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COURSE BROCHURE

# Recurring Revenue Analysis and Cohort Retention Training Course

5 – 9 July 2027
Rome

# Recurring Revenue Analysis and Cohort Retention Training Course

**Ref:** 2813_107853 **Date:** 5 – 9 July 2027 **Location:** Rome **Fees:** 6200 GBP

Recurring Revenue Analysis and Cohort Retention is a 1-week training course for commercial finance analysts, FP&A teams and sales operations managers, producing a Recurring Revenue Bridge and Cohort Retention Model. Subscription and contract businesses now rise or fall on how much revenue each customer group keeps or loses each month. Jupiter Prime Training delivers this course for analysts who explain revenue movement rather than simply report it.

## Why Recurring Revenue Analysis and Cohort Retention Matters Now

Three pressures shape this work. Investors and lenders judge subscription and contract businesses on retention and expansion, not on headline bookings. Sales, customer success and finance each hold part of the customer record, so one reconciled view of opening, new, expansion, contraction and churned revenue is rare. An organisation that measures cohort behaviour sees early warning in renewal rates; one that does not is surprised when growth stalls. The course rests on revenue bridge logic, cohort tables and standard retention ratios.

## Who Gains Most from Recurring Revenue Analysis and Cohort Retention

- Analysts who prepare the monthly revenue movement pack for leadership
- FP&A staff who turn renewal and churn assumptions into the revenue outlook
- Sales operations staff who own booking, renewal and contract data
- Customer success analysts who track account health and expansion

A commercial team that sends its finance, sales operations and customer success analysts together gains most, because each learns to read the same bridge.

## Recurring Revenue Analysis and Cohort Retention Capabilities

Participants leave able to split recurring revenue movement into customer causes and project it from cohorts.

- Build an opening-to-closing revenue bridge across new, expansion, contraction and churn — leadership revenue reviews
- Calculate gross and net revenue retention by customer cohort — investor and board reporting
- Separate price, volume and mix effects within existing accounts — pricing decisions
- Design cohort tables that reveal renewal decay and payback timing — customer acquisition spend
- Test churn and expansion assumptions against cohort history — revenue outlook owners
- Communicate retention trends with clear charts and commentary — sales and customer success heads

## Key Recurring Revenue Analysis and Cohort Retention Terms

- Annual recurring revenue — the yearly value of contracted subscription or repeat revenue in force at a point in time.
- Revenue bridge — a walk from opening to closing revenue showing each cause of movement as a separate bar.
- Cohort — a group of customers sharing a start month or another common trait, tracked together over time.
- Net revenue retention — revenue kept from an existing cohort after expansion, contraction and churn, as a share of its starting revenue.
- Logo churn — the share of customers who end their contract or stop buying in a period.
- Customer lifetime value — the margin a customer is expected to generate over the whole relationship.

## Recurring Revenue Analysis and Cohort Retention Day by Day

### Day 1: Recurring Revenue Foundations and Data

- Revenue Type Classification — Recurring, Usage, One-Off and Services Lines
- Contract and Subscription Data Model — Linking Customers, Products and Terms
- Booking Versus Billing Versus Recognised Revenue — Which Measure Leaders Need
- Customer Master Cleansing — Merging Duplicate Accounts and Parent Groups
- Monthly Revenue Snapshot Design — Fixing the Measurement Point Each Period

### Day 2: Building the Revenue Bridge

- Opening to Closing Walk — New, Expansion, Contraction and Churn Bars
- Price, Volume and Mix Split — Separating Effects Within Existing Accounts
- Reactivation and Downgrade Rules — Consistent Classification of Edge Cases
- Bridge Reconciliation Checks — Agreeing Movements to the General Ledger
- Waterfall Chart Layout — Presenting Movement Clearly to Executives

### Day 3: Cohort Tables and Retention Ratios

- Start-Month Cohort Grid — Tracking Revenue Decay Across Months of Tenure
- Gross and Net Revenue Retention — Board and Investor Retention Measures
- Logo Churn Versus Revenue Churn — Reading Small and Large Account Losses
- Segment Cohorts by Channel and Plan — Where Retention Weakens First
- Customer Lifetime Value and Payback — Limits on Acquisition Spend

### Day 4: Projecting Revenue from Cohort Behaviour

- Renewal Curve Projection — Rolling Existing Cohorts Forward Month by Month
- New Customer Layering — Adding Future Cohorts From Pipeline Conversion
- Expansion and Price Uplift Assumptions — Evidence From Past Renewals
- Churn Scenario Ranges — Downside and Upside Retention Cases
- Projection Error Tracking — Comparing Cohort Projections With Actual Results

## Day 5: Practising the Recurring Revenue Bridge and Cohort Retention Model

- Bridge Build on Case Data — Applying Movement Classification Rules
- Cohort Grid Assembly — Applying Retention Ratios to Two Sectors
- Cohort-Based Outlook — Applying Renewal Curves and New Layers
- Retention Commentary Drafting — Explaining Movement to Commercial Leaders
- Recurring Revenue Bridge and Cohort Retention Model — Final Review and Handover

## Applying Recurring Revenue Analysis and Cohort Retention After the Course

- Rebuild the last twelve months of revenue as a monthly bridge and agree every movement category with sales operations.
- Publish a start-month cohort grid with gross and net revenue retention for each product line and share it with customer success.

## Recurring Revenue Analysis and Cohort Retention Questions FAQ

### What is recurring revenue analysis and cohort retention and why does it matter now?

It is the practice of explaining revenue movement by customer cause and tracking how customer groups keep or lose revenue over time. It matters now because investors judge recurring businesses on retention rather than bookings.

### Which roles gain most from recurring revenue analysis and cohort retention training?

Commercial finance analysts and FP&A staff who own revenue reporting gain most. Sales operations and customer success analysts also benefit, because they supply contract data and act on retention findings.

### How does recurring revenue analysis and cohort retention differ from a general forecasting course?

It centres on customer-level movement and cohort behaviour rather than three-statement models. It explains why revenue from existing and new customers changed and projects it from that evidence.

### What do you bring back from recurring revenue analysis and cohort retention training?

You bring back a working monthly revenue bridge and cohort retention grid built on case data. Both connect to your own contract records.

## Recurring Revenue Analysis and Cohort Retention: The Way Forward

The Recurring Revenue Bridge and Cohort Retention Model first informs where retention effort should go next month. Finance analysts maintain it, while sales and customer success leaders use its cohort grid to target renewals. After its first use, revisit how movement categories are defined, since consistent rules matter more than one month's figures.