ROLE BRIEF, ILLUSTRATIVE

Sam, Customer Commitments and Renewals

Illustrative role. Names, examples and systems show how it could work, not customer results.

Reports to	Works with	Business outcome
Head of Customer Success or Account Management	Account managers, finance, legal or contract operations, support, and Alex in Revenue Operations	No renewal date, notice period or customer commitment is found late.

Job description

Sam owns the follow-through on what your company has agreed to. It keeps a register of commitments from signed contracts and meetings, gives owners early notice of renewals and deadlines, prepares renewal packs, and chases promised actions until they are closed or escalated. It summarizes contract terms for people. It does not interpret or change them.

Responsibilities

- Maintains a register of key dates and commitments from signed contracts: renewal dates, notice periods, deliverables and service levels.
- Gives owners notice of upcoming renewals and deadlines at the agreed lead times.
- Prepares renewal packs: contract summary, usage, open support issues and account history.
- Checks that order forms and signatures are present and match the records.
- Tracks actions promised to customers in meetings and follows them until closed.
- Flags accounts showing risk signals near renewal, such as open escalations or falling usage.

Sample KRAs

KRA	Definition	How it is counted
Register completeness	Contracts in scope have their key dates and commitments captured and checked against the signed document	Contracts complete and checked, divided by contracts in scope
Notice timeliness	Owners are notified of renewals and deadlines at the agreed lead time	Notices sent on time, divided by notices due
Renewal pack readiness	Packs are ready before the agreed review date and accepted without major rework	Packs accepted on time, divided by packs due
Commitment closure	Promised actions are closed or escalated by their due date	Actions closed or escalated on time, divided by actions due
Escalation quality	Escalations reach the right person with the context to decide	Escalations accepted as complete, divided by escalations raised

Targets are agreed with you during role design and reviewed against real results. None are implied here.

How the role works day to day

An ordinary day

Time	What happens
08:45	Checks the register and sends owners notice of two renewals entering their notice window.
09:20	Finds a renewal missing its signed order form and asks the account manager for it.
11:00	Prepares a renewal pack with the contract summary, usage trend and open support issues.
13:20	Spots a deliverable promised in last week's meeting with no owner and asks the account manager to assign one.
14:35	The account manager replies with the renewal contact. Sam updates the record and books the next step.
17:30	Closes the day: checks updated records against the CRM and contract repository, and lists open items.

When something is not ordinary

- A contract has an unusual auto-renewal clause. Sam summarizes it, quotes the clause, and sends it to contract operations for interpretation.
- A customer asks to change their renewal terms. Sam routes the request to the account manager and does not reply on terms.
- The contract repository connector fails. The register check fails, affected items are marked blocked, and the issue is raised for Ampity to fix.
- Two documents show different renewal dates. Sam asks contract operations which is authoritative.

Automatic and escalated work

Does automatically	Brings to a named person	Never does
• Maintain the commitment register • Send internal renewal and deadline notices • Prepare renewal packs • Update renewal records	• Any message to a customer about terms • Unclear or unusual contract clauses • Accounts with risk signals near renewal	• Change pricing or contract terms • Send contractual notices on its own • Give legal interpretation

Possible configured integrations

CRM; contract repository or document storage such as SharePoint or Google Drive; billing or subscription system; support desk; e-signature tool; email and calendar. Each integration is built and tested only where agreed, and only with the access the role needs.

Next step

Bring the customer commitments and renewals responsibilities you want covered to a role design session. We draft the charter, KRAs, authority and a cost model with you.

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