Customer Success Plan: From Goals to Execution

- - This training turns retention, adoption, and expansion goals into an owned operating plan
- - For customer-success leads and cross-functional teams needing one aligned execution plan
- - Outcomes: a repeatable planning method, clear owners, and measurable execution milestones

Why Strategy Fails Without an Operating Plan

- Strategy sets intent; operating models define mechanics & ownership

- Reactive CS causes surprise churn, missed expansion, and burnout

- Structured CS operations correlate with 15-30% higher NRR

Core Building Blocks of a Customer Success Plan

- Plan connects goals, metrics, segmentation, ownership, and rhythm
- Core components: outcomes, milestones, stakeholder maps, risks, expansion paths
- Strategy defines direction; plan maps account-specific roadmap
- Playbook encodes repeatable plays for consistent execution
- Living document reviewed on a defined cadence, not static

Aligning Goals Across Teams

- Shared metrics—especially NRR—align sales, product, support, and CS
- Agree on definitions for health, risk, adoption, and renewal readiness
- Replace conflicting incentives with shared OKRs
- Codify shared data visibility, not just shared meetings
- A single scorecard turns blame games into problem-solving
- Misalignment is structural, not just a communication issue

From Goals to Prioritized Actions

- Cascade goals into time-bound actions with owners and measurable criteria
- Prioritize by segment and business impact; avoid overly broad plans
- Use OKRs and Next Best Action to break plans into immediate moves
- Identify the single action that unlocks momentum, even if imperfect

Assigning Ownership and Accountabilities

- Use RACI (Responsible, Accountable, Consulted, Informed) for every milestone
- Name individual owners on both vendor and customer sides
- One accountable owner per deliverable to prevent deadlock
- Address handoff gaps between sales, CS, support, and product explicitly

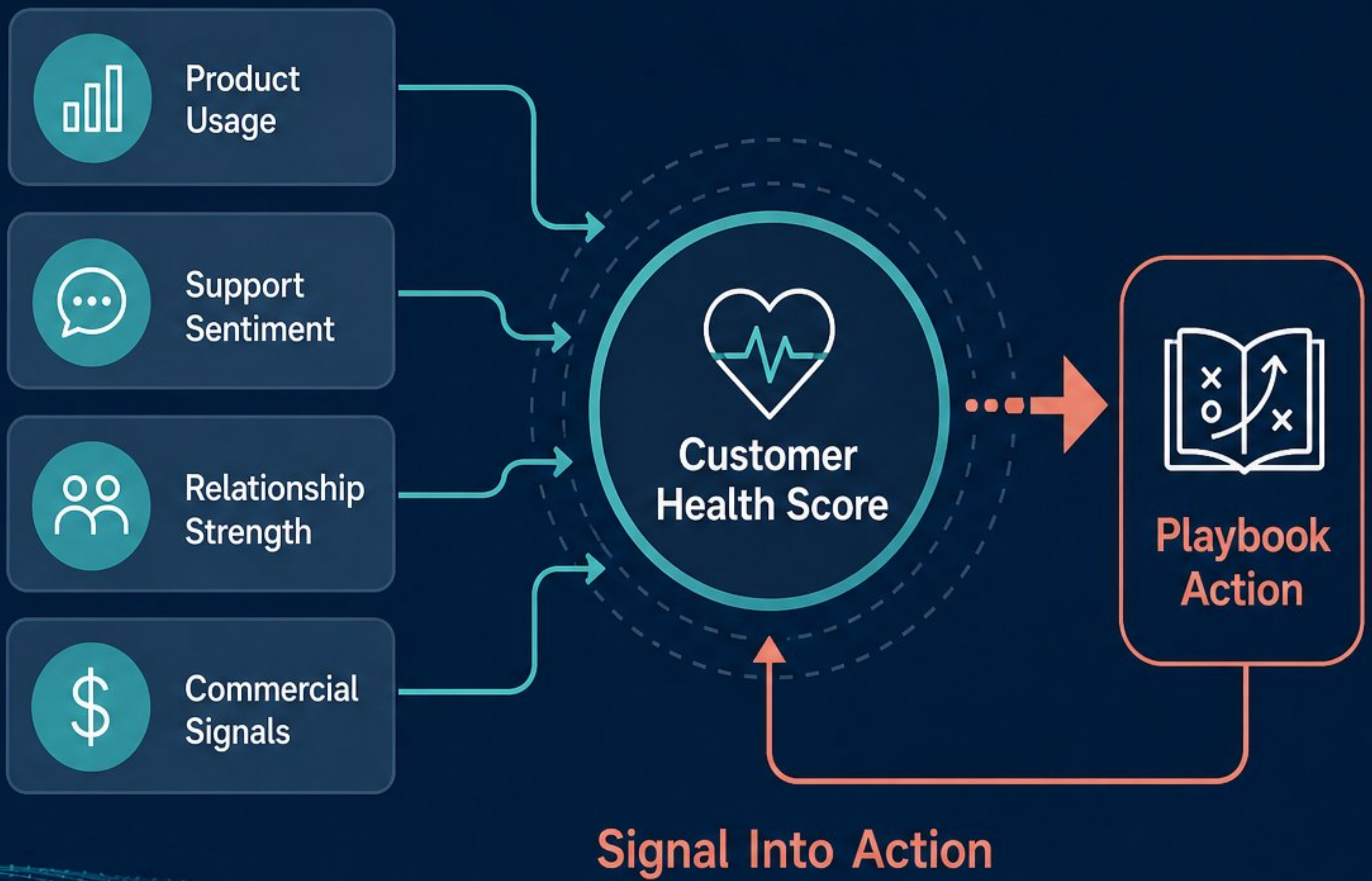
RACI RESPONSIBILITY MATRIX

	Responsible	Accountable	Consulted	Informed
Milestone 1	R	A	C	I
Milestone 2	R	A	C	I
Milestone 3	R	A	C	I
Milestone 4	R	A	C	I

Operating Cadence and Performance Reviews

- Weekly health checks review score thresholds and flag at-risk accounts
- Monthly reviews analyze trends, segment variance, and forecast accuracy
- Quarterly business reviews anchor value delivered and next-quarter goals
- Weight leading indicators (health, time-to-value, adoption) over lagging outcomes
- Treat the plan as a living document, not a static artifact

Executing Through Customer Signals and Data



- Customer health score merges product usage, support, relationship, and commercial signals
- Every score must trigger a playbook; a score without action is decoration
- Cap metrics at 8–12, tiered by executive, operational, and diagnostic views

Practical Adoption and Retention Playbooks

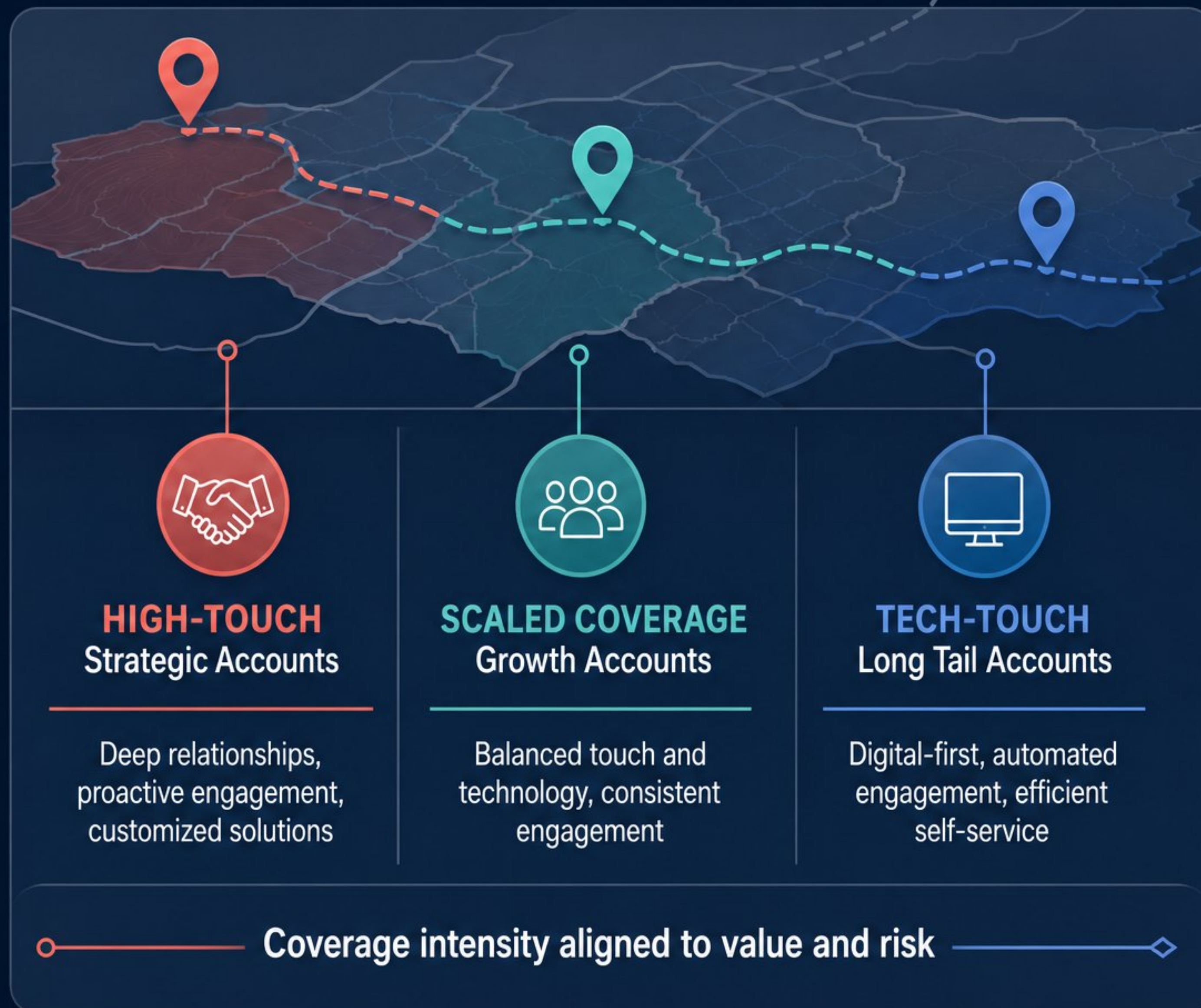
- Onboarding playbooks accelerate time-to-value, the strongest predictor of first-year retention
- Adoption plays react to usage drops and feature gaps with targeted outreach
- Risk playbooks trigger on health-score dips, champion departure, support spikes
- Renewal plays begin 90 days early, confirming value before commercial talks

Expansion Planning as Part of the Operating Rhythm

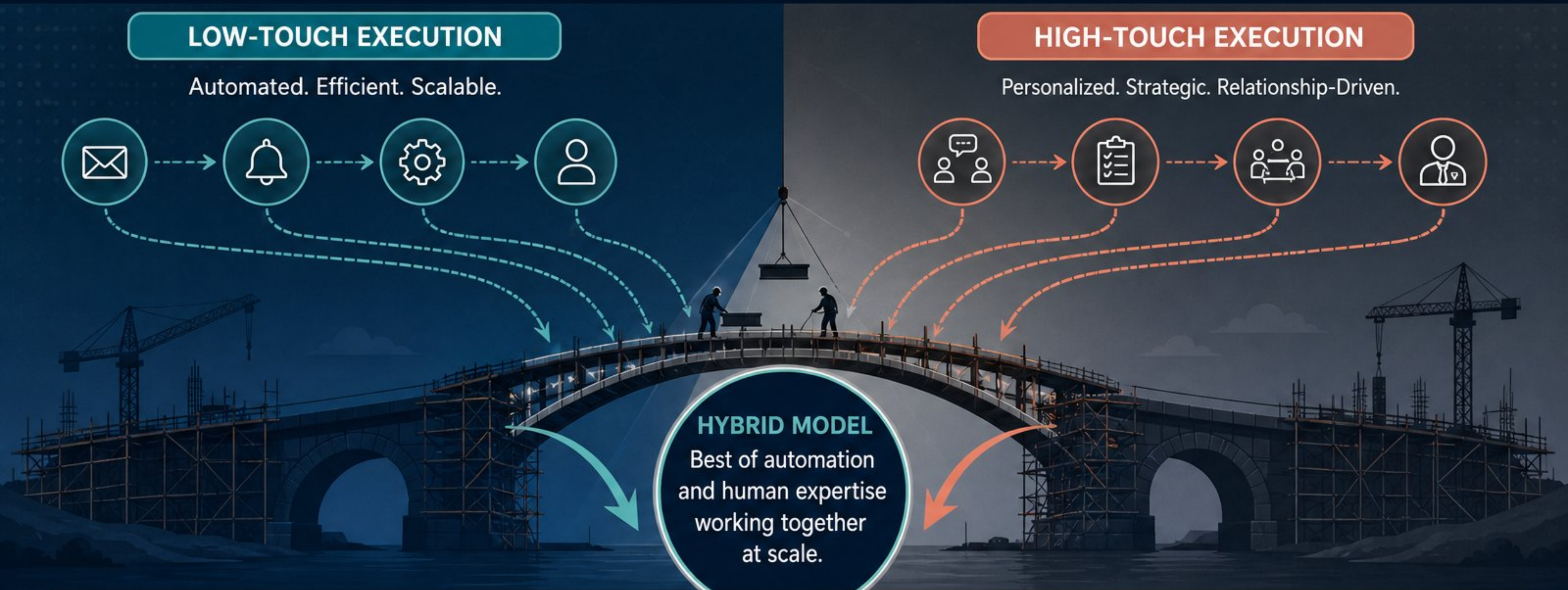
- Treat expansion as a CS motion, not a sales-only effort
- Drive signals from health and usage data, not calendar dates
- Trigger on 85%+ seat utilization or approaching feature limits
- Anchor conversations in value via QBRs and executive reviews

Segmentation and Coverage Models

- Segment by commercial value, expansion potential, and churn risk
- Match coverage intensity to segment value
- High-touch for strategic accounts; tech-touch for long tail
- One universal model misfits every account
- Re-segment regularly; static models misallocate capacity



Scaled Engagement: Low-Touch and High-Touch Execution



- Low-touch plans: behavior-triggered automation, self-service, pooled CSM resources
- High-touch plans: dedicated CSMs, structured onboarding, QBRs, executive sponsorship
- Hybrid models: automation for predictable steps, human intervention for judgment calls
- Define triggers, owners, and metrics to make execution consistent at scale

Building Your Customer Success Operating Plan

- Facilitate a working session to produce a documented plan with owners, cadence, and escalation paths
- Define 30-, 60-, and 90-day milestones with specific definitions of done
- Start with a quick win, like standardizing the sales-to-CS handoff
- Then iterate into health scoring, playbooks, and a living operating system

From Plan to Living System

- - Unreviewed plans become artifacts; governance creates a living system
- - Track coverage, milestone velocity, and renewal differentials
- - Recalibrate health scores quarterly against actual churn
- - Refresh playbooks and revisit segmentation as accounts evolve