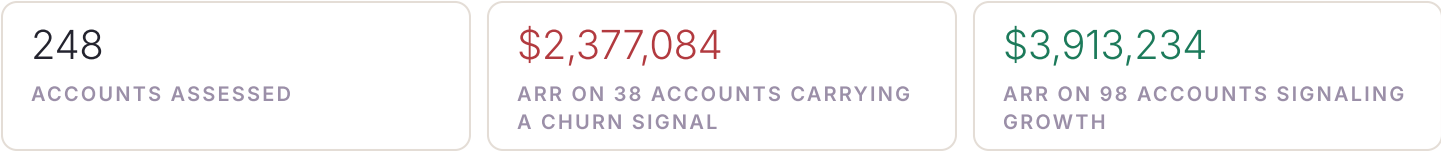


Executive summary

WHAT WE FOUND



Figures reflect the Snapshot. Signals are assessed separately from the health score, so an account can score well and still carry one. ARR is the contract value on the accounts carrying a signal, not revenue expected to be lost or gained; the groups below overlap and do not add.

WHAT COULD MOVE RETENTION OR EXPANSION

- Champion gone quiet.** On 18 accounts the product is in regular use and the contact log records no inbound message in more than 150 days. If those people have moved on, the renewal has no relationship behind it. Evidence: adoption 3.25 or higher; between 153 and 268 days since the last inbound message. **\$958,714** in ARR.
- Champion gone quiet with payment behavior.** 5 accounts record no inbound message in more than 150 days and carry two or more unpaid or disputed invoices, usually because the person who handled the account has moved on. Evidence: between 154 and 284 days since the last inbound message; 2 to 4 open invoices per account. **\$526,675** in ARR.
- Room to add product.** 79 accounts use one platform heavily and hold no second platform on the contract, so a proposal starts from evidence rather than argument. Evidence: more than 40 core actions per active user; Foundations or Keys absent from the contract. **\$3,589,090** in ARR.

HOW CONFIDENT WE ARE

Confidence rates the strength of the evidence behind each pattern, not how serious the pattern is.

PATTERN AND CONFIDENCE	WHY
Champion gone quiet LOW	Kept by hand in the contact log; on 12 of 18 accounts a recent helpdesk ticket is missing from it, so who at the district is still in touch is unresolved. See the Gap List.
Champion gone quiet with payment behavior LOW	Kept by hand in the contact log; on 1 of 5 accounts a recent helpdesk ticket is missing from it, so who at the district is still in touch is unresolved. See the Gap List.
Room to add product MEDIUM	Kept by hand in the account list, present on every account, with no other source disagreeing.

WHAT LEADERSHIP SHOULD DO IN THE NEXT 30 DAYS

- Contact every churn-signal account renewing within 90 days before the renewal conversation starts.**
7 accounts · \$278,256 in ARR · Owner: Account owner · Before each renewal; the earliest is 7 days out.
- Champion gone quiet on the accounts not covered above: send each district a report on its most active schools, so the listed contact has a reason to reply and the district shows who still owns the product, largest first.**
14 accounts · \$728,910 in ARR · Owner: Account owner · Within 30 days.
- Confirm each expansion account renewing within 90 days before any offer, and bring its usage evidence to the renewal.**
22 accounts · \$1,094,898 in ARR · Owner: Account owner · Ahead of each renewal; the earliest is 2 days out.

INSIGHT REPORT OVERVIEW

The customer health score is an average of four weighted categories: adoption, engagement, support and champion coverage. When one of those four categories scores low on an account, the other three hold the average up, so the account can return a composite in the healthy or strong range while a real problem sits inside one category.

Each signal is evaluated separately from the score. A pass or fail test is applied to the underlying data, so wherever the behavior is present the account carries the signal, no matter how it scores overall.

Churn signals

\$2,377,084 ARR WITH A CHURN SIGNAL ACROSS 38 OF 248 ACCOUNTS

\$278,256 ARR ON 7 ACCOUNTS RENEWING WITHIN 90 DAYS

LARGEST EXPOSURE

Northgate Independent School District

\$336,883

customer health score 3.88 · renews in 219 days

Concentrated usage · 88% of lessons in 2 of 30 schools

Champion gone quiet

WHAT THE SIGNAL TESTS

More than 150 days since anyone listed on the account last reached out, on an account with an adoption score of 3.25 or higher.

The adoption threshold keeps the test on accounts that are still using the product. When an account goes quiet and its usage drops, the score already shows it. When an account goes quiet while usage stays high, the score shows nothing, because usage, invoicing and support all read normally and no category measures the relationship itself.

The signal is written to find that second case, where a renewal is approaching and the account has no active relationship behind it. Renewals approached in that position are usually decided on price and procurement terms rather than on delivered value.

RECOMMENDED ACTION

Go back to the district contact with a short account of which schools used the product most last term and what they did with it. A report on the district's own schools is more likely to get a response than another check-in. If it still goes unanswered, ask the district office who now oversees the product, and use any existing relationships at the most active schools to learn who is involved in the renewal.

ACCOUNTS CARRYING THIS SIGNAL

ACCOUNT	RENEWAL	SCORE	ARR
Silverton Public Schools	Aug 14, 2026	3.53	\$10,193
Granite Valley Area School District	Aug 22, 2026	3.71	\$204,547
Ivyton Public Schools	Sep 2, 2026	3.35	\$5,710
Elmridge Public Schools	Nov 4, 2026	3.99	\$9,354
Oakvale Unified School District	Nov 19, 2026	3.12	\$2,400
Underhill Unified School District	Dec 10, 2026	3.77	\$34,099
Millbrook County Schools	Dec 14, 2026	3.77	\$155,942
Brambleton Unified School District	Dec 28, 2026	3.33	\$127,283
Granite Hollow Public Schools	Jan 18, 2027	3.82	\$48,165
Verano Heights Community Schools	Jan 25, 2027	3.48	\$15,926
Dunmore Unified School District	Feb 7, 2027	3.53	\$30,796
Pinehurst Unified School District	Mar 21, 2027	4.06	\$57,950
Granite Independent School District	Apr 23, 2027	4.03	\$4,955
Kingsley Community Schools	May 15, 2027	4.00	\$156,083
Northgate Public Schools	Jun 3, 2027	4.08	\$22,609
Glenmoor Unified School District	Jun 18, 2027	4.00	\$63,678
Stonebridge Grove Unified School District	Jul 12, 2027	3.67	\$6,411
Oakvale Public Schools	date has passed	3.65	\$2,613
Total 18 accounts			\$958,714

Sorted by renewal date. Shaded rows renew within 90 days.

Champion gone quiet with payment behavior

WHAT THE SIGNAL TESTS

The champion test above, plus two or more unpaid or disputed invoices on the same account.

An unpaid invoice on an account with an active contact is usually administrative and gets settled in a message. When nobody is responding, it more often means the person who handled billing has left, or the decision has moved to someone the account team has not met.

RECOMMENDED ACTION

Contact accounts payable rather than the champion. Billing questions get routed to whoever now owns the account internally, which is the person the account team has lost track of. Ask who should be on the invoice going forward, since that answer names the current decision maker without having to ask who replaced the champion.

ACCOUNTS CARRYING THIS SIGNAL

ACCOUNT	RENEWAL	SCORE	ARR
Maple County Schools	Aug 28, 2026	3.59	\$36,672
Granite Unified School District	Nov 21, 2026	4.12	\$88,403
Larkfield Public Schools	Feb 24, 2027	3.82	\$67,060
Pinehurst Public Schools	Jun 20, 2027	3.77	\$195,148
Falls Valley Area School District	Jul 16, 2027	3.90	\$139,392
Total 5 accounts			\$526,675

Sorted by renewal date. Shaded rows renew within 90 days.

No usage during school year

WHAT THE SIGNAL TESTS

More than 90 days with no recorded activity, measured against the in-season calendar so a low-activity summer is not counted as a stoppage.

The test finds accounts where usage stopped during the school year. The usual causes are a rollout that lost its internal owner, rosters that were not updated for the new year, or a competing product adopted at district level.

RECOMMENDED ACTION

Find out whether use stopped by decision or by oversight before any renewal conversation. The export does not tell the two apart, and they need different approaches.

ACCOUNTS CARRYING THIS SIGNAL

ACCOUNT	RENEWAL	SCORE	ARR
Dunmore Springs Unified School District	Aug 21, 2026	3.06	\$4,543
Juniper Unified School District	Nov 1, 2026	2.94	\$7,237
Westbrook Unified School District	Nov 14, 2026	3.38	\$16,926
Kestrel Independent School District	Dec 5, 2026	3.14	\$31,084
Yarrow Springs Community Schools	Feb 8, 2027	3.41	\$52,838
Quarry Public Schools	Feb 22, 2027	2.94	\$6,509
Cedar County Schools	Feb 28, 2027	3.06	\$100,980
Zephyr Area School District	Apr 28, 2027	3.09	\$2,400
Yarrow Public Schools	May 8, 2027	2.71	\$40,788
Granite Community Schools	May 20, 2027	2.94	\$11,504
Oakvale Community Schools	Jul 11, 2027	3.35	\$15,664

ACCOUNT	RENEWAL	SCORE	ARR
Northgate Point Public Schools	Aug 1, 2027	3.29	\$163,481
Total 12 accounts			\$453,954

Sorted by renewal date. Shaded rows renew within 90 days.

Concentrated usage

WHAT THE SIGNAL TESTS

Two schools account for 65 percent or more of all usage. Applied only to accounts with four or more schools.

The score reads well on these accounts because the schools using the product use it heavily, which leaves the rest of the contract unproven rather than failing. A district that can only show value in two of its schools has a reasonable basis for renewing at a seat count that covers two schools.

RECOMMENDED ACTION

Treat this as a rollout gap. Find the schools that never started, work out why, and get at least one of them running before the renewal date so the account has evidence from more than two sites.

ACCOUNTS CARRYING THIS SIGNAL

ACCOUNT	RENEWAL	SCORE	ARR
Northgate Independent School District	Mar 14, 2027	3.88	\$336,883
Ivyton County Schools	Mar 28, 2027	3.94	\$5,121
Yarrow Independent School District	Jun 30, 2027	4.00	\$95,737
Total 3 accounts			\$437,741

Sorted by renewal date. Shaded rows renew within 90 days.

Expansion signals

\$3,913,234 ARR SIGNALING GROWTH ACROSS 98 OF 248 ACCOUNTS

\$1,094,898 ARR ON 22 ACCOUNTS RENEWING WITHIN 90 DAYS

CONFIRM BEFORE MAKING AN OFFER

Expansion signals compare usage against the contract. They cannot see pilot terms, procurement cycles, other vendors or budget already committed, so each account needs confirming first.

LARGEST EXPANSION

Westbrook Area School District

\$216,690

customer health score 4.06 · renews in 356 days

Room to add product · heavy use of Keys, Foundations not on the contract

Accounts running on Tutor alone

WHAT THE SIGNAL TESTS

Sustained heavy use of Tutor on accounts holding neither Foundations nor Keys.

The book holds 11 accounts on Tutor alone, with neither Foundations nor Keys on the contract, so the expansion conversation on this group is also the retention conversation. Tutor is excluded from expansion recommendations because investment in it has stopped and churn on it runs higher.

RECOMMENDED ACTION

Start with the accounts using Tutor most heavily, since those districts have teachers who will notice when it stops improving. The aim is to get a supported platform running alongside it, so the relationship does not depend on a product the company is no longer building. Treat the account as done when it has activity on Foundations or Keys.

ACCOUNTS CARRYING THIS SIGNAL

ACCOUNT	RENEWAL	SCORE	ARR
Kestrel Area School District	Nov 13, 2026	3.90	\$17,706
Redstone Independent School District	Dec 13, 2026	3.71	\$24,082
Havenwood Independent School District	Jan 10, 2027	3.29	\$17,220
Tallgrass Ridge Independent School District	Jan 31, 2027	4.04	\$129,580
Glenmoor Heights Public Schools	Feb 22, 2027	4.35	\$61,465

ACCOUNT	RENEWAL	SCORE	ARR
Willowmere Unified School District	Apr 2, 2027	4.00	\$3,265
Fairhaven County Schools	Apr 15, 2027	4.18	\$8,961
Kingsley Area School District	Apr 29, 2027	3.82	\$18,816
Northgate Point Community Schools	May 19, 2027	3.80	\$59,280
Thornbury Unified School District	Jun 5, 2027	4.11	\$10,338
Clearwater Unified School District	Jun 10, 2027	4.04	\$11,688
Total 11 accounts			\$362,401

Sorted by renewal date. Shaded rows renew within 90 days.

Room to add product

WHAT THE SIGNAL TESTS

Sustained heavy use of a licensed platform while an adjacent platform is absent from the contract.

These accounts have already shown that the product works in their district, at their scale, so a proposal for a second platform starts from evidence rather than from an argument.

RECOMMENDED ACTION

Before the renewal call, look at which schools in the district are driving the usage that triggered this signal. Those schools are the case for the second platform, because the people using it there can speak to it inside the district. Bring their numbers to the renewal rather than a product overview, and ask the champion which schools should get the second platform first.

ACCOUNTS CARRYING THIS SIGNAL

ACCOUNT	RENEWAL	SCORE	ARR
Norwood Unified School District	Aug 9, 2026	4.17	\$19,487
Falls Springs Area School District	Aug 10, 2026	4.00	\$3,357
Zephyr Unified School District	Aug 18, 2026	4.02	\$163,680
Oakvale County Schools	Aug 19, 2026	3.93	\$2,400
Vale County Schools	Aug 21, 2026	4.12	\$4,907
Ashland Area School District	Aug 21, 2026	3.76	\$3,688
Lakemont Unified School District	Aug 23, 2026	3.81	\$69,440
Tallgrass Community Schools	Aug 28, 2026	3.35	\$5,970
Redstone Unified School District	Aug 30, 2026	4.41	\$146,300
Ivyton Area School District	Aug 31, 2026	3.94	\$32,256
Cedar Community Schools	Sep 2, 2026	3.57	\$17,062
Westbrook County Schools	Sep 5, 2026	3.82	\$10,152
Granite Point Area School District	Sep 6, 2026	4.38	\$165,220
Northgate Unified School District	Sep 14, 2026	4.12	\$173,800
Maple Community Schools	Sep 15, 2026	4.02	\$57,260

ACCOUNT	RENEWAL	SCORE	ARR
Granite County Schools	Sep 24, 2026	4.20	\$5,466
Iron Public Schools	Oct 15, 2026	4.01	\$170,500
Lakemont Community Schools	Oct 20, 2026	3.82	\$9,040
Verano Community Schools	Oct 28, 2026	3.53	\$3,694
Silverton County Schools	Nov 9, 2026	4.53	\$168,330
Redstone Public Schools	Nov 15, 2026	3.96	\$68,600
Ivyton Creek Public Schools	Dec 3, 2026	3.94	\$4,852
Juniper Community Schools	Dec 12, 2026	4.12	\$4,308
Tallgrass Independent School District	Dec 24, 2026	4.14	\$66,120
Larkfield Unified School District	Dec 24, 2026	3.59	\$36,408
Silverton Independent School District	Jan 1, 2027	3.23	\$37,212
Falls Point Unified School District	Jan 5, 2027	4.17	\$36,144
Yarrow County Schools	Jan 19, 2027	4.02	\$25,743
Brambleton Hollow Community Schools	Jan 24, 2027	4.12	\$2,400
Westbrook Independent School District	Jan 31, 2027	3.94	\$5,779
Verano Unified School District	Feb 5, 2027	4.00	\$192,720
Brambleton County Schools	Feb 5, 2027	3.94	\$5,733
Dunmore Community Schools	Feb 18, 2027	3.76	\$3,463
Stonebridge Public Schools	Feb 28, 2027	3.88	\$10,920
Maple Independent School District	Mar 22, 2027	3.76	\$4,412
Willowmere Community Schools	Mar 23, 2027	4.20	\$5,311
Vale Community Schools	Mar 29, 2027	4.38	\$68,875
Harlow Community Schools	Mar 30, 2027	4.12	\$2,400
Yarrow Point Unified School District	Apr 1, 2027	3.90	\$16,008
Kingsley County Schools	Apr 3, 2027	3.82	\$4,235
Clearwater Public Schools	Apr 4, 2027	4.23	\$61,320
Juniper County Schools	Apr 5, 2027	3.53	\$2,589
Fairhaven Community Schools	Apr 6, 2027	4.05	\$105,980
Northgate County Schools	Apr 6, 2027	3.80	\$2,400
Underhill Public Schools	Apr 14, 2027	3.71	\$33,468
Iron Independent School District	Apr 21, 2027	4.12	\$7,203
Tallgrass Public Schools	Apr 28, 2027	3.19	\$5,751
Redstone Community Schools	May 2, 2027	4.35	\$189,639
Lakemont Public Schools	May 11, 2027	3.98	\$99,540
Rockhaven Public Schools	May 13, 2027	4.12	\$77,420
Lakemont Springs Unified School District	May 15, 2027	4.14	\$14,580

ACCOUNT	RENEWAL	SCORE	ARR
Harlow Unified School District	May 17, 2027	3.03	\$3,424
Pemberton County Schools	May 27, 2027	3.53	\$2,400
Pemberton Community Schools	Jun 3, 2027	3.94	\$4,055
Iron Community Schools	Jun 5, 2027	4.53	\$6,434
Vale Creek Area School District	Jun 7, 2027	4.23	\$2,400
Falls Springs County Schools	Jun 11, 2027	4.00	\$184,139
Willowmere Valley Unified School District	Jun 11, 2027	3.65	\$35,815
Stonebridge County Schools	Jun 18, 2027	3.80	\$7,587
Westbrook Community Schools	Jun 25, 2027	4.08	\$2,850
Havenwood Public Schools	Jul 22, 2027	4.22	\$33,672
Elmridge Unified School District	Jul 22, 2027	4.12	\$2,400
Silverton Community Schools	Jul 26, 2027	3.51	\$20,220
Dunmore Independent School District	Jul 28, 2027	4.50	\$11,527
Westbrook Area School District	Jul 29, 2027	4.06	\$216,690
Redstone Area School District	Jul 29, 2027	3.86	\$10,874
Stonebridge Unified School District	Aug 3, 2027	4.43	\$189,860
Underhill Point Community Schools	Aug 5, 2027	4.27	\$39,235
Ivyton Grove Unified School District	date has passed	3.35	\$22,830
Total 69 accounts			\$3,229,954

Sorted by renewal date. Shaded rows renew within 90 days. The other 10 accounts carrying this signal run on Tutor alone and are listed in the preceding section.

At seat capacity

WHAT THE SIGNAL TESTS

Eighty-five percent or more of contracted licenses assigned to a person, whether or not that person is active.

An account at capacity has no licenses left to assign, so any additional user requires a change to the contract.

RECOMMENDED ACTION

Ask each district which schools or staff have asked for access and not received it. Once an account is full, those requests stop being recorded anywhere the account team can see, so usage on these accounts measures the size of the contract rather than the demand behind it. The people who were turned away are the case for the larger seat count, and they give the district a specific reason to approve it.

ACCOUNTS CARRYING THIS SIGNAL

ACCOUNT	RENEWAL	SCORE	ARR
Rockhaven Ridge County Schools	Sep 9, 2026	4.24	\$3,331
Ashland Unified School District	Nov 11, 2026	4.45	\$2,400

ACCOUNT	RENEWAL	SCORE	ARR
Vale Independent School District	Nov 22, 2026	3.71	\$30,120
Thornbury County Schools	Dec 22, 2026	4.53	\$12,422
Pinehurst County Schools	Dec 27, 2026	4.23	\$12,099
Brambleton Area School District	Mar 28, 2027	3.86	\$4,070
Quarry Community Schools	Jun 9, 2027	4.12	\$47,436
Juniper Public Schools	Jul 1, 2027	4.47	\$50,749
Total 8 accounts			\$162,627

Sorted by renewal date. Shaded rows renew within 90 days.

Room to add product with seat capacity

WHAT THE SIGNAL TESTS

Both tests met on the same account.

The seat constraint applies to the platform the account already licenses, and the product gap applies to the one it does not. Both can be raised in the same conversation.

RECOMMENDED ACTION

Lead with the seat constraint, since it is the district's problem rather than a vendor proposal, and it opens the question of who is waiting for access. The answer usually identifies schools not yet running the product at all, which is the case for the second platform in the same conversation.

ACCOUNTS CARRYING THIS SIGNAL

ACCOUNT	RENEWAL	SCORE	ARR
Lakemont Springs Independent School District	Oct 2, 2026	4.29	\$8,076
Clearwater Area School District	Oct 24, 2026	4.22	\$19,812
Iron County Schools	Nov 20, 2026	4.45	\$17,865
Glenmoor County Schools	Jan 29, 2027	4.47	\$14,233
Harlow County Schools	Feb 6, 2027	4.29	\$35,688
Yarrow Community Schools	Feb 22, 2027	3.79	\$9,102
Quarry Unified School District	May 1, 2027	3.47	\$10,098
Underhill Area School District	Jun 19, 2027	4.32	\$7,342
Pemberton Unified School District	Jul 12, 2027	4.06	\$8,652
Falls Area School District	Aug 6, 2027	4.41	\$27,384
Total 10 accounts			\$158,252

Sorted by renewal date. Shaded rows renew within 90 days. The other 1 account carrying this signal runs on Tutor alone and is listed in the preceding section.

Accounts removed from the expansion list

An expansion signal was recorded on **104 accounts holding \$4,097,898**. 6 of those also carry a churn signal and are removed from the expansion list rather than appearing on both. A second platform is difficult to place on an account where the champion has gone quiet or invoices are outstanding, so these accounts are reported once, under churn, and the expansion discussion follows once the churn signal is resolved.

Flags

A flag records a condition that does not indicate a problem on its own and gives context to any signal it appears alongside. Flags are reported separately and are not included in the churn or expansion totals.

Single contact

\$1,916,266

ARR ON ACCOUNTS WITH ONE CONTACT ON RECORD

29

OF 248 SCORED ACCOUNTS

WHAT THE FLAG TESTS

One contact or fewer on record for the account.

A single contact is normal on smaller accounts. It matters where it appears alongside a churn signal, because one contact who stops responding leaves no route into the account.

RECOMMENDED ACTION

Add the second contact during the outreach that each account's churn signal already calls for. Ask for two people by role: whoever manages the product day to day at the district, usually in curriculum or instructional technology, and whoever handles purchasing for the renewal. District staff directories are public, so both can be identified before the conversation begins. Work the accounts largest first. A second contact counts once that person has replied at least once.

ACCOUNTS CARRYING THIS FLAG ALONGSIDE A CHURN SIGNAL

ACCOUNT	CHURN SIGNAL	RENEWAL	SCORE	ARR
Granite Valley Area School District	Champion gone quiet	Aug 22, 2026	3.71	\$204,547
Underhill Unified School District	Champion gone quiet	Dec 10, 2026	3.77	\$34,099
Quarry Public Schools	No usage during school year	Feb 22, 2027	2.94	\$6,509
Northgate Public Schools	Champion gone quiet	Jun 3, 2027	4.08	\$22,609
Northgate Point Public Schools	No usage during school year	Aug 1, 2027	3.29	\$163,481
Total 5 accounts				\$431,245

Sorted by renewal date. Shaded rows renew within 90 days.

Recommended sequence

Ordered by how soon the available window closes rather than by ARR. Accounts with a renewal date are placed first, since that date cannot be extended.

- 1 **The 7 accounts renewing within 90 days with a churn signal.** Marked in each churn table above.
- 2 **Champion gone quiet with payment behavior.** Contact runs through accounts payable, which routes to whoever now owns the account internally.
- 3 **The remaining accounts where the champion has gone quiet.** Worked largest first. The action for this group starts with a report to the district on its most active schools.
- 4 **The 22 expansion accounts renewing within 90 days.** The same deadline applies as in item one.
- 5 **No usage during school year, and concentrated usage.** Both need a cause established before a commercial conversation begins.
- 6 **Accounts running on Tutor alone.** No renewal date drives this group, so it is scheduled around the dated items above.
- 7 **The remaining expansion accounts.** No renewal deadline applies, so this is worked continuously and suits the first body of ongoing work.

The supporting account data for every signal in this report is held in a separate workbook, **Health Check Account Appendix**, included with this packet. It contains three tabs: expansion at 104 accounts including the 6 removed and marked accordingly, churn at 38 accounts, each with the evidence recorded against the signal, and Not scored at 12 accounts, each with the contract field missing on it.