



THE
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INDEX

ANONYMIZED PORTFOLIO REVIEW SAMPLE

Example Outside-In Customer Portfolio Review

A sample service brief showing how public external signals can be reviewed across a customer portfolio.

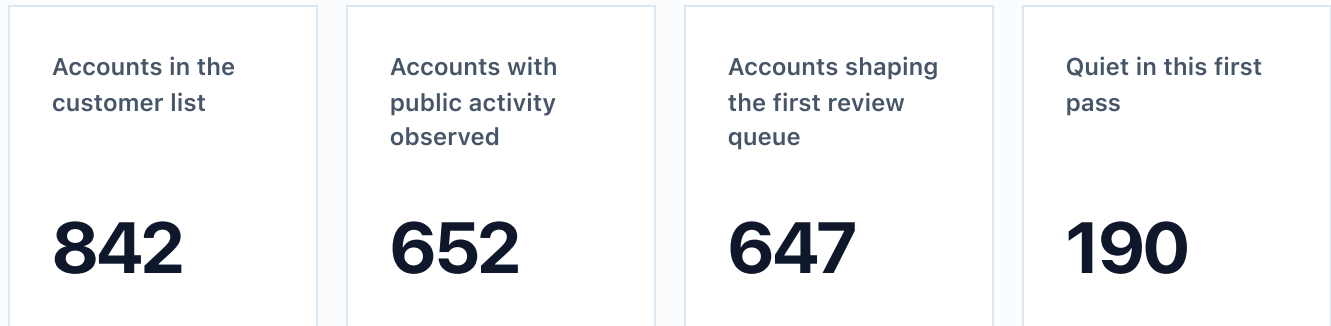
This sample shows what a first-pass outside-in portfolio review can produce from a defined customer list.

The first pass is not about finding everything. It is about finding where to look first.

What the outside-in review made visible

The first pass is not about finding everything. It is about finding where to look first.

This sample shows what a first-pass outside-in portfolio review can produce from a defined customer list. Public external activity was collected across the cohort, noisy items were filtered, and review-shaping signals were organized into a first queue for follow-up.



In the past 90 days, the review surfaced 516 visible public items across 171 accounts. From that activity, 252 review-shaping signals across 145 accounts helped shape the first review queue.

Broader history shows context. Recent activity drives what gets reviewed first.

Broader review history shows how much public signal context exists across the defined customer list. The 90-day view shows where recent external activity is concentrated enough to shape near-term follow-up.

Across broader review history	
Public items reviewed across the broader history we can inspect	
METRIC	VALUE
Visible public items	2,324
Review-shaping signals	1,997
Accounts with public activity	652
Accounts with review-shaping signals	647

Within the past 90 days	
More recent activity that may deserve immediate follow-up	
METRIC	VALUE
Visible public items	516
Review-shaping signals	252
Accounts with public activity	171
Accounts with review-shaping signals	145

Taken together, the two views answer two different questions: how much of the portfolio has signal history at all, and where current activity is clustering now.

SIGNAL TYPES

The portfolio is not driven by one kind of public change

The review sorts activity into buyer-readable signal types so the team can see what is happening now, while still keeping older context in view.

Layoffs & site closures	PAST 90 DAYS PUBLIC ITEMS 116	PAST 90 DAYS REVIEW-SHAPING 103
<p>This remains the broadest historical layer across the cohort, but the current portfolio review is shaped by a smaller recent set rather than the full retained WARN footprint.</p> <p>Broader review history public items: 1,900</p>		
Company change	PAST 90 DAYS PUBLIC ITEMS 396	PAST 90 DAYS REVIEW-SHAPING 145
<p>Company-change signals account for most of the current review activity and often explain why an account deserves attention now.</p> <p>Broader review history public items: 418</p>		
Security / resilience	PAST 90 DAYS PUBLIC ITEMS 4	PAST 90 DAYS REVIEW-SHAPING 4
<p>Small in count, but useful when present because it broadens the account picture beyond workforce or operating change.</p> <p>Broader review history public items: 6</p>		

The first review queue, ranked for follow-up

The goal is not to show every record. The goal is to give the team a clean first queue, with enough context to know why each account surfaced and when recent public change last appeared.

RANK	ACCOUNT	PRIMARY SIGNAL TYPE	SIGNAL MIX	LATEST PUBLIC CHANGE	REASON SURFACED
1	Account 041	Company change	7 company change · 2 layoffs & site closures	2026-05-20	Current company-change activity landed alongside workforce-related context, pushing this account to the front of the queue.
2	Account 118	Company change	7 company change	2026-04-28	Concentrated legal and transaction-related activity made this account worth an early look.
3	Account 203	Company change	4 company change · 1 layoffs & site closures	2026-05-20	Mixed company-change, security, and workforce context broadened the review beyond a single event.
4	Account 247	Company change	5 company change	2026-05-20	Current rebranding and leadership-related activity made the account reviewable without a large workforce footprint.
5	Account 312	Company change	4 company change	2026-05-01	Recent company-change signals were specific enough to surface even with a smaller count.
6	Account 389	Company change	3 company change · 1 security / security/resilience	2026-05-20	Security and company-change context combined to make the account worth review.

Example signal evidence

These anonymized examples show the evidence that sits behind the structured brief. Each item was judged before it shaped the portfolio review.

ACCOUNT	SIGNAL TYPE	WHAT SURFACED	EVIDENCE OUTCOME	WHY IT MATTERED
Account 041	Company change + workforce context	Recent company-change coverage surfaced alongside statutory workforce notices and follow-on public reporting.	Included in structured brief	The multi-family pattern made the account a first-batch review candidate instead of background context.
Account 389	Security / resilience	A public vulnerability advisory appeared alongside adjacent company-change coverage in the same review window.	Included plus supporting context	It broadened the review beyond workforce-related activity and changed how the account should be read.
Account 508	Company change	A market-summary republisher row mentioned the account from a noisy finance source family.	Excluded from structured brief	The item was visible, but it did not add reliable account context and was set aside rather than shaping the queue.

One surfaced account can be explained without opening the whole dataset

This example shows how a single account can carry both long-running context and more current activity at the same time.

EXAMPLE ACCOUNT

Account 041

Company change + workforce context · This account surfaced because newer company-change activity sat on top of an existing workforce-related picture.

Review priority

Current activity

Retained context

This account rose in the queue because recent company-change activity changed how older workforce context should be read now. It is highlighted because the evidence pattern concentrated, not because any single row claims to be a complete verdict.

SIGNAL COMPOSITION



- Layoffs & site closures 9
- Company change 8

WHY THIS MATTERS NOW



9

Past 90 days

visible in the recent review window

8

Outside 90 days

older context kept in view

Recent signals help explain why the account is highlighted now. Older signals still matter because they give the current picture weight and continuity.

Different teams use the brief in different ways

The same outside-in portfolio review can help leadership inspect concentration earlier, help account teams prepare more intelligently, and help operations teams apply one consistent lens across the book.

Finance / GTM leadership

Use the brief in renewal reviews, executive readouts, and forecast conversations when external change appears to be clustering across the portfolio.

- See which segments or books of business may deserve closer portfolio inspection.
- Bring outside-in context into forecast and planning conversations without treating the brief as a verdict.

CS / account leaders

Use the review to prepare for account planning and renewal conversations where public change may affect sponsorship, operating stability, or timing.

- Decide which accounts deserve a closer human review before the next customer conversation.
- Pair outside-in evidence with internal account context before escalating or changing a plan.

RevOps / CS Ops

Use one consistent portfolio inspection process to support prioritization across teams, renewal cohorts, and executive readouts.

- Organize follow-up around accounts where multiple independent signals are clustering.
- Help teams compare review queues across regions, segments, or books of business.

Each public item passes through the same review process before it is included, held as supporting context, or set aside from the structured brief.

Every item ends up in one of three review outcomes.

Included in the structured brief

The signal was specific enough, relevant enough, and strong enough to shape how the account should be read.

Held as supporting context

The item added useful background or corroboration, but did not carry enough weight to move the queue on its own.

Left out of the structured brief

The item was reviewed and set aside because it did not improve relevance, confidence, or buyer usefulness.

If you'd like to know more about our services, we'd be glad to talk.

The Lumen Index provides outside-in customer portfolio reviews and related evidence-led services to support renewal preparation, account planning, and executive review.

hello@thelumenindex.com

Get in touch to talk through the service, typical inputs, and what a review can look like for your team.