

Customer Success Plan

Example: Patterns, Strengths, and Pitfalls



Learn by studying one realistic plan through three lenses



Patterns to repeat, strengths that produce outcomes, pitfalls that erode renewal



Distinguish the plan from an onboarding checklist, project plan, QBR deck, playbook



Each role needs different depth: CSM builds, CS Ops standardizes, leads audit, instructors teach



Anchor: what the customer is trying to achieve, how both sides know, who owes what by when



What a Customer Success Plan Is and Is Not



-  **A shared, written roadmap from business objective to measurable outcome**
-  Turns customer goals into outcomes, milestones, owners, risks, cadence
-  Defining feature: measurable criteria in the customer's own business terms
-  Not a project plan, QBR deck, account plan, playbook, or onboarding checklist
-  Plan vs. playbook: playbook repeats across accounts; plan belongs to one
-  Account plan is internal: churn risk, competitive threats, expansion math

Anatomy of the Example Plan, Section by Section



The Compact Five-Column Version Customers Actually Use



Five columns: outcome, metric with baseline, owner each side, date, status



Start from the last rows of the sales mutual action plan



Customer owner = person measured on the outcome, not the admin



Four statuses only: on track, at risk, done, dropped



Retire any row unchanged for two reviews



Cadence: baseline day 10, review day 30, 60, 90, then quarterly

Outcome	Metric with baseline	Customer owner	Your owner	Date	Status
—	—	—	—	—	—
—	—	—	—	—	—
—	—	—	—	—	—
—	—	—	—	—	—
—	—	—	—	—	—

Pattern 1: Outcome-First Framing With a Captured Baseline



Outcomes, not activities:
“close month-end in 5 days, not 9, by end of Q2”



Activities nobody renews for:
onboarding complete, integration enabled,
training run



Two-person test: could two people agree
in six months whether it happened?



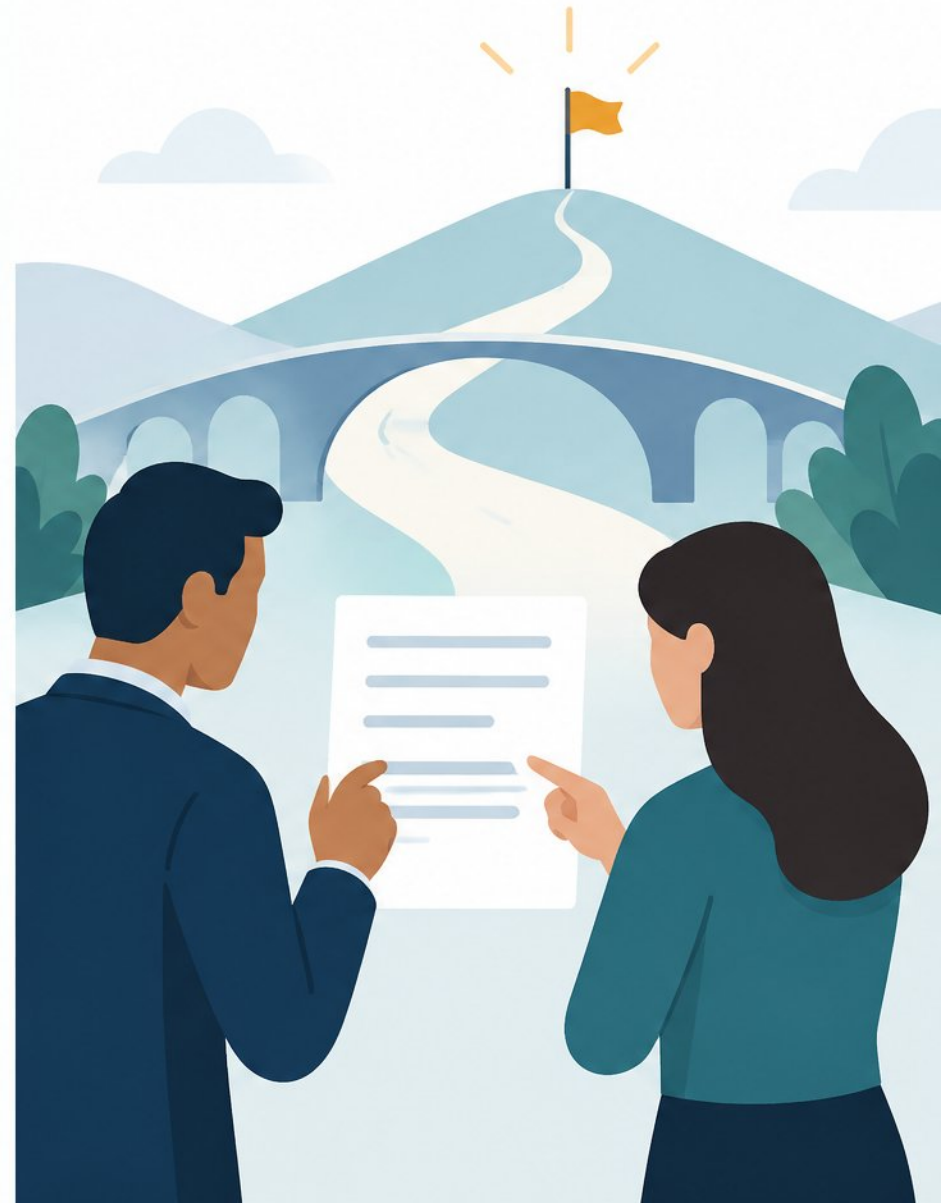
Baselines are the most skipped step;
a reasonable estimate at kickoff beats
a later reconstruction



No number today? Then row one becomes
getting the measurement — a 30-day outcome



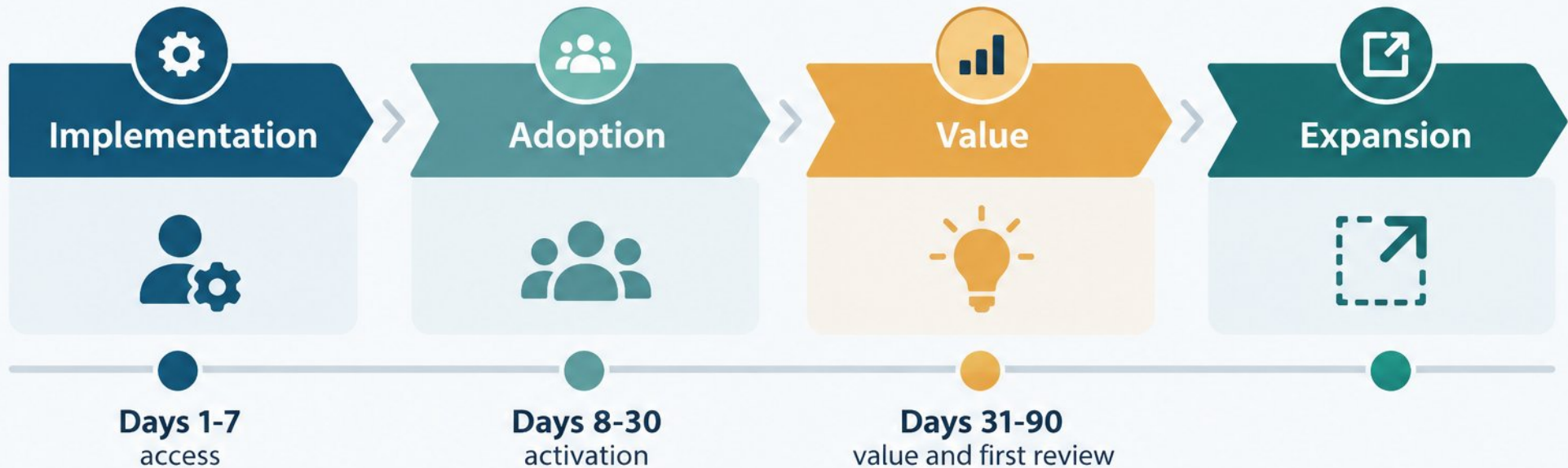
One sentence, customer's words, with a
number attached



Pattern 2: Stakeholder Mapping and Joint Accountability



Pattern 3: Milestone Sequencing From Onboarding to Value Realization



Milestones are what the customer's team can act on next week



Four stages: implementation, adoption, value, expansion



Break each criterion into 3-4 in-product steps, observed in product data



Days 1-7 access; 8-30 activation; 31-90 value and first review



Add customer validation after technical completion, not just delivery

Pattern 4: Risk, Dependency, and Cadence Discipline

Type	Item	Indicator	Response	Owner	Escalation Trigger	Review Moment
Risk	Single-threaded champion	At risk	Develop backup support		If champion becomes unavailable	
Risk	Competing priorities	On track	Reconfirm and realign		If priorities shift again	
Risk	Integration complexity	At risk	Engage technical resources		If issues block progress	
Risk	Unclear ownership	Dropped	Assign and confirm ownership		If ownership remains unclear	
Dependency	Upstream system readiness	Done	Coordinate completion		If delayed past latest useful completion date	
Dependency	Downstream feature release	On track	Align and validate dependencies		If delay affects downstream effect	



Pre-load risk categories: single-threaded champion, competing priorities, integration complexity, unclear ownership



Each risk needs an observable indicator, a response, an owner, and an escalation trigger



Track dependencies with latest useful completion date and downstream effect



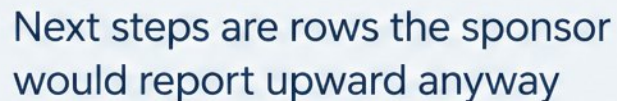
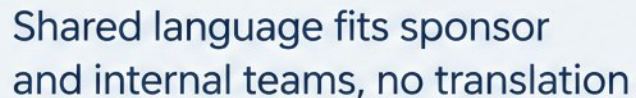
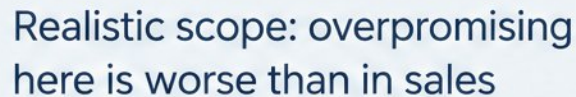
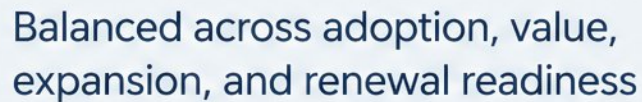
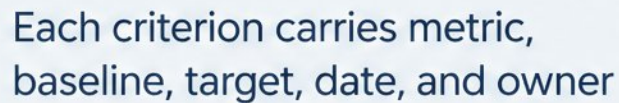
Attach the plan to a meeting that already exists — never a new one



Watch health signals between reviews: usage, tickets, sentiment, champion engagement



Version and approve material changes to outcomes, scope, dates, or owners



Pitfalls: Common Failure Modes and How to Catch Them Early

Common failure modes

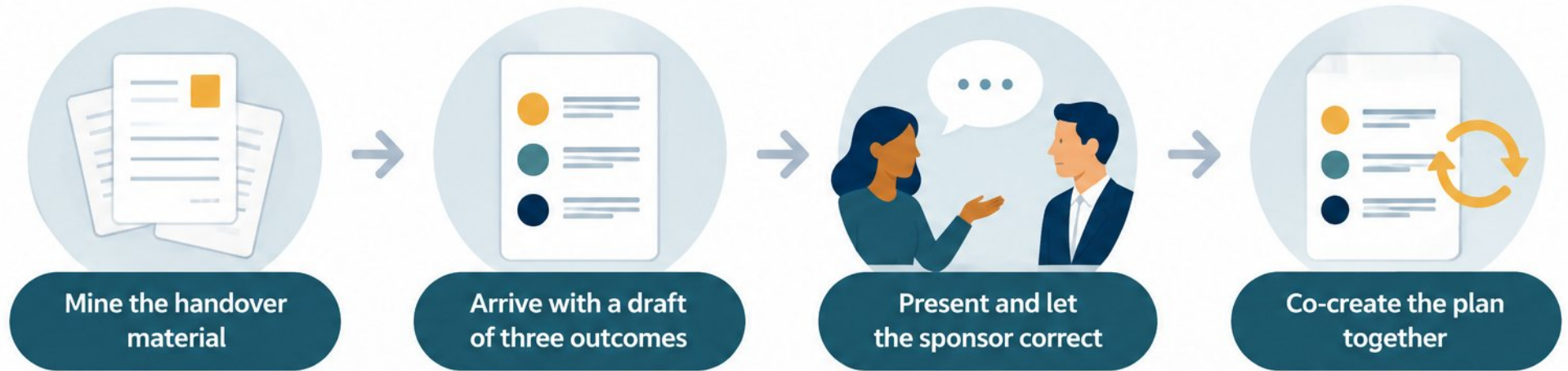
-  1 Vague outcomes – "increase adoption", "improve efficiency" – no metric, baseline, or date; ambiguity resurfaces at renewal
-  2 Ownership assigned to "the customer" rather than a named person with authority to act
-  3 Built once as an onboarding artifact; length is the best predictor of abandonment
-  4 Internal jargon and feature names stop customers from opening the document
-  5 No risk register, dependency tracking, or escalation path; problems surface urgent
-  6 Sales promises misaligned with onboarding reality and renewal expectations
-  7 Diagnostic: if the customer never references the plan first, it is yours, not shared

When it typically surfaces

-  Early planning
-  During onboarding
-  During onboarding
-  Before they engage
-  When issues arise
-  At renewal time
-  Ongoing

Building and Co-Creating Your Own Plan From the Example

Start with the example. Make it real together.



-  Mine the sales handover: business case, discovery notes, final MAP rows
-  Arrive at kickoff with a draft, not a blank page
-  Present three outcomes in the sponsor's words; let them correct
-  Co-create so the plan becomes theirs, not yours
-  If a fourth outcome appears, one of the first three leaves
-  Book day 30, 60, and 90 reviews at kickoff

Tailor Depth by Account Type



Enterprise



Mid-Market



Scaled

Metrics, Reviews, and Governance Rhythm



Retention



Named owner



Pre-defined response



Adoption



Named owner



Pre-defined response



Satisfaction



Named owner



Pre-defined response



Support Efficiency



Named owner



Pre-defined response

- Pick 5–7 metrics across four groups: retention, adoption, satisfaction, support efficiency
- Review leading indicators weekly; review lagging indicators quarterly
- Leading indicators buy runway; lagging indicators confirm the fix worked
- Every metric needs a named owner and a pre-defined response
- Run the cycle at four speeds: weekly, monthly, quarterly, annual



Practice: Review Checklist and Scenario Critiques

Checklist



- **Checklist:** baselines, 2–3 measurable criteria, named buyers and blockers

Scenario Critiques

Scenario A



- Scenario A: professional structure, weak metrics — add number, date, baseline

Scenario B



- Scenario B: actions assigned to "the customer" — name one owner per side

Scenario C



- Scenario C: overpromising, no dependency tracking — review internally, add dependency rows



Peer review

- Peer review: two-person test, owner authority, customer opened it first



Use it during

- Use during onboarding, QBR prep, pre-renewal, and sales-to-CS handoff

Adapting the Example Across Segments and Roles, Then Acting on It

Segments



Enterprise

Enterprise: named CSM, phased rollout with milestone gates, executive reviews



Mid-market

Mid-market: structure without overhead; automation plus check-ins at key milestones



SMB

SMB: self-serve onboarding, in-app nudges, pooled or tech-touch coverage

Review Cadence



Roles



CSMs



CS Ops



Leads

Roles: CSMs build, CS Ops standardizes and instruments, leads audit quality

Plan Guidance



Tier the plan — different experience, not a lesser one; review tiers quarterly



Start with one compact format on one at-risk account before portfolio rollout



Same example. Tailored approach.
Actionable outcomes.

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