

Save Plays

What to do, and say, when a renewal is at risk

Free sample: 3 complete plays. From Draft First. Written by a customer success and support lead.

Welcome

Most advice for this moment is a set of email templates sorted by stage. Templates help when you already know what's wrong. The hard part of a save is that you usually don't. "Too expensive" can mean they don't use it, a cheaper tool does the part they use, the budget really shrank, a new boss wants a change, or it never became part of how they work. Each needs a different move, and the wrong one costs you money and the account.

So this book is sorted by situation. Each play starts with what you're hearing, tells you what's often going on underneath, gives you the move, the words to say on the call and in writing, the decision rules, what to watch for and an agent prompt that gathers the facts before you pick up the phone.

Three ideas run through all of it. Diagnose before you discount. Decide your concessions and your floor before the conversation, not during it. And know when to stop: the walk-away line in Play 23 is as much a part of saving accounts as anything else here.

The full playbook has 25 plays

- 1. Diagnose before you discount (in this sample)
- 2. The polite reasons decoder
- 3. Map who decides now
- 4. Dark after kickoff
- 5. Pause on purpose
- 6. Go-live slipping
- 7. Usage slide, no complaints
- 8. Champion left (in this sample)
- 9. New exec with a new broom
- 10. Inherited book
- 11. Price increase, told live
- 12. The concession ladder
- 13. Budget cut, still happy
- 14. Procurement takes over
- 15. They're trialing a competitor
- 16. The RFP surprise
- 17. "Your competitor offered us less"
- 18. Silent before renewal
- 19. Auto renewal with no answer
- 20. Paperwork stuck in their legal
- 21. A risk flag leadership can't ignore
- 22. Exec to exec, done right
- 23. The walk-away line (in this sample)
- 24. The good goodbye
- 25. Win-back with a reason

This sample has three complete plays. The full playbook has all 25, a diagnosis map, the five real reasons table, a worked save from start to finish, six templates and worksheets, decision tools with starting defaults, worked judgement calls, two failed saves, bad agent drafts with the errors marked, a save rate worksheet, and an agent prompt for every play.

Diagnose before you discount

SITUATION	The customer says price is the reason they are leaving or downgrading.
SIGNAL	"It's too expensive", a downgrade request, or a discount request before you've had the renewal conversation.

What's really going on

It helps to sort "too expensive" into one of the five reasons from the table at the front of the book before you respond.

Value: they aren't using enough of it to justify the cost. Substitute: something cheaper now does the part they use.

Budget: the money really did shrink, and they would keep you if it hadn't. Politics: someone new wants a change, or a rival team wants their own tool. Adoption: the product never became part of how they work. Each one needs a different move, and a discount only helps with budget, and only partly. Discount a value problem and you have lowered the price of something they still don't use. You'll have the same conversation next year at a lower number.

The move

1. Don't answer the price on the first call. Thank them, say you want to understand the whole picture, and agree a date to come back with options.
2. Before the next conversation, pull the facts: who logs in, which features they rely on, what they paid for and never switched on, and the ticket history.
3. Ask the two questions that do most of the work: what has changed since they signed, and what would they do instead if they didn't renew.
4. Sort what you hear into one of the five reasons and write it in your save log, with the words they used.
5. Run the play for that reason: value goes to Play 7, substitute to Plays 15 and 17, budget to Play 13, politics to Plays 3 and 9, adoption to Plays 4 to 6 (or Play 7 if usage is sliding).
6. Only then talk numbers, using the concession ladder in Play 12.

Say it like this

WHEN PRICE COMES UP

Thanks for being straight with me. Before I go back to my team about price, I want to understand the whole picture. If price is the only issue, that's one conversation. If something else changed, it's a different one, and I'd rather have the right one. Can I ask you a few questions?

THE TWO QUESTIONS

What's changed for your team since you signed? And if you didn't renew with us, what would you do instead? Another tool, build something yourselves, or go without?

WHEN THEY INSIST IT'S JUST PRICE

That's fair, and I'm not trying to talk you out of it. Help me with one thing. If the price were the same as last year, would you renew as is? If yes, this is about budget and I can work with that. If you'd still want changes, I'd rather hear them now than after we've agreed a number.

Decision rules

- If they would go without the product entirely, it's a value problem. Fix value before you touch price.
- If they name a specific alternative, it's a substitute problem. Compare scope, not price.
- If they would renew happily at last year's price, it's budget. Go to Play 13.
- No discount on the first call. Promise options by a named date instead, and keep the date.

Watch for

- Leading with a discount. It teaches the customer that threatening to leave is how you get a better price.
- Asking "why" over and over. It sounds like a cross-examination. Ask what changed, then be quiet.
- Logging "price" as the churn reason when you know it isn't. Your save log is only useful if it's honest.

Agent draft prompt

Paste after the standing rules from the front of the book. The agent drafts; you check and send.

Prepare a save brief for [account name] before my call on [date].

Read: [CRM record], [ticket export, last 12 months], [usage report].

Give me, in this order:

1. Contract basics: renewal date, current amount, term, plan or seats. Tag anything not in the CRM [CONFIRM].
2. Usage: which teams and features were active in the last 90 days, compared with the first 90 days after signing.
3. Tickets: the top three themes, anything still open, anything that took more than one reopen.
4. Evidence for each of the five reasons (value, substitute, budget, politics, adoption). Quote the source for each point. If there's no evidence for a reason, write "no evidence found".
5. Three open questions I should ask on the call.

Do not recommend a discount or a price. Do not guess at reasons the data doesn't show.

CHECK THE DRAFT BEFORE IT GOES ANYWHERE

- Every reason in the brief has a quote and a source next to it. A reason with no quote is the agent's guess: delete it or mark it.
- The usage numbers match the report you gave it. Spot-check two of them by hand.
- No price, discount or offer appears anywhere. If one does, the agent ignored the standing rules; start again.

PLAY 8 OF 25

Champion left

SITUATION	Your main contact has left the customer's company or moved to a different role.
SIGNAL	An email bounce, an out-of-office that names someone else, or news that they've moved on.

What's really going on

Your champion carried the story of why they bought you. When they leave, the story leaves with them. The new owner inherited a tool they didn't pick, a budget line they have to defend, and no memory of the problem it solved. They are not against you; they just have no reason to be for you yet. Treat it as a fresh onboarding, and move within days, before someone else fills the gap with their own story.

The move

1. Within a few days, find out who has taken over the work and who now owns the budget. Ask the remaining users if you have to.
2. Send the new owner a short note and a one-page recap: why they bought, what has happened since, what's open, and what's coming up.
3. Ask for a short call to listen, not to pitch. Their priorities may be different.
4. Update your decision map (Play 3). The roles have moved.
5. If your old champion is still reachable at their new company, thank them. Don't ask them to fight for you from outside.

Say it like this

FIRST NOTE TO THE NEW OWNER

[Old champion] was our main contact, and I'd like to make sure you have everything they had. I've put together a one-page summary of what your team uses us for, what's open and what's coming up. Could we take 20 minutes so I can hear what matters to you?

OPENING THE CALL

I'm not here to sell you on anything. You've inherited this, and I want to understand what you need from it, which might be different from what [old champion] needed.

IF THEY SAY THEY'LL REVIEW EVERYTHING

That's fair, and I'd expect nothing less. What would you want to see from us to make that review easy?

Decision rules

- Move within days. The longer the gap, the more likely they hear someone else's version first.
- If nobody can tell you who owns it now, escalate inside your company: the account is unowned on their side, and that's a real risk.
- If the new owner wants to rethink the setup, help them. A re-scoped renewal is still a renewal.

Watch for

- Pitching before listening.
- Asking the new person to defend a purchase they didn't make.
- A long welcome pack. One page. They can ask for more.

Agent draft prompt

Paste after the standing rules from the front of the book. The agent drafts; you check and send.

Draft a one-page value recap for [new contact name] at [account name], who has taken over from [old champion].
Read: [CRM record], [ticket export], [usage report], [QBR notes or decks].
Sections: Why [account name] bought (from the sources only), What your team uses today, What we've fixed or delivered this year, What's open, What's coming up (renewal date and anything due).
Under 300 words. Plain words. Tag every number, date or outcome not stated in a source [CONFIRM]. Then draft a 3-sentence intro email that offers the recap and asks for 20 minutes.

CHECK THE DRAFT BEFORE IT GOES ANYWHERE

- Every result in the recap appears in a source you can point to. Delete any the agent "summarised" into existence.
- Open items are listed honestly. A recap with nothing open reads as a sales page.
- Nothing about why the old champion left.

PLAY 23 OF 25

The walk-away line

SITUATION	A save is dragging on, and the concessions keep growing.
SIGNAL	A third round of asks without the customer moving, or a deal that's now worse than letting it go.

What's really going on

Without a floor decided in advance, every round of negotiation feels like the last one, and you keep giving. At some point the deal costs more than it's worth: in margin, in support load, in the precedent it sets for every other customer. A walk-away line, written down before talks begin and approved by your leadership, lets you stop calmly. Saying it kindly, with an offer to make their exit easy, often moves things more than another concession would.

The move

1. Before the negotiation starts, write your floor on the walk-away form: the lowest acceptable deal, and the reasons.
2. Test the floor three ways. Cost: below what deal does this account cost more to serve than it brings in? Ask finance or your leader for the inputs; don't guess. Precedent: would you be comfortable if every customer of this size heard about this deal? Next year: if you agree this, does next year's renewal start from an even weaker place?
3. Get your floor approved by whoever owns the decision.
4. When you hit it, say so plainly and kindly. Don't bluff.
5. Offer a smooth exit if they choose to go (Play 24).
6. Then stop. Don't follow your walk-away with another concession.

Say it like this

SAYING IT

I've gone as far as I can on this. [The offer] is our best. I'd really like you to stay, and if it doesn't work for you, I'll make sure your exit is smooth and nothing gets lost.

IF THEY PUSH AGAIN

I understand. I'm not able to go further, and I don't want to promise something I'd have to walk back. Take a few days if you need them. I'll check in on [date].

IF THEY SAY YES

Thank you. I'll send the paperwork today. I'm glad we're going to keep working together.

Decision rules

- Decide the floor before talks, not during.
- Never bluff a walk-away. If you'll move again, it isn't your floor.
- If the floor fails any of the three tests, raise it with your leader before the call, not after.
- If they leave at the floor, that's a decision, not a failure. Log it honestly.

Watch for

- Floors that move every time the customer pushes.
- Saying it angrily or as a threat.
- Making the exit hard to punish them for leaving.

POLICY CHECK | NOT LEGAL, HR OR CONTRACT ADVICE

Your floor and any final offer must be approved under your company's pricing and approval policy. Contract terms for exit, data return and notice follow the contract and your company's policy.

Agent draft prompt

Paste after the standing rules from the front of the book. The agent drafts; you check and send.

Help me fill in my walk-away form for [account name].

Read: [deal notes], [CRM record], [list of concessions offered so far].

1. List every concession offered so far, with date, from the notes.
2. Summarise the customer's current ask, quoting the source.
3. Fill in my form [paste form] with what you found. Leave the floor and the reasons for me to fill in; don't suggest numbers.
4. Draft a short, kind walk-away message (under 80 words) that states [final offer: my input] and offers a smooth exit.

CHECK THE DRAFT BEFORE IT GOES ANYWHERE

- The agent has left the floor and the reasons blank. If it filled them in, delete them.
- Every past concession is listed with a date. The list is the reason you need a floor.
- The walk-away message offers a smooth exit and contains no threat.

Liked these?

The full playbook has 22 more plays like these, sorted by the situation you're in, plus the save call talk track, the concession ladder and walk-away worksheets, and the save log. All sales are final.