Implementing a Code Red Process

Some Gainsight customers use a variation of the risk management framework for identifying and monitoring "code red" customers, or those at risk of churning. This process was developed to create visibility for escalated accounts, assign clear next steps and owners, enable collaboration on escalated accounts, engage executives, and measure progress. This article explains how to configure CTA priorities, reasons, and rules to implement a code red process in your organization.

Identifying Code Red Accounts

In order to identify an account as Code Red, we create a Call to Action with Priority = Code Red. We use CTAs so we can define clear game plans and track progress. Before we develop the CTA, we'll first cover a few configuration components.

Step 1: Create a Code Red Priority Code

1. In Administration > Cockpit Configuration > scroll down to Call to action priority.
2. Click + Add Priority.
3. The first letter of your Priority name will display as the icon in Cockpit, so we use “R Code Red,” so the icon says “R.”

Step 2: Adjust Your CTA Reason to Reflect Common Code Red Causes

For each Code Red CTA, users will select a Reason that captures the essence of the Code Red. By identifying a finite list of possible Code Red reasons, you can report on whether the company is making progress on minimizing these over time.

https://support.gainsight.com/Cockpit_and_Playbooks/Examples_and_Tutorials/Implementing_a_Code_Red_Process

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Scroll down to Call to action reason and click + Add reason. Example list of Code Red reasons:

- Low adoption
- Implementation challenges
- Product gap
- Customer data challenge
- Exec Sponsor left
- Power user left

**Step 3: Add a Status with Category = Closed Lost**

![New Status Dialog](https://support.gainsight.com/Cockpit_and_Playbooks/Examples_and_Tutorials/Implementing_a_Code_Red_Process)

**Tracking Solved or Lost Code Reds** In order to distinguish between solved Code Reds and lost Code Reds, make sure your CTA Status options include both a value with category “Closed Won” and value for “Closed Lost”. This will enable reporting on, for example, “Successfully Solved Code Reds By Reason” or “Lost Code Reds By CSM”.

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Step 4: Add playbook for your team to take action

Step 5: Create a Rule to Trigger a Weekly CTA for Exec Sponsors

As part of Gainsight’s Executive Sponsorship Program, Execs assigned to Code Red accounts get a weekly CTA to reach out to the customer. For more on Gainsight’s Executive Sponsorship Program, see our webinar. The following rule assumes that you have identified the exec sponsor for each customer on the Account.

1. Navigate to Administration > Rules Engine and click + Add Rule.

2. Select Custom rule and enter a name. (Ex: GS Exec - Code Red Weekly Checkin + Notes)

3. Select the Call to Action object, since the code red priority is stored in the CTA.

4. Add the following fields to the Show section:
   - Call To Action: Account
   - Call To Action: Account Name
Call To Action: Assignee Name
Call To Action: Created Date
Call To Action: Reason Name
Call To Action: Status Name
Call To Action: Priority
Account: GS Exec. Sponsor
Account: GS Exec. Sponsor Email
Account: GS Exec. Sponsor Name

5. Setup the following Filters:
• Call To Action: Status, excludes Closed Success, Closed Risk
• Customer Info: Stage includes, 2 Purchased, 3 Kicked Off, 4 Launched, 5 Adopting
• Call to Action: Priority includes R Code Red

This rule looks for all CTAs with Priority = Code Red and Status <> Closed

Note: make sure to add any additional filters necessary in your org; e.g. customers only in a particular stage? a specific tier?

Based on the query results, a CTA is triggered for the Exec Sponsor to reach out. The CTA includes a playbook and a description that leverages our comment token functionality. This rule is scheduled to run every Sunday night. For more on building rules in Gainsight, see Setup Rules, Setup Rule Action Types, and Schedule Rules.

Step 6: Build Code Red Reports

For information on using our Report Builder, see How to Build Basic Reports.

Sample Code Red reports include:
# of Customers on Code Red and Watch

# Current Code Red Customers by Reason

List of Code Red Customers

Code Red Reason Trend

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Step 5: Add a "Code Red" Gainsight Home Dashboard

To review how to build a Gainsight Home dashboard, see this overview document.

Adoption: Running your Code Red Meeting in Cockpit

Run your Code Red meeting in Cockpit (as demonstrated in our Code Red webinar) by opening Cockpit, filtering for Code Red priority, selecting All Owners, and sorting by Renewal Date. By expanding tasks and seeing any comments or Chatter posts on the CTA, you can have a clear picture of a Code Red account’s action plan and status.

Here’s the email we sent our team before we started running our Code Red meeting in Gainsight. Feel free to use this template.

Email Template:

To: Code Red Participants (CSMs, Project Managers, Execs)
Subject: New Code Red Process: Gainsight Cockpit!

Hi Team,

Next week, we’re going to start using Gainsight Cockpit to run our Code Red meeting. Here’s how the meeting will work:

We will open Cockpit, filter for Priority = Code Red, display All Owners, and sort by Renewal Date.

As we go through accounts, we’ll expand the CTA tasks section so we can clearly see tasks, due dates, owners, and progress on previous tasks. We’ll also look at the Chatter feed in the sidebar for each CTA to see the latest posts there. We will immediately create and assign any additional tasks that come up during the meeting.

This process will rely on you for the following:

• You must have an open CTA with Priority = Code Red for an account to be considered Code Red
• Use the CTA Due Date to indicate your Go-Green Date
• Use the CTA Reason to indicate the primary reason this customer is on Code Red
• Before the meeting, make sure previous tasks are updated and new tasks are created and assigned.
• Before the meeting, post a short summary to the CTA Chatter feed with any key updates and a temperature trend.
• If new tasks get identified during the meeting, add them to the CTA and assign an owner and due date.