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ANONYMIZED PORTFOLIO REVIEW SAMPLE

# What a first review reveals across a customer portfolio

Sample brief for an anonymized portfolio review

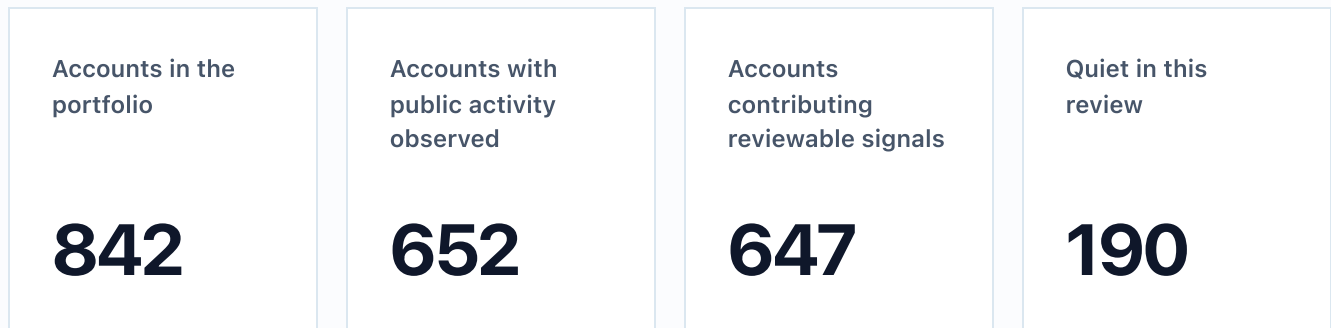
A first-pass review of visible external organizational change across 842 monitored accounts.

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

# What the first review made visible

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

This first portfolio review turned a defined company list into a reviewable view of external organizational change. Public activity was collected across the cohort, narrowed into review-shaping signals, and ranked into an initial queue for follow-up.



In the past 90 days, the cohort produced 516 visible records and 252 review-shaping signals across 171 accounts, with 145 accounts contributing reviewable signals.

# Coverage shows breadth. The 90-day view shows what feels current.

Retained history shows how much external signal context exists across the portfolio. The 90-day view shows where visible change is current enough to shape near-term review.

<b>Across retained cohort history</b>	
Signals retained across the broader history we can inspect	
METRIC	VALUE
Visible signals	<b>2,324</b>
Admitted signals	<b>1,997</b>
Accounts with any signal	<b>652</b>
Accounts with admitted signal	<b>647</b>

<b>In the past 90 days</b>	
More recent activity that may deserve immediate follow-up	
METRIC	VALUE
Visible signals	<b>516</b>
Admitted signals	<b>252</b>
Accounts with any signal	<b>171</b>
Accounts with admitted signal	<b>145</b>

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 visible change

The first 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 VISIBLE

**116**

PAST 90 DAYS ADMITTED

**103**

This remains the broadest historical layer across the cohort, but the current review is shaped by a smaller recent set rather than the full retained WARN footprint.

Retained-history visible items: 1,900

### Company change

PAST 90 DAYS VISIBLE

**396**

PAST 90 DAYS ADMITTED

**145**

Company-change signals account for most of the current review activity and often explain why an account is worth attention now.

Retained-history visible items: 418

### Security / resilience

PAST 90 DAYS VISIBLE

**4**

PAST 90 DAYS ADMITTED

**4**

Small in count, but useful when present because it broadens the account picture beyond workforce or operating change.

Retained-history visible items: 6

## REVIEW PRIORITIES

# These are the accounts the team would review first

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 visible change last appeared.

RANK	ACCOUNT	PRIMARY SIGNAL TYPE	SIGNAL MIX	LATEST VISIBLE CHANGE	REASON SURFACED
1	<b>Account 041</b>	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	<b>Account 118</b>	Company change	7 company change	2026-04-28	Concentrated legal and transaction-related activity made this account worth an early look.
3	<b>Account 203</b>	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	<b>Account 247</b>	Company change	5 company change	2026-05-20	Current rebranding and leadership-related activity made the account reviewable without a large workforce footprint.
5	<b>Account 312</b>	Company change	4 company change	2026-05-01	Recent company-change signals were specific enough to surface even with a smaller count.
6	<b>Account 389</b>	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

# Example signal evidence

These anonymized examples show what sits behind the review queue. Each item was judged before it shaped the portfolio view.

ACCOUNT	SIGNAL TYPE	WHAT SURFACED	EVIDENCE OUTCOME	WHY IT MATTERED
<b>Account 041</b>	Company change + workforce context	Recent company-change coverage surfaced alongside statutory workforce notices and follow-on public reporting.	Included in portfolio view	The multi-family pattern made the account a first-batch review candidate instead of background context.
<b>Account 389</b>	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.
<b>Account 508</b>	Company change	A market-summary republisher row mentioned the account from a noisy finance source family.	Excluded from portfolio view	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 first pass in different ways

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

<p><b>Finance / GTM leadership</b></p> <p>See where external organizational change is concentrating across the portfolio before it shows up in forecast or customer-planning conversations.</p> <ul style="list-style-type: none"><li>• Spot concentration across segments, regions, or customer groups.</li><li>• Stress-test timing assumptions when multiple accounts show visible change at once.</li></ul>	<p><b>CS / account leaders</b></p> <p>Prepare earlier when customers are undergoing visible external change that may affect sponsorship, adoption, or renewal timing.</p> <ul style="list-style-type: none"><li>• Revisit stakeholder assumptions when leadership or workforce change becomes public.</li><li>• Use external context to decide which accounts need a closer look before the next conversation.</li></ul>	<p><b>RevOps / CS Ops</b></p> <p>Apply one consistent portfolio-first review process instead of relying on ad hoc account-by-account checks.</p> <ul style="list-style-type: none"><li>• Compare external visibility across teams, regions, and books of business.</li><li>• Focus weekly inspection where multiple independent signals are clustering.</li></ul>
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Each item passes through the same evidence process before it is included, held as supporting context, or left out of the portfolio view.

Every item ends up in one of three review outcomes.

<p><b>Included in the portfolio view</b></p>	<p><b>Held as supporting context</b></p>	<p><b>Left out of the portfolio view</b></p>
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NEXT STEP

# Send a company list. Get a first-pass portfolio review.

[hello@thelumenindex.com](mailto:hello@thelumenindex.com)

Send a customer company list. We run a first-pass external signal review and return a portfolio brief with evidence-linked account context.