

Customer data and signals: The four categories that matter most

Financial Data

→ What to track

- Payment timing and patterns
- Invoice amounts and frequency
- Payment methods and changes
- Billing disputes or queries

→ Key signals

- Payment delays beyond normal patterns
- Requests to change payment terms
- Disputes over previously accepted charges
- Downgrades in service levels

Usage Data

→ What to track

- Login frequency and duration
- Feature usage depth and breadth
- User growth within accounts
- Peak usage times and patterns

→ Key signals

- Significant increases or decreases in activity
- New feature adoption or abandonment
- Changes in user count or engagement levels
- Shifts in usage timing or patterns

Communication Data

→ What to track

- Response times to emails and calls
- Meeting attendance and participation
- Quality of interactions (engaged vs. distracted)
- Who participates from their organization

→ Key signals

- Response times getting longer
- Senior people being replaced by junior staff
- Meetings being cancelled or rescheduled frequently
- Communication becoming more formal or distant

Organizational Data

→ What to track

- Leadership changes
- Company announcements (funding, acquisitions, layoffs)
- Industry pressures or opportunities
- Technology stack changes

→ Key signals

- New decision makers arriving
- Budget constraints or expansions
- Strategic shifts affecting your solution
- Competitive pressures in their market