

Evidence Locker / Changing priorities

Engagement Drift Check

Investigate quieter engagement without assuming that silence means dissatisfaction.

When to use it

Use when meetings, workflow usage, or stakeholder participation change without a clear explanation.

Work the questions in order

1. Compare the observation with the customer's usual pattern and check measurement quality.
2. Ask what changed in the customer's priorities, team, or workflow.
3. Confirm a relevant outcome and a small next step, or acknowledge that the old use case no longer fits.

Fictional worked example

A project ends and product activity declines. The CSM checks whether a new priority needs the product rather than treating the completed project as a failed adoption effort.

A note on judgment

Do not escalate or increase contact simply to improve an engagement metric. Match the response to a customer need.

Open the related case

The Slow Fade

Newly created educational template, not a former-employer document or a validated scoring model. Adapt it to your context. Keep confidential information out of shared copies.

Your working notes

Engagement Drift Check / Part 1 of 2

Context or anonymized account: _____

Date: _____ Review date: _____

01 Change observed

What is different from the account's normal pattern?

02 Benign explanations

Could seasonality, automation, staff changes, or incomplete tracking explain it?

03 Customer perspective

What does the customer say changed? When did you last confirm their priorities?

04 Current outcome

Is the existing success-plan outcome still relevant? What has replaced it?

From clues to action

Engagement Drift Check / Part 2 of 2

05 Next useful step

What would the customer actually want to try or resolve?

06 Owner and evidence

Who will act, and what will show whether it helped?

07 Review decision

When will you continue, revise, or stop the proposed approach?

Before you close the file

Check what is known, what is assumed, and what still needs confirmation. Agree on the next action and the review point. A completed worksheet is not a solved case.