

What Does a Customer Success Manager Do:

An Introduction

- A CSM proactively drives customer outcomes, not reactive support or sales.
- Born from the SaaS subscription shift: retention is the growth engine.
- Core mission: fuel value realization, reduce churn, expand lifetime value.
- Daily rhythm blends strategic advising with data-driven health monitoring.



The Business Case: Why Customer Success Is a Growth Engine



Keeping customers costs less than acquiring new ones



Churn erodes recurring revenue and company valuation



CSMs protect and expand revenue (renewals, upsell, advocacy)



Key metrics: NRR (target 110%+), GRR, LTV:CAC

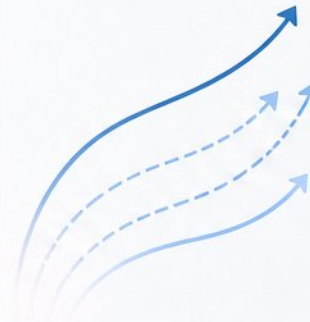


CS orgs use pooled, named, or segment-based models

Churn Erodes
Recurring Revenue



Customer Success
Drives Growth



Key Metrics
That Matter



NRR
(target 110%+)



GRR



LTV:CAC



The 2026 CSM: Skills, Mindset, and AI Fluency



- Shift from reactive manager to proactive, commercial strategic advisor



- Hard skills: Data literacy, product telemetry, business acumen, AI tools



- Soft skills: Consultative communication, empathy, executive presence



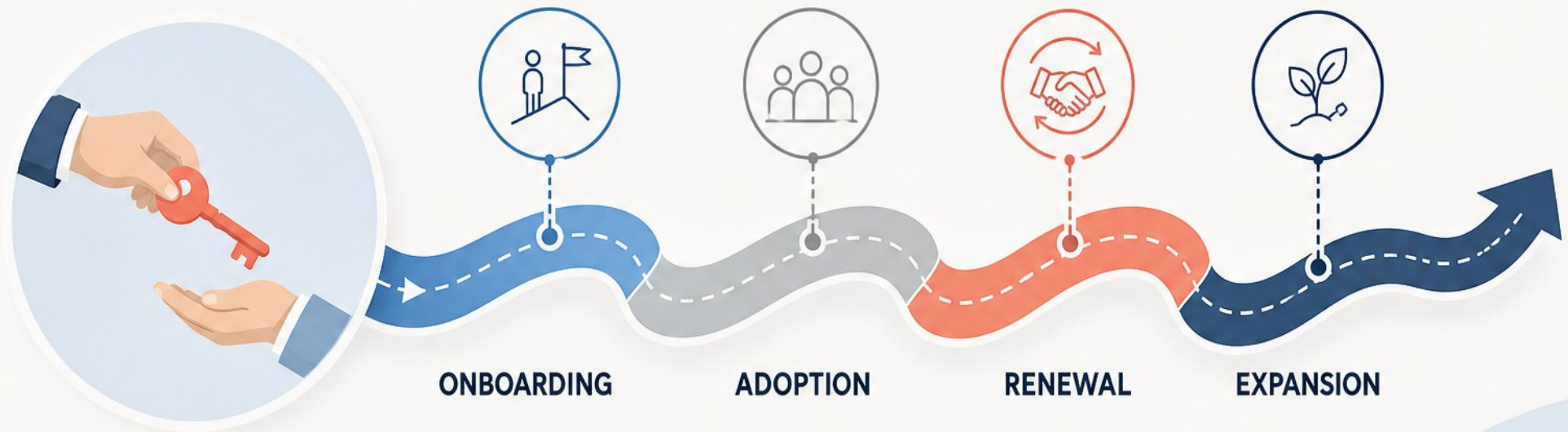
- AI as accelerator for research, insight generation, not just tasks



- Vertical specialization and data-driven storytelling are key



The Customer Lifecycle: Orchestrating the Post-Sale Journey



- Map the journey: onboarding, adoption, renewal, and expansion stages



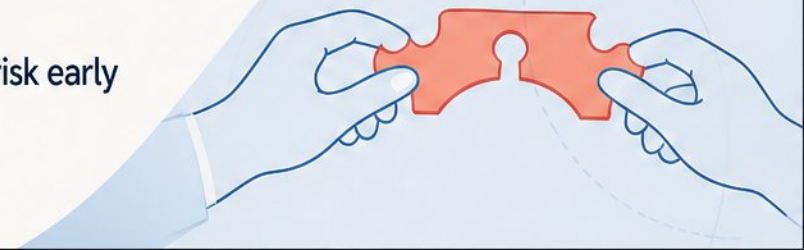
- Perfect the Sales-to-CSM handoff with a value-focused transition



- Design onboarding around milestones to accelerate Time-to-First-Value (TTFV)



- Monitor product telemetry and adoption signals to detect churn risk early



Managing Customer Health: Data-Driven Risk Detection



- Lead with adoption depth and engagement, not churn lag indicators



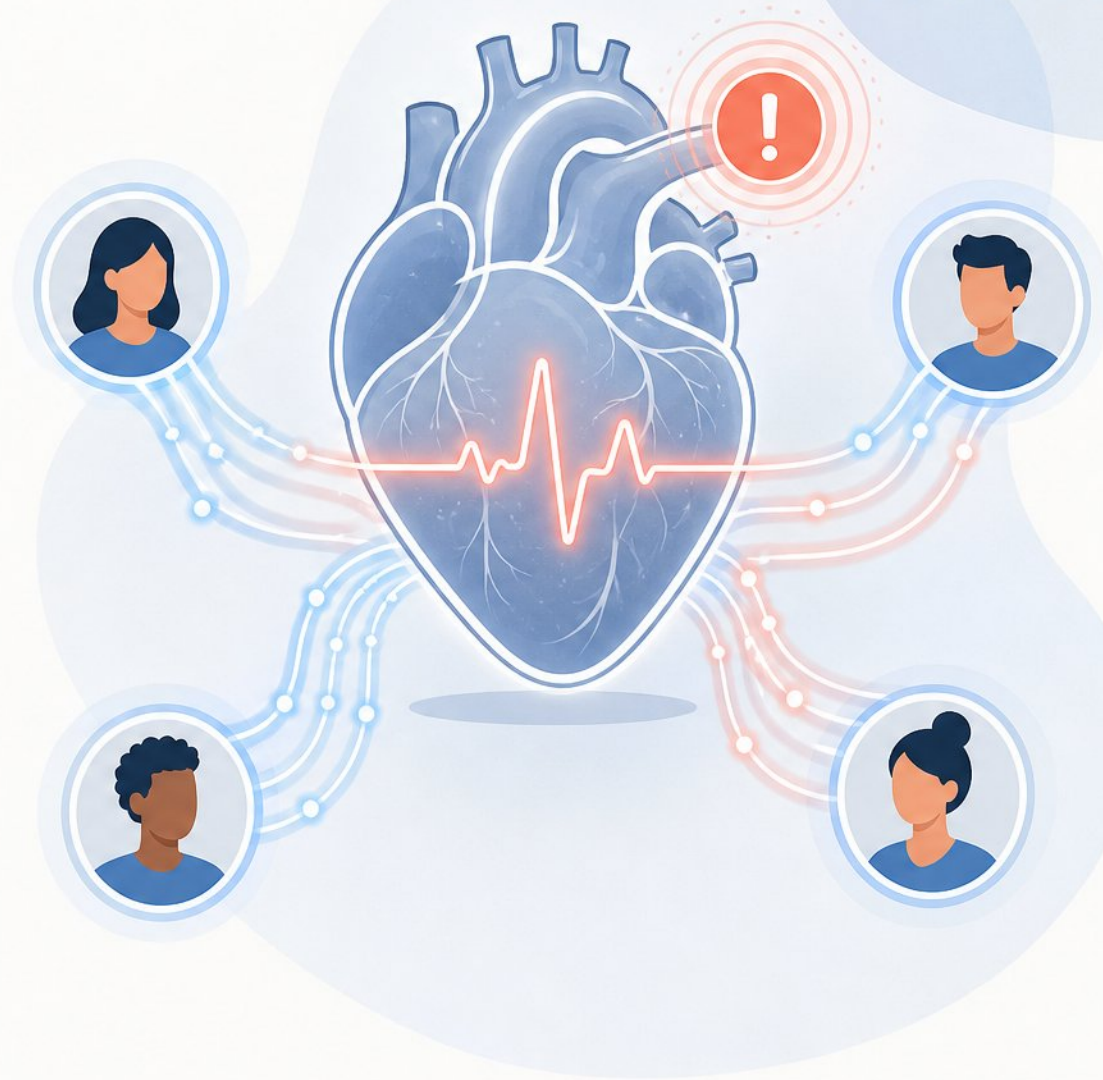
- Health Score = usage telemetry + support tickets + financial signals



- Build proactive playbooks triggered by health score thresholds

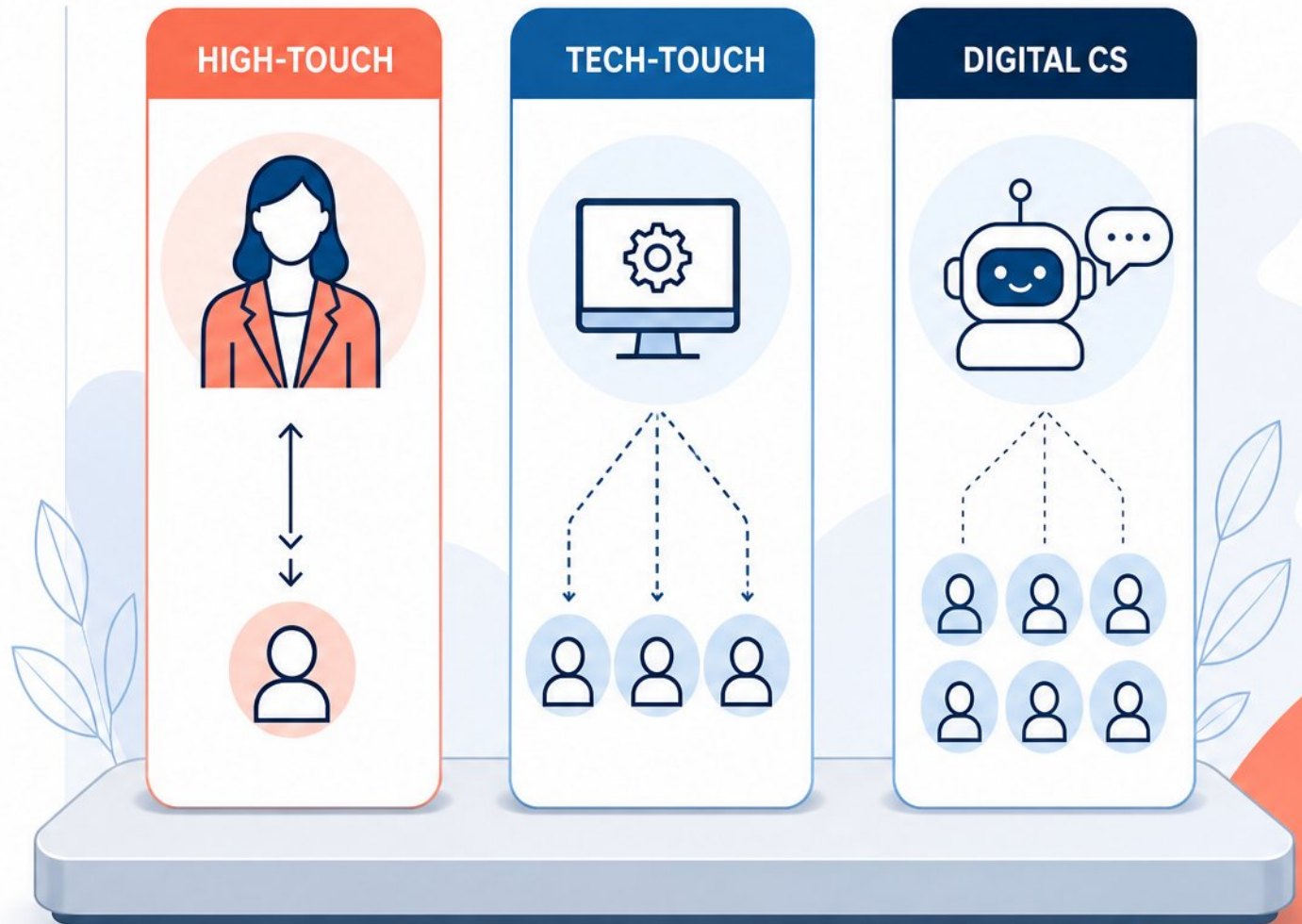


- Frame declining engagement talks around value, not blame



Engagement Models: High-Touch, Tech-Touch, and Digital CS

- Segment accounts by ACV, potential, and risk to pick the right model.
- High-touch: dedicated strategic advisory for enterprise accounts.
- Tech-touch: automated, one-to-many engagement for SMB scale.
- Digital CS: AI and in-app guidance drive outcomes without human intervention.
- Balance proactive strategic outreach with reactive support requests.



Executive Business Reviews (QBRs) That Drive Decisions



- A strategic QBR proves ROI and plans the future; a status meeting reviews past activity.



- Best-practice agenda: value delivered, roadmap alignment, commercial outlook, risk review.



- Send materials 48 hours ahead; secure the executive sponsor in writing.



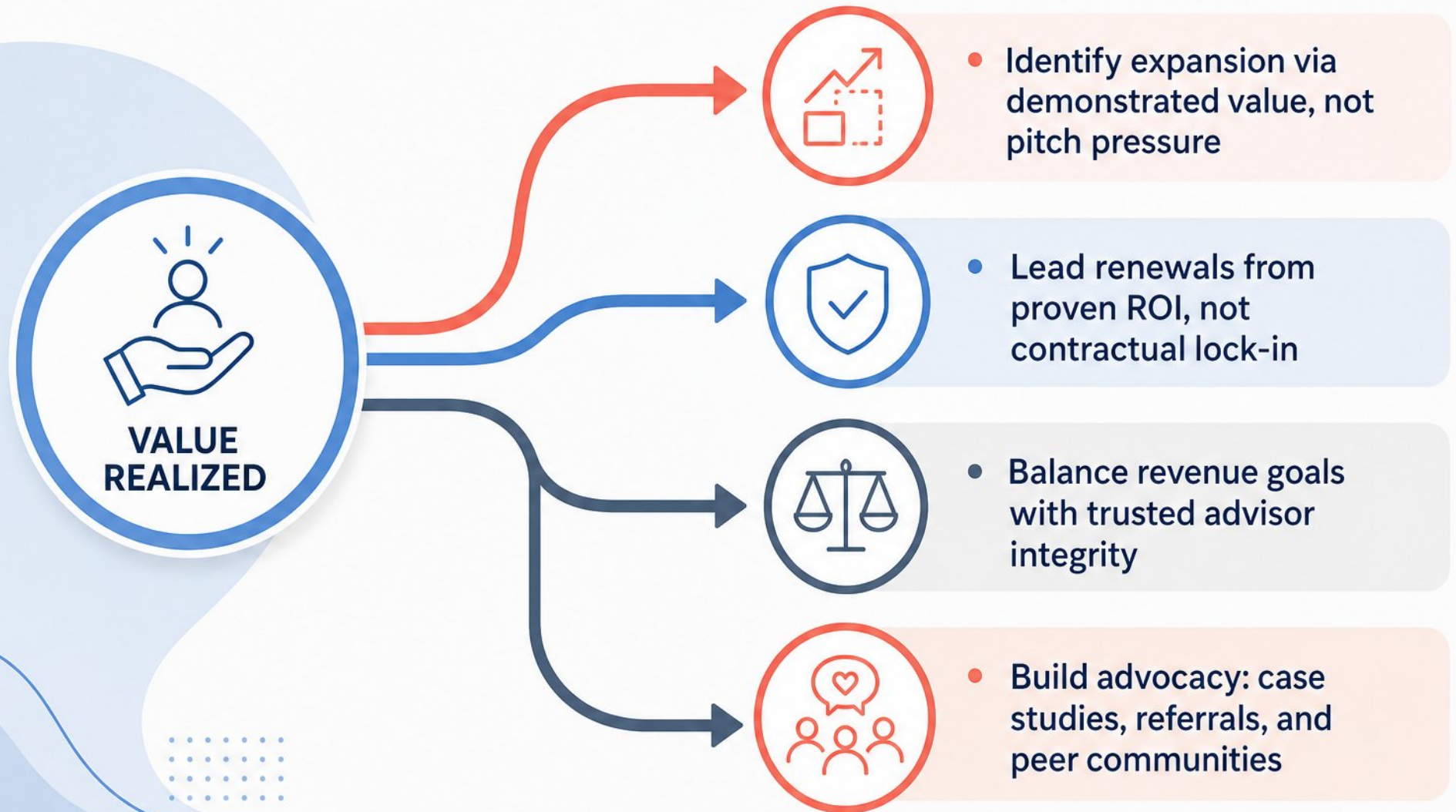
- Close with a slide of mutual commitments: named owners, dates, and decisions.



- Cadence: quarterly for enterprise and mid-market; annual ABR for SMB.



Driving Expansion, Renewals, and Building Advocacy



The 2026 CS Tech Stack: CSPs, AI, and Automation

- Core platforms: CSP, CRM, product analytics, and AI agents
- Leaders: Gainsight (enterprise), ChurnZero (mid-market), Planhat (Europe)
- CSMs centralize product telemetry and health scores in the CSP
- AI agents autonomously score health and draft 80%-complete QBR decks
- Select tools by team size: modular for small teams, bundled for enterprise



CSM Career Paths: Role Evolution and Specializations



- **Entry paths:**

Support, Sales, Onboarding, Implementation, Domain Expertise, or Direct Entry



- **Progression:**

Associate → CSM → Senior/Enterprise → Team Lead → Director → VP/CCO



- **Emerging specializations:**

Digital CS, CS Operations, Renewal Manager, Strategic/Enterprise CSM



- **2026 differentiator:**

Commercial, data, and AI fluency are now required at every level



Compensation, Certifications, and Continuous Learning



- Mid-level CSM OTE \$75K–\$140K; Enterprise CSMs reach \$175K–\$225K+ with accelerators.



- Pay drivers: ARR stage, ACV, geo, and new AI/technical experience premiums of 10–20%.



- Key certs: SuccessCOACHING, CCSM, Pulse+, and Gainsight/ChurnZero credentials.



- Build daily practice through CS communities, influential voices, and hands-on AI tool use.



Your Career Transition: A Self-Assessment



- Audit your current skills against the 2026 CSM archetype



- Map transferable strengths from sales, support, or consulting roles



- Pinpoint your biggest gaps and natural strengths



- Define your ideal target: industry, company size, engagement model

	CURRENT SKILLS	TRANSFERABLE STRENGTHS	GAPS & NATURAL STRENGTHS
			
			
			
			
			

Building Your CS Portfolio and Narrative



- Craft a results-focused résumé showcasing customer outcomes, not roles.



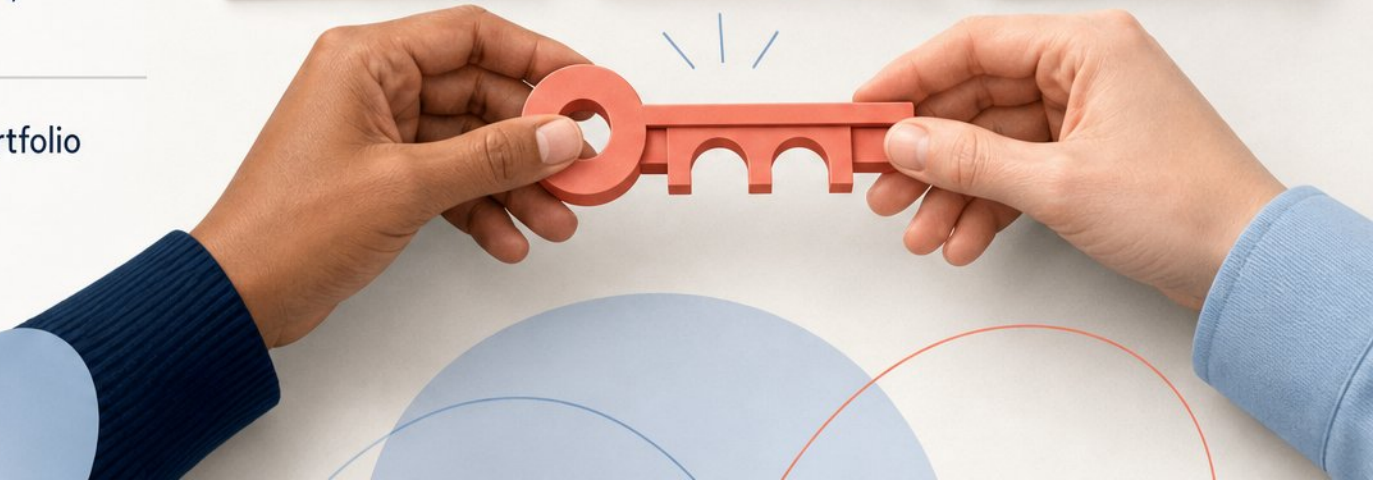
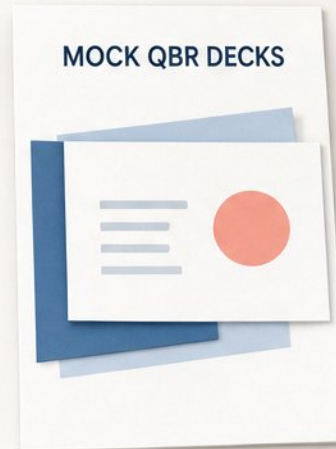
- Build a portfolio: mock QBR decks, health score analyses, and onboarding plans.



- Translate past wins into CS language: “I solved X, resulting in Y value.”



- Use AI to accelerate portfolio creation, research, and personal upskilling.



Your 90-Day Plan to Launch a CS Career



- Month 1: Build knowledge, earn a certification, and start networking with peers.



- Month 2: Create a portfolio with mock QBRs, health scores, and onboarding plans.



- Month 3: Apply to target roles, practice interviews, and secure a mentor.



- Download the final checklist and curated resource list for continuous growth.

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