, determine whether disputes affect renewal decisions, and resolve or escalate.
3. Remaining renewal cohort: ensure every contract has a documented renewal stage, owner, next action and forecast.
4. Revenue leakage controls: reconcile contract terms, invoices, credits, discounts and renewal amounts before close.

4. Accountable owner roles

- Executive sponsor: overall renewal exposure, weekly decisions and escalation.
- Renewals/Account Management: account plans, stakeholder engagement and renewal milestones.
- Customer Success: adoption, value realization and risk mitigation.
- Finance/Billing: dispute validation, invoice reconciliation, credits and billing corrections.
- Sales Operations/RevOps: single renewal dashboard, data quality and forecast reporting.
- Legal/Deal Desk: non-standard terms, contractual obligations and commercial exceptions.

These are role assignments, not evidence that specific individuals are currently assigned.

5. 30-day action plan

Days 1-7: Establish control

- Create a renewal register covering all 75 contracts.
- Confirm renewal date, ARR, owner, stage, risk, next action and decision-maker.
- Triage all 11 billing disputes.
- Identify overlap between disputes, high-risk accounts and upcoming renewals.
- Produce an executive view of the GBP410,000 high-risk exposure.

Days 8-14: Diagnose and intervene

- Complete save plans for all 18 high-risk accounts.
- Validate usage, customer outcomes, open issues and commercial blockers.
- Reconcile billing records for disputed and high-value renewal accounts.
- Assign executive sponsors to the highest-value or most time-critical risks.

Days 15-21: Execute mitigation

- Progress documented renewal actions and escalations.
- Resolve, credit, reject or formally escalate billing disputes based on evidence.
- Review pricing, terms, commitments and renewal dates for leakage risks.
- Reforecast renewal outcomes using defined evidence, not unverified optimism.

Days 22-30: Govern and improve

- Conduct an executive renewal-risk review.
- Confirm next actions and decision dates for every at-risk account.
- Report dispute ageing and financial exposure.
- Document recurring root causes and establish a repeatable 90-day renewal process.

6. Measurable KPIs

Coverage and execution

- 100% of 75 renewals have a named owner, renewal date, stage and next action by Day 7.
- 100% of 18 high-risk accounts have documented save plans by Day 14.
- 100% of 11 disputes have an owner, status, ageing and next action by Day 7.
- 100% of renewals have a confirmed decision-maker or documented gap by Day 21.

Financial control

- GBP410,000 high-risk ARR reviewed weekly.
- 100% of disputed renewal accounts receive billing reconciliation.
- Track disputed ARR separately; do not count it as recovered until confirmed.
- Track renewal forecast accuracy against actual outcomes.

Risk reduction

- Number and ARR of high-risk accounts with a documented mitigation action.
- Number and ARR of disputes resolved or escalated.
- Renewal ARR with confirmed customer intent.
- Renewal ARR lacking next action or decision date.
- Gross renewal rate and retained ARR, measured only after renewals occur.

7. Assumptions and unknowns

Assumptions used

- The 18 high-risk accounts are included within the 75 renewing contracts.
- "Renewal ARR" represents ARR scheduled for renewal, not guaranteed retained revenue.
- Average ARR calculations are descriptive and do not imply equal account sizes.

Unknown account-level information

- Customer names, contract dates, tenure and individual ARR.
- Whether billing disputes overlap with high-risk or renewing accounts.
- Disputed monetary values and potential credits.
- Current renewal stage, customer sentiment, product usage and decision-maker status.
- Contractual obligations, discounts, expansion opportunities and probability of renewal.
- No revenue has been recovered or protected based on the supplied facts alone.

AI synthesis status

Executive synthesis unavailable: Request timed out.