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## Board-Ready Customer Intelligence Brief

### What boards actually need to know about customers and why

This brief outlines how customer data should be structured, interpreted, and presented at the board level to support confident decisions around growth, investment, and risk.

Its purpose is not reporting. Its purpose is governance.

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### The Core Problem

Most boards are shown a lot of customer data—and still leave with unanswered questions.

They see:

- Retention rates without context
- NPS scores without explanation
- Pipelines without confidence
- Dashboards without decisions

What they don't see clearly enough is:

- Where risk actually lives
- Why performance is changing
- Whether growth is durable
- What leadership should do next

Board-ready customer intelligence solves that gap.

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## The Principle

**Boards don't need more metrics. They need fewer metrics they can trust.**

Customer intelligence at the board level should:

- Explain outcomes, not just describe them
  - Surface risk early, not after the fact
  - Tie customer behavior to revenue and valuation
  - Enable choices, not debates
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## What “Board-Ready” Actually Means

Customer intelligence is board-ready when it meets four standards:

1. **Predictive** – shows what will happen, not just what did
2. **Explainable** – leadership can defend it under scrutiny
3. **Actionable** – it leads to clear decisions
4. **Consistent** – the same story holds quarter to quarter

If it fails any of these, it erodes confidence.

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## The Executive Customer Scorecard

**The only metrics boards actually need**

I anchor board-level customer discussions around a small, stable set of measures:

### Revenue Durability

- Net Revenue Retention (NRR)
- Gross Revenue Retention (GRR)

### Predictability

- Renewal Forecast Accuracy
- Renewal Coverage Ratio

### Value Realization

- Time to Value
- Adoption Velocity

## Efficiency & Leverage

- Cost-to-Serve by Segment
- Professional Services Margin & Utilization

## Risk Visibility

- Risk Detection Lead Time
- Founder / Exec Escalation Frequency

These metrics are chosen because they answer board-level questions. Not operational ones.

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## How Boards Should Interpret the Data

Metrics do not stand alone. They tell a story in combination.

Examples:

- **Stable GRR + improving Time to Value** → durable retention
- **High NRR + declining PS margin** → growth masking leverage risk
- **Strong forecast accuracy + early risk detection** → governed execution
- **Rising escalations + flat churn** → future risk not yet priced in

The goal is not to defend numbers. It is to understand cause and consequence.

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## How This Informs Board Decisions

When customer intelligence is structured correctly, boards can:

- Approve hiring plans with confidence
- Sanction investment in Product or Services based on evidence
- Understand expansion quality—not just quantity
- Assess execution risk before it shows up in revenue
- Tie customer health directly to valuation narratives

Customer data becomes an asset in the boardroom. Not a liability.

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## Common Board Traps (and How to Avoid Them)

**Trap:** Over-rotating on NPS

**Correction:** Pair sentiment with behavior and outcomes

**Trap:** Treating churn as a lagging KPI

**Correction:** Inspect risk lead time and value realization

**Trap:** Adding metrics every quarter

**Correction:** Hold the scorecard stable; refine interpretation

**Trap:** Optimism bias in forecasts

**Correction:** Anchor forecasts to governed renewal motion

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## The CEO's Role

The CEO's credibility with the board is shaped by:

- Whether customer performance is explainable
- Whether forecasts hold
- Whether risks are surfaced early—not excused later

Board-ready customer intelligence protects that credibility.

It allows the CEO to say:

“Here’s what’s happening. Here’s why. And here’s what we’re doing about it.”

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## The Outcome

When this model is in place:

- Board conversations shift from anxiety to choice
- Customer performance supports valuation and diligence
- Leadership decisions accelerate instead of stall
- Customer data earns trust

Post-sale becomes a strategic advantage, not a reporting obligation.

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## Final Thought

Boards don't need to be customer experts. They need confidence that someone is governing the system.

This is how I ensure customer intelligence holds up—under growth, scrutiny, and pressure.