

Post-Close Revenue Protection Framework for Manufacturers

Winning an account takes 12-18 months of marketing, nurturing, and relationship building. Yet many manufacturers treat closed-won as the finish line.

This framework shows how marketing supports customer growth between close and renewal by helping protect revenue, strengthen the account, and surface future sales opportunities.

Marketing is not the sole owner of retention or expansion, but it should play an active role alongside sales, service, and leadership.

1
MONTH
1

Welcome & Confidence

GOAL: REASSURE THE CUSTOMER THEY MADE THE RIGHT DECISION

- Sales notifies marketing immediately at close -- post-close sequence kicks off
- Welcome email series introducing the company, team, and relationship
- Clear contact card: sales, customer service, and technical support at a glance
- Customer portal setup resources and training if applicable
- Welcome gift or personal note that signals this is a relationship, not just a transaction

Triggered by: Signed PO or contract close

Marketing supports: Welcome email sequence, contact card, portal resources, welcome gift coordination

Sales / account owner leads: Relationship handoff and personal outreach to new contacts

2
MONTH
2-3

Activation

GOAL: ACCELERATE TIME-TO-VALUE AND BUILD EARLY MOMENTUM

- Education around adjacent capabilities customers may not be using yet
- FAQs addressing common friction points before they become problems
- First CX survey -- 1 to 2 questions on onboarding experience
- Monitor engagement signals and flag concerns to sales proactively

Triggered by: Kickoff completed

Marketing supports: Educational content, FAQ resources, first CX survey

Sales / account owner leads: Kickoff, check-ins, and acting on early warning signals

3
MONTH
3-6

Protection

GOAL: KEEP THE ACCOUNT HEALTHY AND REDUCE CHURN RISK

- Second CX survey to assess satisfaction and catch issues early
- Continued content touchpoints keeping your brand visible and relevant
- Track contact changes and trigger outreach when new stakeholders enter the account
- Account review trigger: if a key contact changes, marketing and sales align on intro plan
- Begin pre-renewal marketing cadence 6 months before contract end

Triggered by: First delivery completed

Marketing supports: Second CX survey, ongoing content touchpoints, contact change monitoring

Sales / account owner leads: Executive relationship, renewal conversation, new stakeholder introductions

4
MONTH
6-12

Expansion

GOAL: UNCOVER REVENUE GROWTH OPPORTUNITIES INSIDE THE RELATIONSHIP

- Monitor growth signals: new facilities, leadership hires, product line expansion, increased order frequency
- Education around adjacent capabilities tied to specific use cases
- Capture customer results, application stories, and operational wins for case studies
- Sales alerts when expansion signals appear -- marketing surfaces the opportunity, sales acts on it

Triggered by: Repeat order, utilization milestone, or contract midpoint
Marketing supports: Growth signal monitoring, capability content, case study capture, sales alerts
Sales / account owner leads: Expansion conversations and new department relationships

5
MONTH
6-12+

Advocacy

GOAL: TURN CUSTOMER SUCCESS INTO PROOF THAT HELPS SELL

- Testimonial or quote request -- anonymous if preferred
- Case study using their results -- anonymous if preferred
- In-depth CX phone interview -- 30 minutes, structured questions that surface satisfaction, risks, and expansion opportunities

Triggered by: Measurable customer win or successful project completion
Marketing supports: Testimonial and case study requests, CX phone interview
Sales / account owner leads: Relationship context and timing the ask

What to Measure Post-Close

<p>LEADING</p> <p>Onboarding email engagement</p> <p>Are new customers opening and clicking post-close content</p>	<p>LEADING</p> <p>Portal activation rate</p> <p>Percentage of new customers actively using the customer portal</p>	<p>LAGGING</p> <p>Customer lifetime value</p> <p>Track revenue per account over time, not just at close</p>	<p>LAGGING</p> <p>Renewal rate</p> <p>Percentage of accounts that renew without going back to RFP</p>	<p>LAGGING</p> <p>CX score trend</p> <p>Are satisfaction scores improving, holding, or declining</p>
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Business Outcomes This Framework Supports

- Faster customer ramp-up
- Stronger retention
- Increased repeat purchase rate
- Higher account expansion revenue
- More referrals and customer proof for future sales
- Reduced RFP risk at renewal

Customer growth is a go-to-market responsibility, not a single-team handoff.