# SalesPad for BC - Customer IQ

Product Development - 2026-09-16 - Customer IQ

Customer IQ answers two questions about every active customer in Business Central:

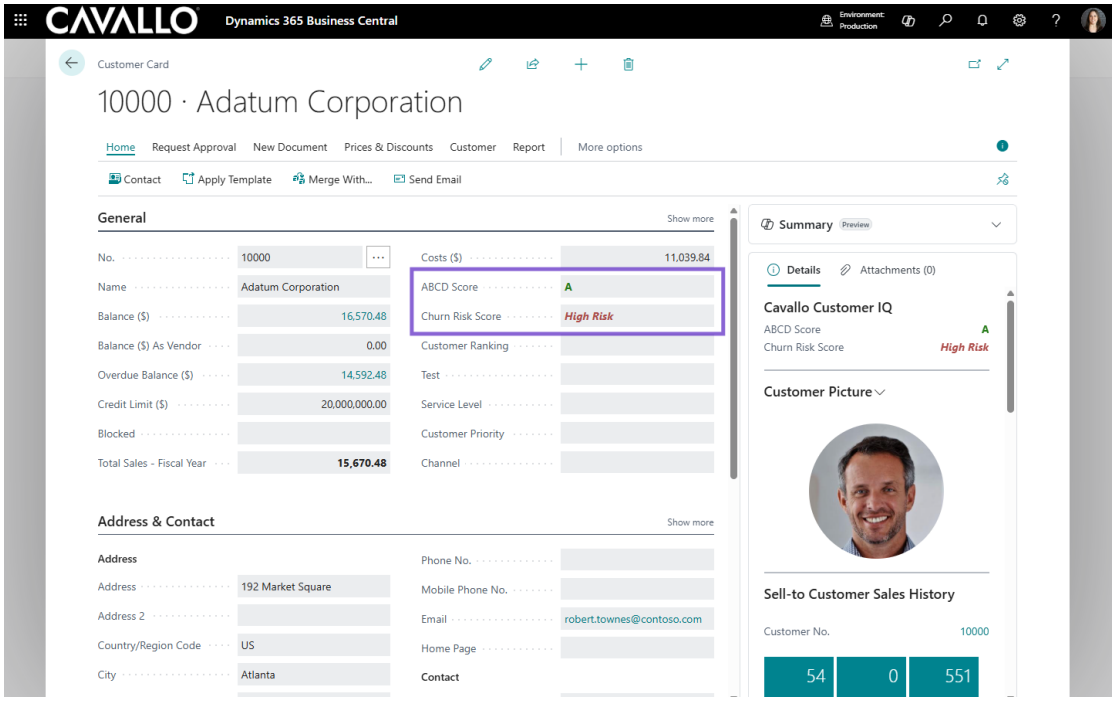
- **How valuable is this customer to my business?**
- **How likely is this customer to stop buying?**

These customer health insights appear directly on customer cards and sales orders inside BC, showing up right where your team already works.

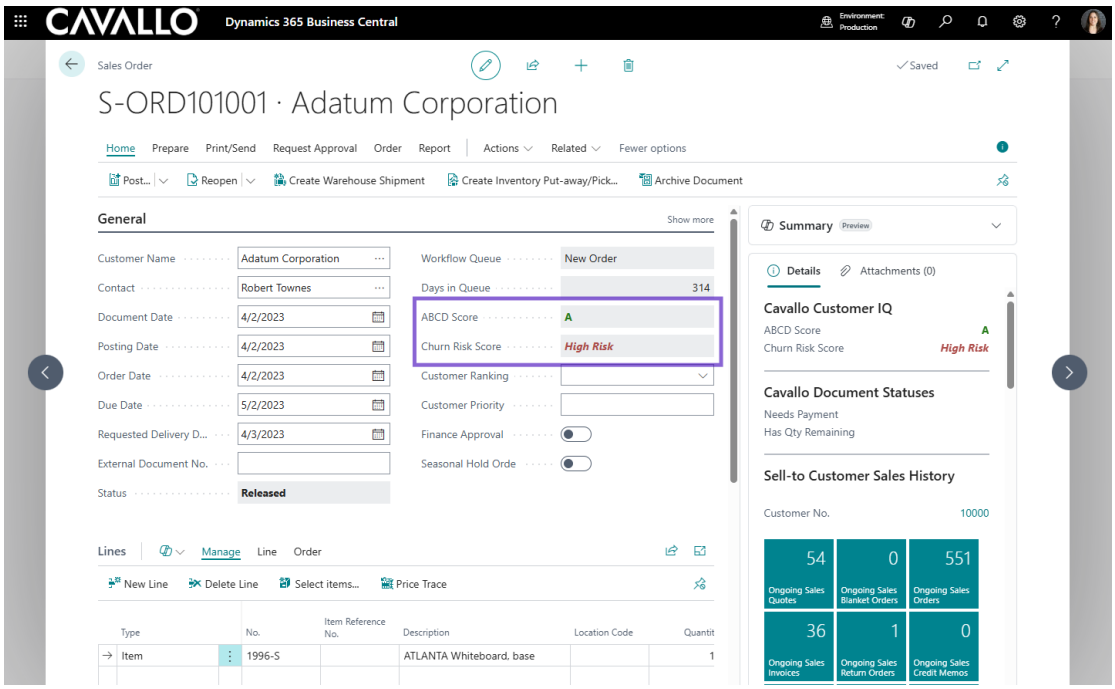

- Customer Health in BC
- ABCD Segmentation
- Churn Risk
- Setup
- Workflow Automation


## Customer Health in BC

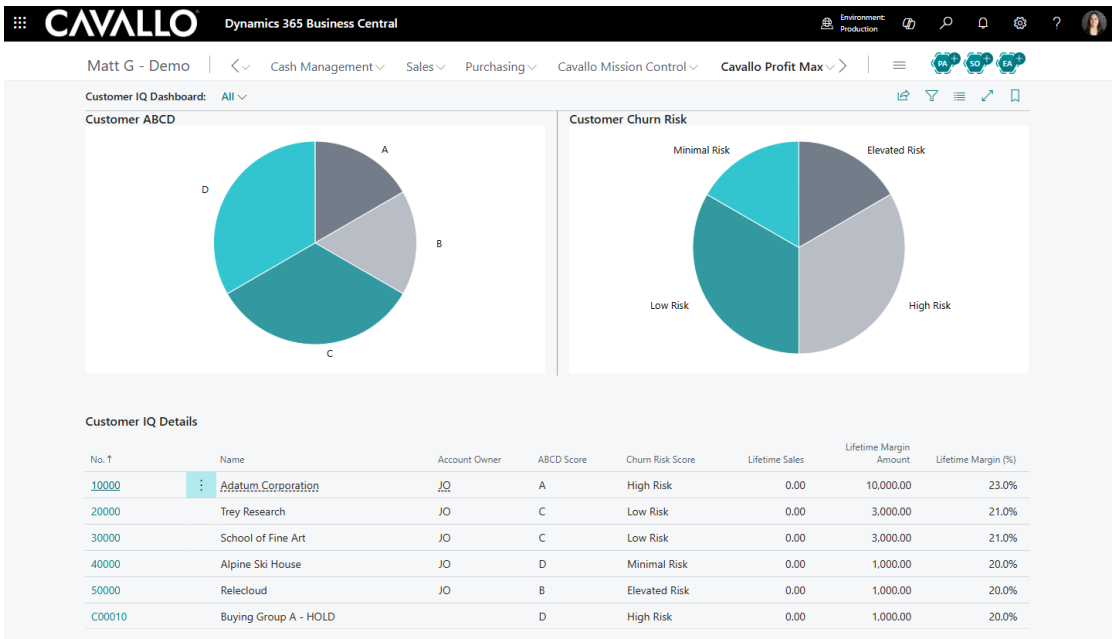
On the customer card, sales reps and CSRs can see account health at a glance.




When entering orders, customer health helps inform decision-making on sales quotes, orders, and invoices.




Customer IQ also adds a special dashboard in BC, accessible from the Cavallo Profit Max navigation option. This dashboard provides high-level visibility of customer health across the organization to help identify concern points and prioritize accounts that need proactive action to prevent churn.




## ABCD Segmentation

Review the Customer ABCD Segmentation Introduction for an overview of ABCD categories, thresholds, and configuration options.

### How to Use It

- 'A' customers are the most profitable accounts for your business — they often deserve priority attention, retention strategies, and white-glove treatment
- 'B' and 'C' customers represent opportunities for growth and value expansion
- 'D' customers (accounts with negative margin) warrant a closer look — is their pricing misaligned? Are they getting excessive discounts, especially on high-cost items?

# Churn Risk

Review the Customer Churn Prediction Introduction for an overview of churn prediction, risk categories, and calculation methods.

In addition to churn likelihood, Customer IQ also surfaces **Margin at Risk** — the total gross profit from the past 365 days across all customers at Elevated or High risk. This provides a concrete dollar figure for what's at stake to help prioritize retention efforts.

### How to Use It

A customer at Elevated or High risk is showing buying behavior patterns associated with customers who have churned in the past.  This is your signal to reach out — a proactive call, a discount offer, a check-in — while the relationship is still active.  Combine this with customer ABCD insights and prioritize 'A' customers to prioritize retention of your most profitable accounts.

# Setup

### With Mission Control

If you also buy Mission Control, then that setup process includes steps that establish communication between Mission Control and Business Central.  Complete those setup steps before continuing with Customer IQ setup.

### Without Mission Control

If you buy Customer IQ without Mission Control, then you must provide your Business Central Tenant / Entra ID to Cavallo.  This allows Customer IQ to connect to your specific BC environment.

Your BC Tenant / Entra ID can be found by clicking the ? at the top right of Business Central, selecting "Help & Support", and copying the full text of the "Azure AD Tenant/Entra ID:" section at the bottom.  This must be completed before Customer IQ can be used.

# Workflow Automation

****Workflow automation requires Mission Control.** If you don't use Mission Control but would like to, please reach out to Cavallo.

When Customer IQ is paired with Mission Control, you can build automated routing rules based on ABCD and churn data — no code required. Instead of relying on your team to manually check scores before making decisions, workflow handles order routing automatically.

This enables:

- **VIP routing for 'A' customers** — orders for 'A' customers can be automatically routed to a dedicated handling queue — ensuring your most valuable accounts always get priority treatment
- **Proactive outreach for at-risk accounts** — when a customer at Elevated or High risk places an order, workflow can route it to a manager or sales rep for a personal touchpoint before it ships.  The order doesn't get lost — it gets a human moment at exactly the right time to encourage retention
- **Review routing for 'D' customers** — orders for 'D' customers can be automatically flagged and sent to a review queue so someone can assess whether pricing needs adjustment or a conversation needs to happen, or whether to proceed as normal

Mission Control can route documents based on certain conditions, reroute documents to manager review queues, and automate processing based on certain conditions.  Each of those situations can be based on Customer IQ's document-level fields for ABCD Score and Churn Risk Score.  Refer to those linked support articles for more information on configuring each scenario.