

# You're growing — you just can't see it yet.

## THE READ

Bob feels the Pro package isn't working. The data says otherwise — this is an adoption & visibility gap, not a product failure.

## WHAT THE DATA SHOWS

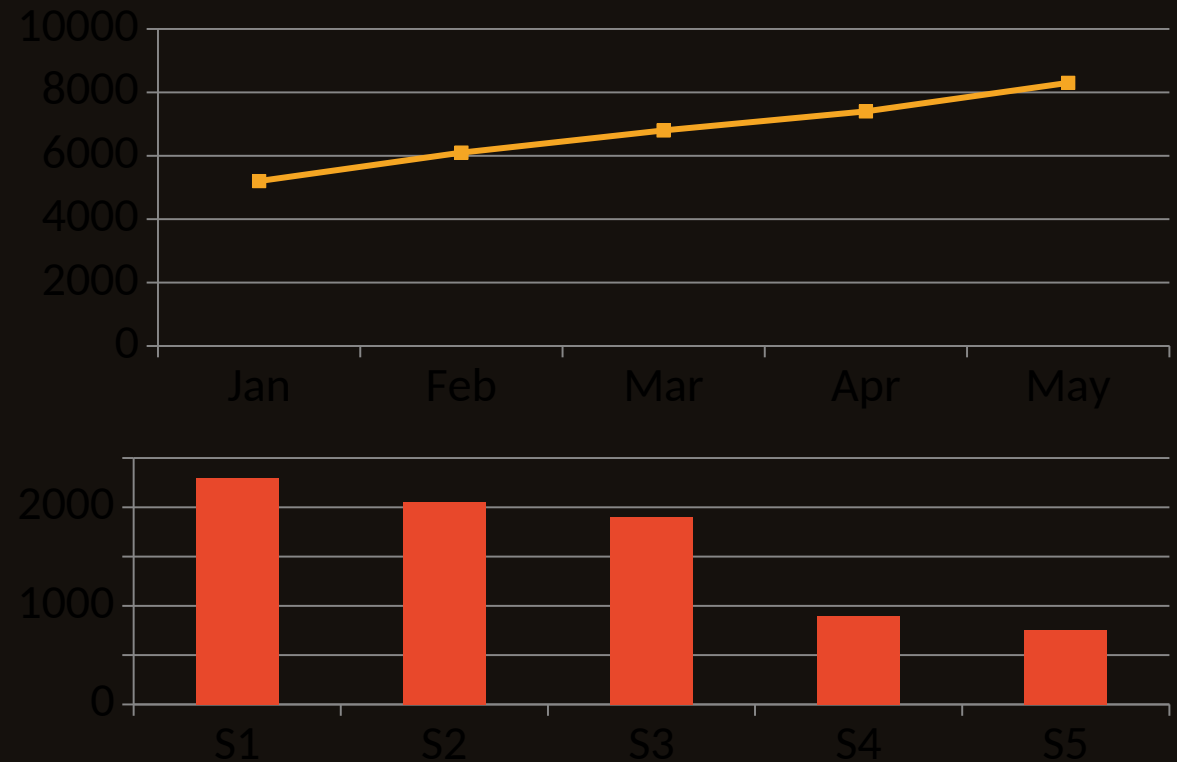
*[Online sales up X% since January]*

*[Owned-channel orders avoided ~\$Y in marketplace commission]*

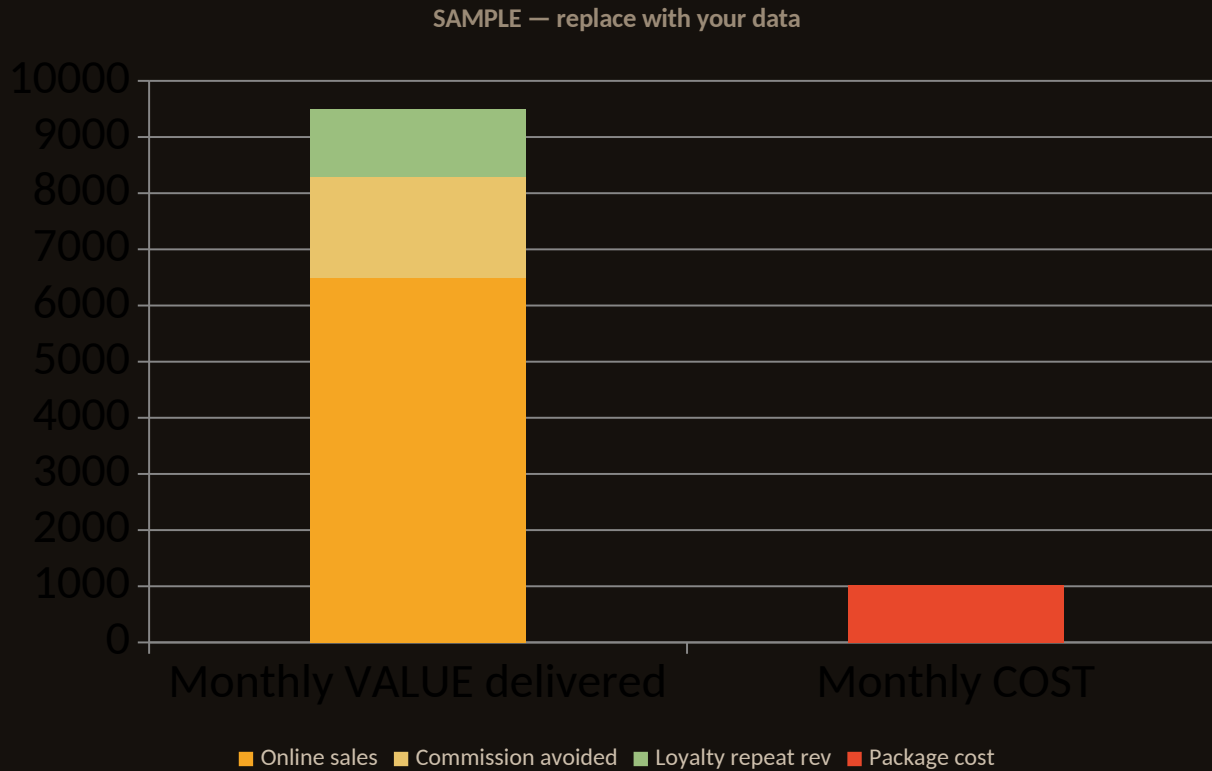
*[Loyalty list grown to Z owned customers]*

*[Stores 1-3 thriving; Stores 4-5 dormant — executional, not product]*

SAMPLE — replace with your data



# The math already works.



**\$1,025 / mo**

total package cost — 5 stores × \$205

[ ≈ X× return on every \$1 spent ]

### THE ASSETS HE'D FORFEIT

#### Owned customer list & data

leaves with the old provider — gone

#### Branded website & custom app

first-party channel, no marketplace fee

#### Loyalty momentum

repeat-visit engine he's already built

# The 90-day plan to make it undeniable.

**DAYS 0–30**

## ACTIVATE

Audit unused Pro features. Build 2–3 CRM campaigns, switch on loyalty pushes, promote the custom app.

**DAYS 30–60**

## PROVE

Stand up a simple ROI dashboard so Bob SEES results weekly. Biweekly check-ins.

**DAYS 60–90**

## SCALE

Lift laggard stores to the leaders' playbook. Hit the targets you both signed.

**DAY 90**

## DECIDE

QBR with the before/after. Value is now visible — renew & expand, not downgrade.

**THE SINGLE MOST IMPORTANT NEXT ACTION**

Book & run a data-driven “Value & Growth” working session within 72 hours.

**OWNER**

**Harshleen Kaur (CSM)**

pulls in Enablement to activate features

# The exact email I'd send Bob.

**Subject: Re: Your Online Ordering Pro Package — let's make sure it's working for you**

Hi Bob,

Thank you for the honest note — I'd much rather you tell me where things stand than walk away quietly. You moved to us in January to grow Bob's Burgers, and if you're not feeling that growth, helping fix it is exactly my job.

Before we talk about any change to your contract, I want to earn that conversation by showing you what your own numbers tell me. Across all five locations, a few things stood out: [1-2 specific findings from your data]. I also see real, unused horsepower in your plan — [the CRM email & loyalty tools you're already paying for are barely switched on] — and that's usually the difference between "fine" and "results."

Here's what I'd like to do: a 30-minute working session this week where we (1) review your performance together, (2) turn on the Pro features driving the most revenue for merchants like you, and (3) set a 90-day plan with targets we both sign off on.

Are you open to [Tuesday or Thursday] this week? I'll bring your data and a plan — you just bring your goals.

**Talk soon, Harshleen Kaur · CSM, Online Ordering**

# My 100 merchants aren't equal — they're a portfolio.

## TOP 3 INSIGHTS (lead each with the number, not the adjective)

### 01 Concentration of value

"My top [N] merchants drive [X]% of revenue."  
→ they get named, scheduled, protected.

### 02 Adoption predicts retention

"Low-adoption accounts show [the churn signals]."  
→ proactive activation before they email like Bob.

### 03 A timing cluster

"[N] accounts renew next quarter / are newly live & unactivated."  
→ a focused, calendar-driven motion.

#### PROTECT

High value  
High risk

#### GROW

High value  
Healthy

#### TRIAGE

Low value  
High risk

#### AUTOMATE

Low value  
Healthy

Value ↑ · Risk → · Bob's Burgers = Protect

# How I'd spend my week because of it.

## PROTECT

High-value, at-risk

White-glove saves. Proactive QBRs. Bob lives here — the highest-leverage hours on my calendar.

~40% of time

## GROW

High-value, healthy

Expansion, references, multi-year renewals. Turn success into advocacy and upsell.

~30% of time

## SCALE

The long tail

Tech-touch & automated playbooks. Right-size effort to value; catch the ones quietly becoming Grow.

~30% of time

*My book isn't 100 equal accounts — it's a portfolio. I invest where value AND risk are high, automate the rest, and never just process a downgrade for a Protect account like Bob.*