SaaS Renewal Conversations for Customer Success Managers

Public workshop · Live online

Thursday 12 November 2026 · 09:30–14:30 GMT · 4 training hours

NEWSKILZ GLOBAL CONSULTING



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Workshop focus

- Open a renewal review
- Test evidence of value
- Explore a customer concern
- Agree the next renewal step

Customer Success

Practical people skills for tech teams

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Workshop overview

Rehearse a renewal conversation for your own product. Ask what will shape the customer's decision, test your evidence of value and respond when the customer raises a concern.

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Workshop practice

In a group of up to four, you take turns practising situations agreed during your training needs analysis. A peer or your facilitator gives you feedback on what they saw and heard. You try the difficult part again.

Preparation and follow-up

Before the workshop

For a manager-sponsored place, we first ask your manager what they want the training to help you do. In a short, private training needs analysis (TNA), you tell us about your product or solution, the people you work with and a conversation or task you want to handle better. You and your facilitator agree what the group can use for practice.

Allow 15–20 minutes to prepare a renewal opening, one shareable piece of evidence and a concern you hear from customers of your product.

Bring · The agreed renewal brief. A description of an account pattern is enough; keep customer records and contract terms private.

After the workshop

Revise your review opening and action plan. Pick two behaviours to use at your next account review and agree a time to check how they worked.

Your individual report separates feedback on the written opening and plan from listening, acknowledgement and ownership observed in live practice. It includes 2 workplace priorities and a review prompt.

Workshop agenda

09:30–10:00	**Start the renewal conversation** Open a renewal review with a peer playing your customer. Ask what will influence the decision to renew, then follow up on the first answer. **Feedback** · Your customer describes what made it easy or difficult to answer candidly. Rephrase your opening and try again.
10:00–10:45	**Test one piece of value evidence** Choose one result or observation you can share about your product. Explain it in two sentences and ask what it meant in the customer's work. **Feedback** · An observer identifies what your evidence supported and any conclusion the customer still needed to confirm.
10:45–11:30	**Get underneath a renewal concern** Invite your customer to raise the concern in your brief. Ask for a recent example, listen to its effect and check that your summary captures what matters to them. **Feedback** · Your customer corrects the summary. The observer points to the follow-up that helped uncover the concern.
11:30–12:30	**Lunch break** Optional 10-minute 1-to-1 video check-in with your facilitator to review feedback and focus your afternoon practice.
12:30–13:15	**Respond when the customer challenges value** Lead a review exchange from your own brief. Acknowledge the concern, answer with evidence you can stand behind and agree what else needs checking. **Feedback** · Your customer names the part that addressed their concern. The observer flags any unsupported claim or unowned follow-up.
13:15–14:00	**Replay the point where the review stalled** Try the difficult exchange a second time. Change your response using the feedback, then ask who else needs to be involved before the renewal decision. **Feedback** · Peers compare your two responses and identify which one elicited a clearer account of the customer's decision.
14:00–14:30	**Close with a next review the customer will use** Summarise what the customer needs to decide, what each side will do and when you will review the evidence together. Invite them to amend the plan. **Feedback** · Your customer repeats their own next action. A peer checks that your recap includes an owner and a review point.

Free workshop resources

Before your renewal call, use the checklist to gather evidence of value and identify concerns to discuss with the customer.

SaaS Renewal Conversations checklist

SaaS Renewal e-learning

Browse all checklists