

Your First Portfolio: How to Prioritize Accounts

Episode 4 Companion Download

This companion download includes three essential templates to help you prioritize and manage your customer success portfolio effectively. Use these tools to bring structure to your accounts, build your plan, and communicate your priorities internally.

Template 1: Portfolio Prioritization Worksheet

Use this worksheet to segment your accounts into tiers based on ARR, strategic value, and risk level. This is your foundation for knowing where to focus your time and energy.

Instructions

- Fill in account details for each customer in your portfolio
- Assign a tier (T1, T2, or T3) based on ARR, strategic importance, and risk
- Note the last contact date and any immediate red flags
- Use this as your master reference for portfolio management

Account Name	ARR	Tier	Status	Last Contact	Red Flags
Acme Corp	\$250K	T1	Yellow	2 weeks ago	Low usage

Tier Definitions

Tier 1 (Strategic / High-Touch): Highest ARR, strategic logos, or high-risk accounts. Monthly or bi-weekly engagement. Formal EBRs. These accounts require proactive management.

Tier 2 (Standard / Medium-Touch): Solid ARR, healthy usage. Quarterly or monthly check-ins. Responsive when they reach out. Monitor for changes.

Tier 3 (Transactional / Low-Touch): Lower ARR, self-sufficient customers. Quarterly check-ins or as-needed. Available but not proactive.

Template 2: 30-60-90 Day Planning Template

Use this template to create a structured action plan for your first three months with a new portfolio. This ensures you're making progress strategically rather than just reacting to what's urgent.

First 30 Days: Foundation

Key Objectives

- Reach out to every Tier 1 account to introduce yourself
- Identify and document your top 3-5 at-risk accounts
- Review and update health scores based on initial findings
- Schedule internal syncs with Sales, Support, and Product for context

Action Items

Account/Task	Action	Deadline

60 Days: Momentum

Key Objectives

- Have meaningful conversations with all Tier 1 and most Tier 2 accounts
- At-risk accounts should have active mitigation plans in place
- Begin planning EBRs for top accounts
- Start tracking expansion signals and growth opportunities

Action Items

Account/Task	Action	Deadline

90 Days: Confidence

Key Objectives

- Feel confident in your portfolio - know who's stable, who's at risk, and who's a growth opportunity
- Your tiering should be locked in (though it can always adjust)
- Have at least one success story to tell internally
- Document process gaps and advocate for needed changes

Action Items

Account/Task	Action	Deadline

Template 3: Manager Update Email

Use this template to communicate your portfolio status to your manager. This creates visibility, documents your work, and shows you're thinking strategically.

Subject Line:

Portfolio Overview - [Your Name] - [Date]

Email Body:

Hi [Manager Name],

Quick update on my portfolio as I wrap up my first [30/60/90] days:

Tier 1 Accounts (High-Touch):

- [Account Name] - ARR: \$XXX - Status: Green - Next EBR: [Date]
- [Account Name] - ARR: \$XXX - Status: Red - Mitigation plan in progress
- [Account Name] - ARR: \$XXX - Status: Yellow - Monitoring usage trends

At-Risk Accounts:

- [Account] - Low usage, exec turnover - Meeting scheduled for [Date]
- [Account] - Support escalation unresolved - Looping in Product

Expansion Opportunities:

- [Account] - Expressed interest in [Feature/Product] - Flagging for Sales

Blockers:

- Need access to usage dashboard for 3 accounts
- Waiting on Sales handoff notes for 2 new accounts

Let me know if you want to sync on any of these.

Thanks,

[Your Name]

How to Use These Templates

- Start with the Portfolio Prioritization Worksheet to get visibility on your entire book
- Use the 30-60-90 Day Planning Template to create structure around your first three months
- Send the Manager Update Email weekly or bi-weekly to create visibility and document your progress
- Revisit and update these templates regularly as your portfolio evolves

These templates are designed to give you structure when everything feels chaotic. They're not perfect - but they're a starting point. Adapt them to fit your company's processes and your personal style.

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