

## From Red to Green: Telling the Turnaround Story

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### Episode 10 Companion Download

Use this framework to document and communicate account turnarounds effectively to both internal stakeholders and customers.

### When to Tell the Turnaround Story

Audience	Milestone Trigger
Internal Team	60 days minimum of sustained improvement (two billing cycles, two months of usage data)
Customer (EBR)	Three consecutive touchpoints showing sustained improvement (QBRs, monthly check-ins, or executive syncs)
Public/Case Study	After renewal or expansion milestone (early renewal, additional licenses, departmental expansion)

*Decision Rule: If you're not sure whether you've hit the milestone, you haven't. Wait an extra month rather than risk walking it back.*

### Internal Storytelling Framework

#### *The Three-Part Structure*

- **The Problem (Specific):** Don't say 'customer was unhappy.' Say 'VP champion left, no executive visibility for 6 months, adoption at 22%, evaluating competitors.'
- **Your Approach (Strategy):** Not every detail—just the plan. '60-day get-well plan with three focus areas: executive alignment, usage recovery, quarterly business review cadence.'
- **The Outcome (Business Impact):** 'Within 60 days: new executive champion, adoption climbed to 68%, renewed early at 110% of original contract value.'

*Document it: Put this in your CRM, internal wiki, or shared folder so other CSMs can reference your methodology.*

## Customer-Facing EBR Structure

*Slide Title: 'Our Journey: From Challenge to Momentum'*

Section	What to Say
Where We Started	Simple, factual language. No drama. No blame. 'Six months ago, we faced three challenges: executive turnover, low adoption (22%), limited ROI visibility at leadership level.'
What We Did Together	Emphasize partnership. 'We worked together to build a plan. You connected us with your new CISO. Your team committed to weekly check-ins. We restructured quarterly reviews.'
Where We Are Today	Show results with numbers. 'Today: adoption at 68% (up from 22%), SOC team using platform for 90% of investigations, estimated \$340K annual savings in incident response time.'
Looking Forward	Position as foundation, not finish line. 'We're proud of the progress and committed to building momentum. Next quarter: expanding to compliance team, supporting your upcoming audit cycle.'

### Common Mistakes to Avoid

- **Waiting too long or telling it too early:** Use the milestone triggers above—don't guess.
- **Making it about you:** For customers, it's about them and their results. Save 'what I did' for internal teams.
- **Ignoring contributors:** Credit your AE, Support, Product, Engineering. Sharing the spotlight builds credibility.

### Turnaround Documentation Checklist

- Problem statement documented (specific, measurable)
- Strategic approach outlined (not every detail, just the plan)
- Outcome documented with business metrics
- Internal story captured in CRM/wiki/shared folder
- Customer-facing version prepared for EBR
- Key contributors acknowledged
- Timeline milestones tracked (when red status started, when improvement began, when green achieved)
- Next steps/forward momentum clearly defined

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