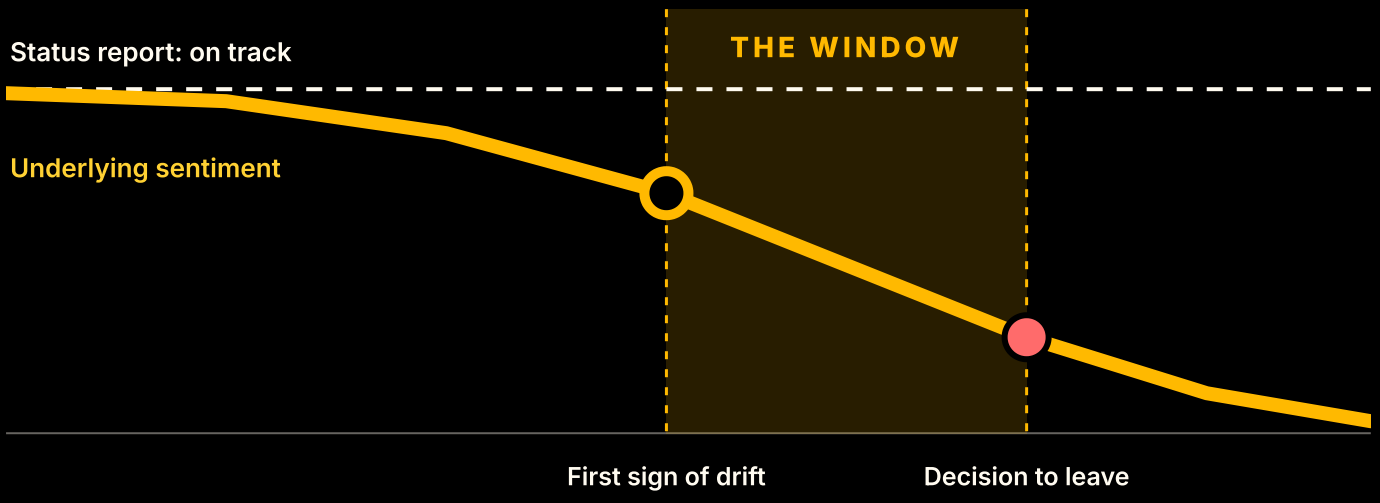
THE CLIENT HEALTH PLAYBOOK · KAIZAN

See client risk before it's too late.



How teams that solved the problem did it, what the benchmark says separates slipping accounts from healthy ones, and a plan you can start today.

Most client teams learn a client is unhappy too late to change the outcome.

The cause is rarely a lack of care. It is how relationship health gets measured: monthly, from memory, one account manager at a time.

The warning signs usually exist well before the loss. In Kaizan's Client Service Benchmark 2026, struggling accounts were not silent: **10 of the 26** in the bottom cohort raised the same risk across several periods, in calls and emails that nobody joined up.

10 of 26 bottom-cohort accounts raised the same risk across several periods

Clients also notice a lack of initiative. In RSW/US's 2024 outlook survey, 45% of marketers named lack of proactivity as the top reason they reviewed an agency.

45%

of marketers: lack of proactivity was the number one reason they reviewed agencies

THIS PLAYBOOK COVERS THREE THINGS

How teams that solved the problem did it

What the benchmark says separates slipping accounts from healthy ones

A plan you can start today with the tools you already have, or automate with Kaizan

Five findings that shape everything that follows

01 **You cannot be proactive about what you cannot see.**

Scattered channels, monthly reports and individual memory hide drift until it is obvious.

02 **Frequency matters more than breadth.**

Top and bottom accounts engage a similar share of their decision-makers (52.7% and 50.0%). Top accounts engage them about twice as often.

03 **Quiet is a warning sign.**

Top accounts log 2.2 times more risks than bottom accounts (15.3 against 6.9 per year). A clean risk register on an active account usually means nobody is listening.

04 **Measure before you try to move the score.**

Where satisfaction is measured, top and bottom accounts score the same, 7.1. Top accounts are measured 41 times a year, bottom accounts 14.

05 **Define what at-risk looks like.**

When the definition lives in a few senior heads, nobody else can act on it consistently.

HOW TO READ THE NUMBERS IN THIS PLAYBOOK

● **Top cohort: CSAT and revenue grew** ○ **Bottom cohort: CSAT and revenue declined**

Benchmark figures cover 12 months across more than 1M calls, 10M emails and thousands of chat messages, all anonymized.

Teams find out when it is too late

Client loss is rarely a surprise to the client. It is a surprise to the supplier.

In discovery conversations with agency and consultancy leaders, one struggle came up more than any other: clients do not say they are unhappy until the decision is effectively made. Two leaders put it this way.

> **Clients are not always very honest. They often don't tell you they're unhappy until they're... way too late.**
>
> Head of Client Services, Agency Client E

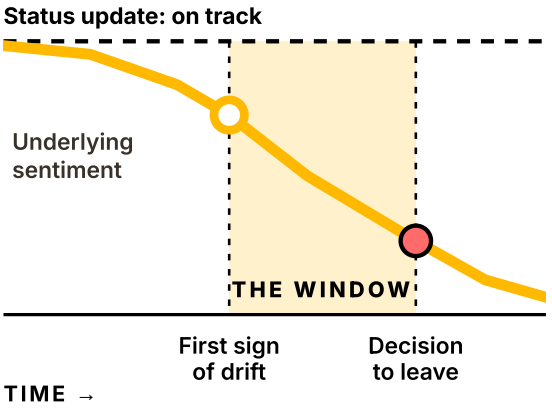
> **We're always kind of lagging behind when it comes to issues.**
>
> Head of Client Services, Agency Client F

A third, at a consultancy, linked the same gap directly to past client losses: early warning signs were there and were not caught in time.

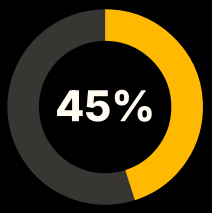
RELATIONSHIPS ERODE; THEY RARELY SNAP

A group account director at Agency Client B describes how it looks from inside an account team. The client becomes a little less engaged. Feedback gets vaguer. The partnership slides from strategic to transactional, and nothing is said. By the time the problem is obvious, the team is already on the back foot.

An agency owner at Agency Client D names the same thing: “an underlying sentiment that is often missed in client relationships.” Status updates say a project is on track. The sentiment underneath says otherwise.



WHY A LACK OF PROACTIVITY ENDS RELATIONSHIPS



of marketers said lack of proactivity was the number one reason they reviewed agencies, in the RSW/US 2024 New Year Outlook.

That is a bigger trigger than any single failure. The implication is that proactivity is a visibility problem. A team that cannot see a quiet stakeholder, a repeated concern or a shift in the client's market cannot act on it first. The client reads that as a lack of initiative.

THE WINDOW

Time to act.



Between the first sign of drift and a client's decision to leave, there is a window. Visibility gives you the opportunity to act while it's still open.

Why the old process cannot catch it in time

Four structural weaknesses mean a monthly status report will miss drift however diligent the team is. None of them is about effort. Each is about the timing, evidence, scale or source of what you know.

1 Monthly, not continuous

A once-a-month RAG rating is a snapshot, not a signal. By the time it is updated, sentiment has already shifted.

The benchmark shows the cost of looking rarely. Where satisfaction was measured, top and bottom accounts scored the same (7.1). But top accounts were measured 41 times a year and bottom accounts 14, about 2.9 times less often.

Top cohort: 41 checks a year

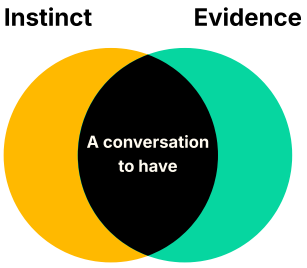
Bottom cohort: 14 checks a year

About 2.9 times less often

2 Subjective, not evidenced

Status is usually one manager's gut feel, from memory. Instinct is valuable, and experienced account directors can usually feel when something is off. What they lack is confirmation: how engaged the client is, how often the team is really interacting, and what the sentiment is underneath the polite update.

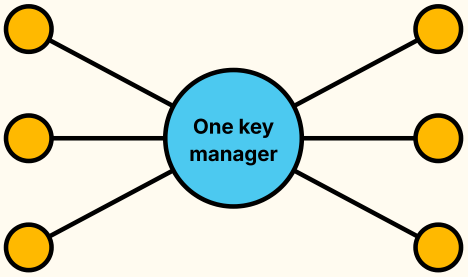
Evidence does not replace judgment. It turns a hunch into a conversation the team can have, and gives a junior account manager the same footing as a senior one.



3 Manual, not scalable

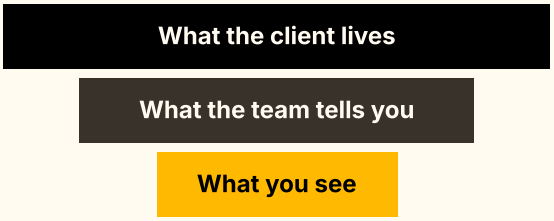
Staying informed through 1:1s, Slack-scanning and Google Alerts works for five accounts. As one head of client services put it: “It's impossible to sort of scale in an effective way.”

A manual process leaves most accounts depending on one or two diligent people, so losing a single key account manager can leave their accounts without cover.



4 Filtered, not first-hand

Leaders usually see what their teams, or their clients, choose to tell them. That is a filtered version of reality. It gets worse as the business grows, because conversations spread across email, calls, Teams and Slack and each person sees only the threads they were on.



FOUR QUESTIONS TO TEST YOUR OWN PROCESS

1. When the status of your most important account last changed, how many days passed before you heard?
2. For every amber or red account, can you point to the call or email that justifies the rating?
3. If your busiest account manager left tomorrow, what would the team still know about their accounts?
4. For your top ten accounts, who has seen every channel the client uses?

If any answer is uncomfortable, the problem is the system, not the people.

What the best client teams do differently

These five habits come from client service leaders who solved the problem in practice. None of them started with a perfect system. They started by changing one habit. Each habit below comes with the trap that catches teams who adopt it half-heartedly.

1

Centralize every channel into one view

PRACTICED BY AGENCY CLIENT A

When client conversations spread across Teams, Slack, email and meetings, no single person has the full picture. Relationship health gets reconstructed from memory. Agency Client A's managing director described exactly this: conversations on so many platforms that nobody had visibility of client health.

HOW TO START

List every channel a client touches, then decide where the combined view will live.

THE TRAP

Centralizing storage without reading it. A shared folder of notes is one more place to forget to look. The goal is a view of the account, not an archive.

2

Standardize the process across every team

PRACTICED BY TRADEDOUBLER, 3,500+ CLIENTS

Your strongest account managers already notice drift and follow up fast. The goal is a shared process that works the same way for a junior account manager as for your most senior one.

HOW TO START

Agree one weekly review format and one set of health dimensions for every account.

THE TRAP

Standardizing the report instead of the judgment. A uniform template filled in from memory is still memory.

3

Reinvest time saved on admin into watching

PRACTICED BY AGENCY CLIENT B

Cutting manual admin only helps if the freed time is deliberately redirected. Point it at early signals: reduced engagement, vaguer feedback, a shift from partnership to transactional.

HOW TO START

Decide in advance where the first hour saved each week goes, for example reading the accounts that changed since last week.

4

Watch for underlying sentiment, not status

PRACTICED BY AGENCY CLIENT D

A client can report a project as on track while losing confidence in the relationship. In the benchmark, even the struggling bottom cohort scored above 7 on CSAT: satisfied but not delighted, even in trouble. A respectable score can sit next to a relationship in difficulty.

HOW TO START

In each weekly review, ask for every key account what the tone is underneath the update, and which call or email showed it.

THE TRAP

Treating a polite or collaborative tone as safe. A client who raises concerns calmly can still be signaling risk, and a client who is polite but disengaged almost certainly is.

5

Make “at risk” a shared definition, not tribal knowledge

A COMMON PATTERN ACROSS ALL FOUR ORGANIZATIONS

In most teams the definition of a healthy account lives in a few experienced heads. Write down what at risk looks like as a shared framework and the whole team, and any AI helping them, can act on it consistently.

THE TRAP

A definition so long that nobody uses it. Keep it to one page.

WHICH HABIT FIRST?

Start where it hurts.

If you cannot see what is happening across accounts — START WITH HABIT 1

If every manager assesses health differently — START WITH HABIT 2

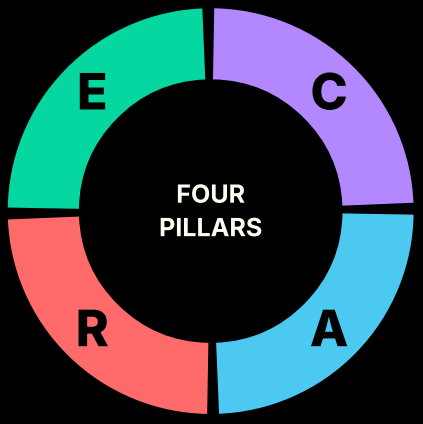
If admin stops you watching for early signals — START WITH HABIT 3

If you keep being surprised despite green reports — START WITH HABIT 4

If only a few people know what at risk looks like — START WITH HABIT 5

Why CARE : a leading indicator, not a retrospective score

CARE is Kaizan's framework for client relationship health. It gives a structured, multidimensional view of where every account stands, and it's built to show where a relationship is heading while there is still time to act.



Know before the renewal. Know before the escalation.

It's informed by Kaizan's benchmark analysis of more than 1M calls, 10M emails and thousands of chat messages. Each of its four pillars is assessed independently, because strength in one does not make up for weakness in another.

C	A	R	E
Client Satisfaction	Activity with Stakeholders	Relationship Strength	Expansion Opportunities

ONE DESIGN IDEA WORTH KNOWING

1 Single-threaded relationships, where one person on each side carries the account, are a structural vulnerability. **CARE** surfaces them before they become critical.

The four pillars

Each pillar is assessed on its own. A single blended score would hide which lever moved.

C

Client Satisfaction

How does the client feel about the work, the partnership and the outcomes?

IT LOOKS AT

- Client sentiment
- Team understands the client's market
- Work connects to client objectives
- Commitments delivered
- Problems raised by the team first, or found by the client

A

Activity with Stakeholders

Are the right conversations happening, with the right people, at the right quality?

IT LOOKS AT

- Response time
- Coverage of key stakeholders
- Recency of decision-maker contact
- Time invested against what the account warrants
- Recency of meaningful contact
- Contact spread across the team

R

Relationship Strength

Not just whether contact is happening, but what kind.

IT LOOKS AT

- How often risks are raised, and whether that is rising
- Whether the team visibly listens
- Advocacy signals from the client
- Sentiment direction over 30, 60 and 90 days
- How open and strategic conversations are

E

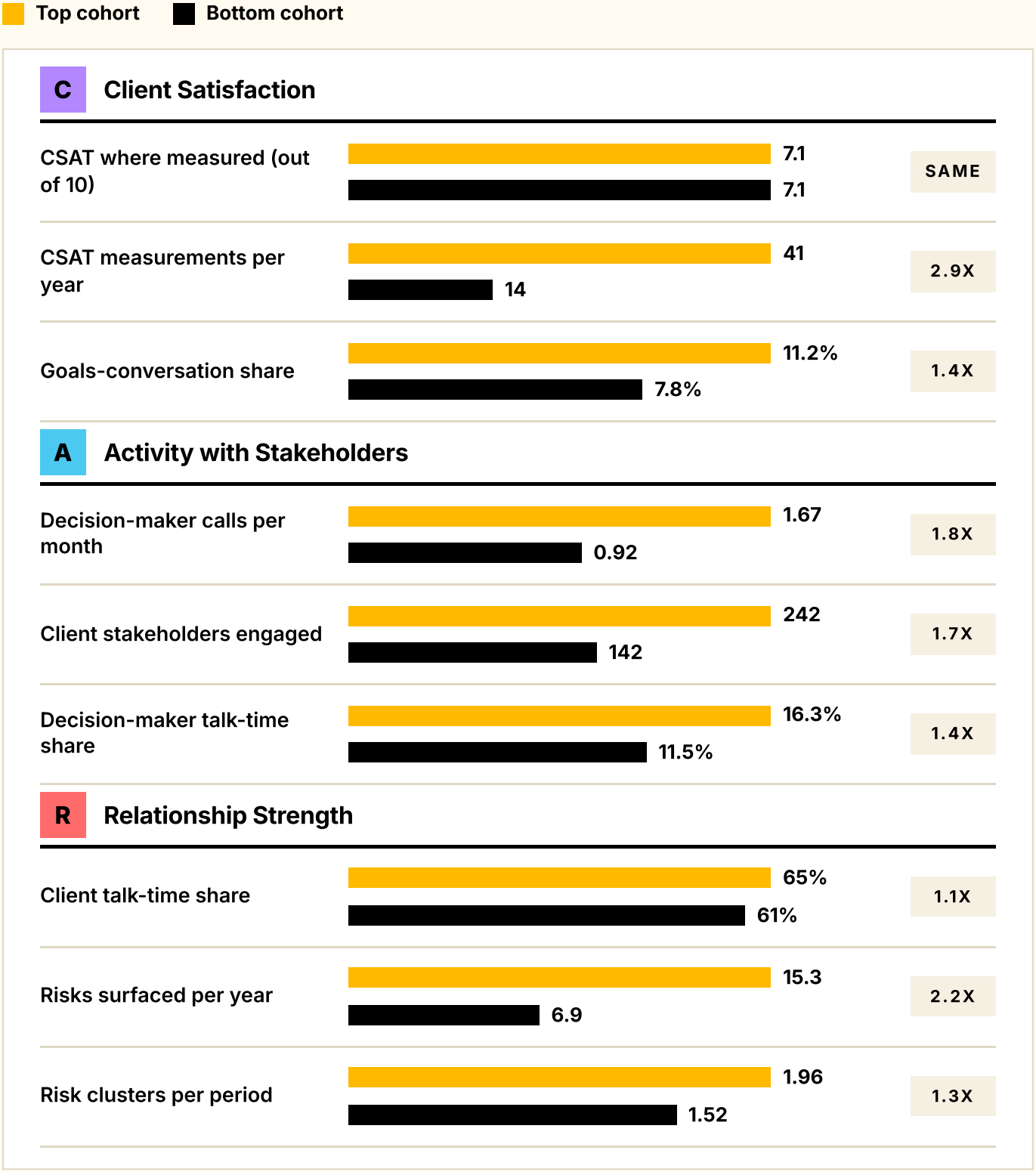
Expansion Opportunities

Are the conditions right to grow this relationship, and is the team acting on them? Expansion depends on the other three pillars being healthy.

IT LOOKS AT

- Market signals from the client
- Additional services discussed recently
- Team brings insight nobody asked for
- How pushback is handled
- Whether the relationship can support a growth conversation

Top and bottom accounts, side by side



Bars in each row are scaled to the larger value. Source: Kaizan, The Client Service Benchmark 2026, Vol. 01, May 2026, Part Two.

Findings worth reading carefully

1

The CSAT gap is a measurement gap.

Where satisfaction is measured, top and bottom accounts score the same, 7.1. Top accounts are measured 41 times a year against 14. The first action to move CSAT is to measure it.

2

More logged risk is a good sign.

Top accounts surface 2.2 times as many risks (15.3 against 6.9 per year). Their conversations are richer, so more risks surface, and risks come back and get resolved. A quiet register on an active account is the warning sign.

3

Decision-makers: frequency, not breadth.

Both cohorts engage about half the decision-makers they have defined (52.7% against 50.0%). Top accounts run 1.81 times as many decision-maker calls (1.67 against 0.92 a month) and 2.06 times as many emails (45.7 against 22.1).

HOW MUCH MORE THE TOP COHORT DOES

Risks surfaced per year — 15.3 against 6.9



2.2x

Decision-maker emails — 45.7 against 22.1



2.06x

Decision-maker calls a month — 1.67 against 0.92



1.81x

THE SAME IN BOTH COHORTS

7.1

CSAT where measured, in both cohorts

~50%

of defined decision-makers engaged in both cohorts (52.7% and 50.0%)

What the benchmark skips in this report

Some measures are not in this edition.

- Sentiment trajectories
- CSAT recovery time
- Themes resolved per quarter
- Trust recovery time
- Commitment completion rates
- Active-listening signals

THREE QUESTIONS LEADERS ASK

Why not just track CSAT?

Because CSAT alone cannot tell you why a score is what it is, or how often it was checked. CARE keeps satisfaction, activity, relationship strength and expansion separate, so you know where to act.

Why four pillars, not one score?

A single blended score hides which lever moved. Four independent pillars mean strength in one can never mask weakness in another.

Why continuous, not periodic?

Continuous assessment of every call and email turns frequency from a resourcing problem into a default.

Tradedoubler: standardization at scale

Derek Grant, VP Operations and General Manager UK/US. A global affiliate marketing platform.

20% increased efficiency

3,500+

CLIENTS IN ONE VIEW

THE CHALLENGE	Thousands of clients across territories, languages and stakeholder groups. A proper overview of the client base was, in Derek's words, very difficult. Teams spent significant time writing summaries, tracking follow-ups and reporting on activity.
WHAT THEY DID	They used Kaizan to standardize how every team captures and tracks client activity, giving one consistent process and a single view across the portfolio.
RESULT	3,500+ clients visible in one consistent view.

THE LESSON **Standardization gave every team the same view of every client, so nobody had to rely on someone else's memory.**

Agency Client A: unified client intelligence

Managing Director. A global performance marketing agency.

Risk visibility

ACROSS EVERY COMMUNICATION CHANNEL

THE CHALLENGE	As the agency scaled, client conversations spread across Teams, Google Workspace, Outlook and Slack. Each team member saw only the part of a relationship they were personally on. There was no single source of truth for how a client was really doing.
WHAT THEY DID	Used Kaizan to analyze engagement across every platform in one place. Every account manager now sees the same complete picture, whoever was on which thread.
RESULTS	Full visibility across every communication channel. Earlier identification of risk and expansion opportunities. The team has spotted "high-risk clients that potentially were going to leave" on numerous occasions.

"We see AI as critical to the future of our business, not just across client servicing, but across every facet of the business." MANAGING DIRECTOR, AGENCY CLIENT A

THE LESSON **The managing director names retention as the most significant business impact, because seeing risk earlier gives the team room to act.**

Agency Client B: catching drift early

Group Account Director. A global B2B marketing agency.

Prevention

ACTION BEFORE A CLIENT GOES COLD

THE CHALLENGE	Client relationships rarely break in one moment. They erode quietly: a client becomes a little less engaged, feedback gets vaguer, and a partnership slides from strategic to transactional before anyone names it.
WHAT THEY DID	Used AI to take on manual, lower-value work, and deliberately reinvested that time in watching for early signs of drift. The CARE client health scoring confirms what instinct suggests and clarifies misleading hunches with real data. The director is "quite obsessed with the scoring."
RESULT	The team acts before a relationship has gone cold, not after. The CARE score proactively suggests the next best actions to prevent a lost client based on 11M+ points of agency data.

THE LESSON

A score earns its place only if it prompts an action. The question the director asks of every score is what can be done to improve it. Instinct is not replaced; it is confirmed and sharpened.

Agency Client C: replacing subjectivity with a source of truth

Head of Biddable Media. A large independent B2B marketing agency.

1 view for leadership

OF DAY-TO-DAY ACCOUNT ACTIVITY

THE CHALLENGE	Leadership needed to know what was really happening across the book of business. Visibility depended on what teams, or clients themselves, chose to report: a filtered version of reality, not a source of truth.
WHAT THEY DID	Treated AI as infrastructure rather than a novelty layered on top of existing process. Kaizan now gives leadership direct visibility into day-to-day account activity.

"Now I have a much greater visibility into what's going on day-to-day, without the subjectivity of what my teams or even our clients are telling me." HEAD OF BIDDABLE MEDIA, AGENCY CLIENT C

THE LESSON

The leader's problem was not effort but distance. A direct view of activity removes the filter without adding a layer of checking.

Four starting problems, one pattern

Each changed one habit and replaced somebody's memory with a view the whole team could use.

Tradedoubler	STARTING PROBLEM Thousands of clients, no overview	HABIT CHANGED Standardized how every team captures and tracks activity	REPORTED OUTCOME **3,500+ clients in one view** **20% increased efficiency across the business**
Agency Client A	STARTING PROBLEM Signals split across four platforms	HABIT CHANGED One place for every channel	REPORTED OUTCOME **Earlier risk detection & prevention**
Agency Client B	STARTING PROBLEM Quiet erosion between check-ins	HABIT CHANGED Reinvested admin time in watching for drift	REPORTED OUTCOME **Earlier action on relationships**
Agency Client C	STARTING PROBLEM Leadership saw a filtered view	HABIT CHANGED Direct visibility of day-to-day activity	REPORTED OUTCOME **Decisions based on activity, not summaries**

Build your own account picture

This playbook shows you how to build an accurate, evidence-based picture of any account with the tools you already have. It's based on a simplified version of Kaizan AI's agency modeled intelligence which can prevent on average 45% of your at-risk clients from leaving.

STEP 1

Gather the context

An accurate picture needs more than a RAG status. For each account, find:

People

- [ ] **Stakeholder map:** decision-makers, champions, detractors, and who has joined or left
- [ ] **Last contact per stakeholder**, and how often you speak to each one

Commitments

- [ ] **What was promised, by both sides,** and what is overdue
- [ ] **Client goals and objectives** as they last stated them

Conversations

- [ ] **Call transcripts** from the last 30 days, or your most detailed notes. Summaries lose tone, repetition and passing comments, which is often where risk shows up first
- [ ] **Email threads** with the client, across everyone on the account
- [ ] **Ad hoc and in-person conversations:** what was said at the event, over coffee, on the quick call
- [ ] **Internal chatter:** Slack or Teams threads and DMs about the account

Commercials

- [ ] **Contract value, scope, renewal date and notice period**
- [ ] **Scope versus effort:** hours burned against what was sold
- [ ] **Open opportunities and expansion conversations**

Judgment

- [ ] **The team's gut feel,** written down
- [ ] **A baseline:** how this account compares with the rest of your client portfolio

Signals

- [ ] **Risk signals:** repeated concerns, a change in tone, canceled meetings, fewer attendees
- [ ] **Growth signals:** new needs, teams, markets or budget mentioned
- [ ] **Changes on the client side:** new leadership, a restructure, procurement, a pitch review
- [ ] **Changes on your side:** account lead or team moves
- [ ] **Delivery performance** against agreed KPIs

STEP 2

Run it through AI

There are two ways to get the context into your generic AI tool:

Paste it in

Copy everything from Step 1 into the chat.

Connect your tools

If your notetaker, inbox, Slack and CRM have MCP connectors, link them and ask the AI to pull the last 30 days for the account.

THEN USE THIS PROMPT

```
You are a client success lead preparing an account review for senior leadership. Using only the context provided, produce:

1. Health status (Red / Amber / Green) with the three pieces of evidence behind it
2. Retention risk: what could cause this client to leave or reduce spend, and how likely it is before renewal
3. Revenue on the table: expansion opportunities, estimated value, and when they could realistically close
4. Stakeholder coverage: who we are engaging, how often we speak to decision-makers, who has gone quiet, and who we are missing
5. Sentiment trend: is the relationship improving, flat or declining over the last 3 months? Cite the calls or emails that show it
6. Relationship quality: how often has the client named a goal, and how often have we brought in an outside perspective (market, competitor or sector insight)?
7. Key moments: any risk, praise or expansion moments in the period, who said them, and when
8. Open commitments that could damage the relationship if missed
9. Escalations leadership needs to act on, and who should own each one
10. Next steps for the next 30 days

Flag any area where the context is missing or too thin to judge. Do not fill gaps with assumptions.

[PASTE CONTEXT HERE, OR NAME THE ACCOUNT FOR CONNECTED TOOLS TO PULL]
```

A NOTE ON USING A GENERIC AI TOOL INSTEAD OF KAIZAN AI

AI on its own is not a churn plan.

Using a generic AI instead of Kaizan does not give you a proven plan for preventing churn. A general-purpose AI has no learned knowledge of what works: it reads the context you give it, but it has never seen which actions keep clients and which ones lose them. Kaizan has as it's an AI tool specialized for client service teams in the professional services sector. CARE is re-tuned every week against real won, kept and lost outcomes, and its recommendations draw on 11M+ million client service data points.

STEP 3

Keep it current

One review is a snapshot. To make it a signal, repeat Steps 1 and 2:

Every week

Because risk moves faster than a monthly RAG update.

For every account

Using the same method, so results can be compared.

With a named owner

For every flag, acting within the same week.

THE UPKEEP MATH

	Your numbers
Accounts in your client portfolio	___
× Sources per account (Step 1 has 10+)	___
× Minutes to find and paste each source	___
= Minutes per week	___

AN EXAMPLE

At 20 accounts, 10 sources and 5 minutes each, pasting takes

16+ hours a week

That is before anyone acts on what they find. Connecting your tools cuts that down, but someone still has to run it, check it and keep it working.

Keep it supportive Visibility is not surveillance. Introduce this as a way to back up good judgment and spread what your best account managers already do. Teams that see it as policing stop recording the signals it depends on.

Already have the tools?

Decisions that prevent risk need AI client intelligence built on proven data.

Without it, your actions are not based on what is proven to work, and you cannot predict what is likely to happen next. An unspecialized, generic AI tool cannot give you proven next best actions based on data and predictions.

"We have a notetaker."

Great, that's your transcripts covered. You still need emails, Slack, CRM, commitments and stakeholder history, pulled together per account, every week. A notetaker also can't record meetings it isn't invited to.

"We'll connect everything to Claude."

It beats copy-paste, but:

It only runs when asked
There are no alerts, so risk only surfaces if someone thinks to check.

It has to guess which data belongs to which client
Emails, channels, contacts and deals get matched to the account on every run, and some get matched wrongly.

It only sees your own access
Your inbox, not your colleagues' conversations with the same client.

It has no memory
Every run starts again, with no history and no "this concern has come up three times".

Scoring isn't consistent
The same account can come back amber on Monday and green on Thursday.

There's no baseline
You can't compare against the rest of your client portfolio.

Someone has to maintain it
Connectors, permissions, prompts and data-security sign-off all need an owner.

WHERE IT BREAKS

Missing call context
Without transcripts, the AI is working from memory and notes.

It goes stale
By Thursday, Monday's picture is out of date.

No trend
One run shows where an account is, not where it's heading.

It depends on people
One person forgets one source, and a risk gets missed.

Judgment drifts
Each account manager reads "amber" differently.

It doesn't scale nor improve
Fine for 3 accounts, not for the whole portfolio. Doesn't learn from your data.

Can't suggest proven actions
No client data or predictive intelligence, so only generic actions that give a false sense of security.

No proactive agents
Nothing alerts you or does the work for you.

How to tell it's working

After a month, check:

1. **Decision-maker calls per month** on each top account
2. **Days between a flag and a named action:** the goal is the same week
3. **Accounts with no logged risk:** a quiet account is not always a safe one
4. **Expansion opportunities raised** compared with proposed
5. **CARE score in every area:** check that client satisfaction, activity, relationship strength and expansion have all improved

KAIZAN

Or let Kaizan gather it for you

Everything in Step 1 is already in Kaizan. Calls, emails and ad hoc conversations are captured automatically. Slack, Teams, CRM and project tools are connected and matched to the right client. CARE scores every account the same way, every week.

AND ON TOP OF THE SLT VIEW, YOU GET

Sentiment over time
So you see the direction, not just a status.

Key moments
Flagged as they happen: risk, praise, expansion.

Stakeholder depth
Who's engaged, how often, and who's gone quiet.

Relationship quality
Are you talking about the client's goals and bringing ideas, or just delivering?

Benchmarks
Against your own client portfolio and other Kaizan clients.

Executive summaries
Per client, ready for leadership.

Proactive agents
They alert you and do the work for you, so risks get acted on without anyone having to check.

Working in Claude or ChatGPT? Connect them to the **Kaizan MCP** and your AI starts with the full client picture, already joined up.

The same leadership view, always current, across every client, with proactive agents that do the work for you. No pasting, no prompting from scratch.

What Kaizan is

Client super intelligence for professional services firms. It turns every call, email and signal into the next best action.

WHAT IT IS

AI client success software with proactive helpers that work from day one, scoring every account with CARE and doing the work for you.

Risk Watcher
flags early warnings before a client leaves

Expansion Scout
surfaces upsell signals as they arise

Reply Drafter
writes follow-ups in your voice

QBR Builder
compiles review decks from real conversations

And any other agent you create
that proactively does the work for you

A client service AI brain
that continuously improves with each data point it receives

WHAT IT ISN'T

Not an add-on.
AI is the core of Kaizan, with helpers working from day one.

Not a new app to learn.
It connects to the AI tools your team already uses.

Not an auto-sender.
Follow-ups and replies are drafted for your approval.

Not a note-taker.
It does come with a free Kaizan note-taker.

Not surveillance.
It backs up good judgment and spreads what your best account managers already do.

INTEGRATIONS

Microsoft Teams · Slack · HubSpot · Salesforce · Google Meet · Google Drive · Zoom · Gmail · Outlook · SharePoint · monday.com · Wrike · Jira · asana · ClickUp · Notion

Plus your AI tools, connected over MCP:

ChatGPT · Claude · Copilot · Any MCP-ready AI tool

Kaizan does the work that grows every client.

Protect the revenue you already have, give your team time back, and unlock growth inside current accounts.

WHO IT'S FOR

Senior leadership · COOs · Head of AI or CTO · Account managers · Client service teams

INDUSTRY

Professional services

Averages across Kaizan customers

26%

revenue increase per client

45%

of revenue at risk protected through early signals

5.4 hrs

of admin saved per person, every week

8%

increase in the addressable upsell pool across existing clients

33%

lower cost to serve each client

11M+

client service data points behind Kaizan's recommendations

Start with one account.

Start with Step 1. Gather the context for one account, run it through AI, and see how much of the picture you can build today.

OR SKIP THE MANUAL STAGE

Kaizan 14-day free trial

Put every step in this playbook on autopilot. You will see the risks and growth opportunities for 10 of your clients with recommended actions for free as well as a benchmark on how you compare with industry peers.

Start your 14-day free trial

PUBLIC SOURCES

Kaizan, The Client Service Benchmark 2026, Vol. 01, May 2026 · Kaizan customer averages, kaizan.ai, November 2026 · RSW/US, 2024 New Year Outlook (coverage on vktr.com)