GTS MEDOH · OPERATIONS

Renewal Intelligence Operations Guide

How the renewal pipeline works, what the figures mean and how to turn renewal intelligence into booked revenue.

FOR

Operations staff · Account managers · Platform administrators

GTS MedOH · May 2026

Why Renewal Revenue Matters

For most occupational health training providers, renewal revenue — income from existing customers rebooking as their certifications expire — is more predictable and more profitable than new customer acquisition. The renewal pipeline tells you how much of this revenue is available, how much is at risk and what action will capture it.

How the Pipeline Is Built

The renewal pipeline is calculated automatically from compliance records. For every certificate that is current, expiring or lapsed within a 180-day window, the system estimates the renewal value using the course price for that compliance type.

If no course price exists for a compliance type, the system uses the organisation's average booking value as a fallback. This means the pipeline is always an estimate — but a useful one.

> ℹ The pipeline is only as good as the data behind it. Organisations with compliance records managed in the platform and courses correctly priced will have accurate pipeline figures. New organisations or organisations with incomplete data will have estimates.

The Five Key Figures

FIGURE	WHAT IT MEANS	WHEN TO BE CONCERNED
Total Pipeline	Total forecast renewal revenue from all expiring certificates in the selected window	If declining month-on-month, fewer certifications are being renewed through GTS MedOH
Already Booked	Renewals that have a confirmed booking in place	If low relative to total pipeline, most renewals are unsecured
At Risk (unbooked)	Renewal value with no confirmed booking — could be lost	High at-risk value with expiry approaching is a commercial priority
Revenue Leakage	At-risk value as a percentage of total pipeline	Above 40% is critical — significant revenue at risk of not converting
Orgs Affected	Number of organisations with expiring certifications in the window	Informs how many outreach conversations are needed

Renewal Probability Scores — What They Tell You

Each organisation receives a renewal probability score (0–100) based on three factors:

- **Historical rebook rate (50%)** — did they rebook after previous expirations?
- **Booking recency (30%)** — how recently did they last book with GTS MedOH?
- **Volume (20%)** — how many certifications are expiring?

RISK TIER	WHAT IT MEANS	RECOMMENDED ACTION
Likely to Renew	Strong historical renewal rate — high probability they will rebook	Send renewal reminder. Normal outreach cadence.
Monitor	Average probability — no major red flags but no strong signal either	Add to outreach list. One proactive contact recommended.
Medium Risk	No booking in 180+ days — engagement declining	Personal outreach from account manager. Understand why they haven't booked.
High Risk	High renewal value, no booking in 365+ days	Urgent outreach. Identify if they are using another provider.

The At-Risk Customers Table

The At-Risk table surfaces organisations that have expiring certifications but haven't booked a renewal and haven't been active recently. These are the accounts most likely to be lost to another provider or simply to lapse without renewal.

Colour-coded priority indicators tell you how urgently to act:

- 🔴 **Urgent** — £1,000+ at risk, inactive for 180+ days. Call this week.
- 🟠 **High value — contact soon** — £500+ pipeline, some inactivity. Call this month.
- 🟡 **Monitor** — renewal approaching, risk manageable. Automated reminder may be sufficient.

Using AI Recommended Actions

Click **AI Actions** on the Renewals tab to generate a prioritised set of account manager recommendations based on the current pipeline data. The AI analyses the at-risk customers, renewal probability scores and leakage figures and produces specific actions with context.

> EXAMPLE AI OUTPUT
>
> "Balfour Beatty has £4,200 in HAVS Surveillance renewals due in the next 45 days and has not booked in 210 days. Historical rebook rate is 62%. Recommend a personal call from the account manager this week to confirm renewal plans. Next available HAVS session is 12 June with 4 places remaining."

From Intelligence to Action

The renewal dashboard tells you what the opportunity is. Converting that opportunity into revenue requires the following workflow:

1. **Review the At-Risk table weekly**

   Sort by at-risk value. Focus on the top 10 accounts.

2. **Run AI Recommended Actions**

   Get specific, data-driven talking points for each at-risk account.

3. **Make contact**

   Phone is more effective than email for high-value accounts. Reference the specific certifications expiring and suggest available dates.

4. **Book the renewal**

   If the customer confirms, book immediately. The account moves from At Risk to Already Booked on the dashboard.

5. **Review leakage weekly**

   Monitor revenue leakage as a KPI. A declining leakage percentage means more of the pipeline is converting.