

Customer Success Software:

Selection, Requirements, and Workflow



NRR compressed to ~101–102% median: retention now carries the growth story



Scope: select a CS platform, prioritize requirements, design post-sale workflows



One decision, six owners: CS, CS Ops, RevOps, IT, Procurement, SaaS product



Category consolidating; AI agents now table stakes, not differentiator



Target: clean data foundation, one platform strategy, no tool sprawl



Outputs: shortlist, requirements matrix, workflow blueprint, phased roadmap



The Retention Economics That Justify the Investment

NRR, GRR, and the ROI case for CS software



Core metrics: NRR, GRR, logo retention, expansion ARR share, CLV, CAC payback



Median NRR ~101–102%; GRR 84–91%; top-quartile NRR 110–125%



NRR–GRR gap: 15–25 points healthy; 30+ means expansion masks churn



Sales-led GRR ~8–9 points above product-led; high-touch retains better



ROI model: conservative NRR lift + admin time saved + lower cost-to-serve



CS Operations, RevOps, and Who Owns What



CS Ops runs the post-sale operating layer: lifecycle, health scoring, renewal, reporting



RevOps aligns the full revenue motion across marketing, sales, and CS



Shared ground: data quality, forecasting, lifecycle definitions, process design



Reporting models: centralized under RevOps, embedded under VP of CS, or hybrid



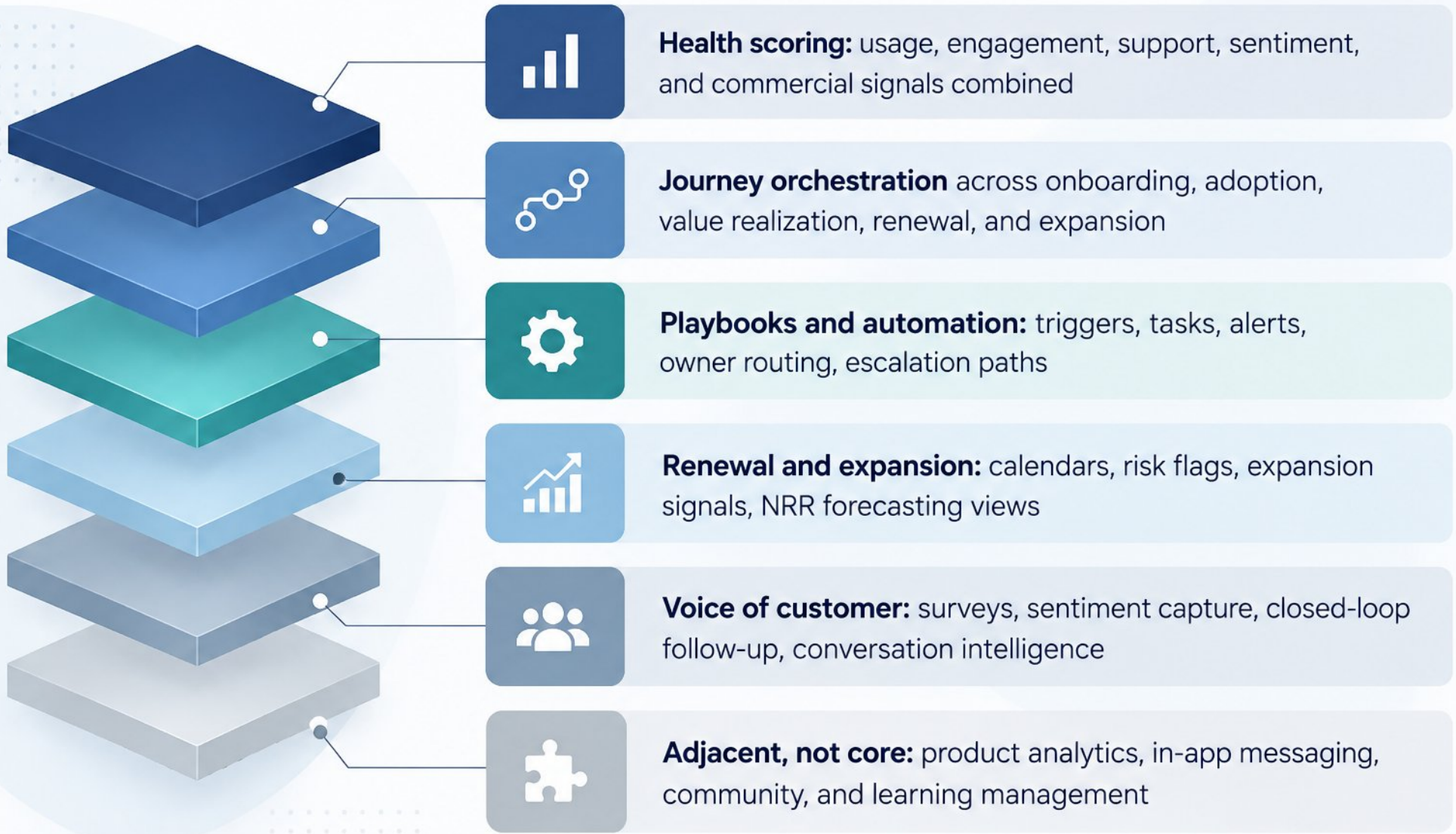
Dedicated CS Ops signal: 10+ CSMs, complex lifecycles, expansion above 20% of revenue



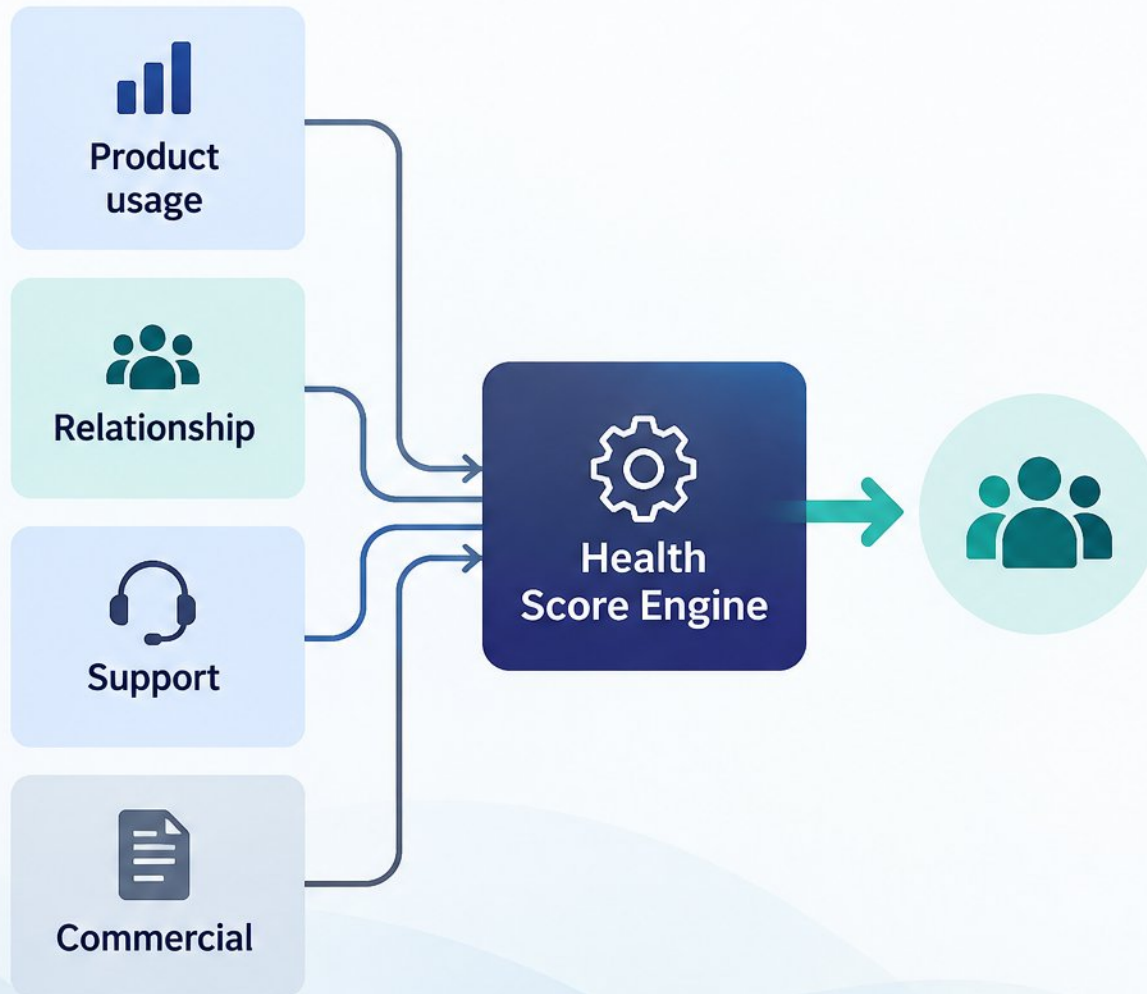
Name one platform owner; CS Ops holds configuration and data governance



Core Capability Map: What a CS Platform Actually Does



Health Scoring and the Data Foundation It Requires



1

Start with 5–7 trusted inputs; add complexity after one validated quarter

2

Weighted example: product usage 35%, relationship 25%, support 20%, commercial 20%

3

Build separate score profiles by segment, plan tier, and lifecycle stage

4

Let CSM judgment override the model when qualitative context contradicts it

5

Back-test against accounts that actually churned, renewed, or expanded

6

Clean account identities across telemetry, CRM, support, and billing come first

From Business Outcomes to a Requirements Matrix



Capture requirements before any vendor conversation begins



Write each workflow as trigger, owner, data, action, failure point



Classify: must-have for 90 days, nice-to-have, or not needed



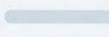
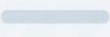
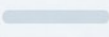
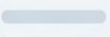
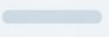
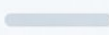
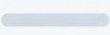
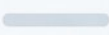
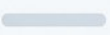
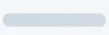
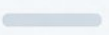
Document data sources, quality thresholds, refresh frequency, and owners



Use MoSCoW and weighted scoring with written rationale



Make integration, security, scalability pass/fail knockouts

 Business Outcomes	 Workflow	 Data Needs	 Priority (MoSCoW)	 Integration	 Security	 Scalability
						
						
						
						

Market Landscape: Vendor Segments and Positioning



Enterprise

Gainsight leads on workflow depth; 12–24 week implementations, dedicated admin needed



Mid-market

ChurnZero and Vitally win on speed; 4–8 week deployments



European/ configurable

Planhat offers flexible data model and unlimited-user pricing



Modular/ lightweight

Totango SuccessBLOCs; Custify and ClientSuccess for smaller teams



CRM-bundled

HubSpot and Salesforce remove integration work but trail orchestration depth



Consolidation is narrowing the field; score AI on results with your data today, not roadmap



Weighted Scorecards, Demos, and Proof-of-Concept Design



Score every finalist on the same weighted criteria



Lead with CRM integration depth, CSM workflow fit, health configurability



Demand evidence: sandbox sync demo, real scoring model, sized reference admin



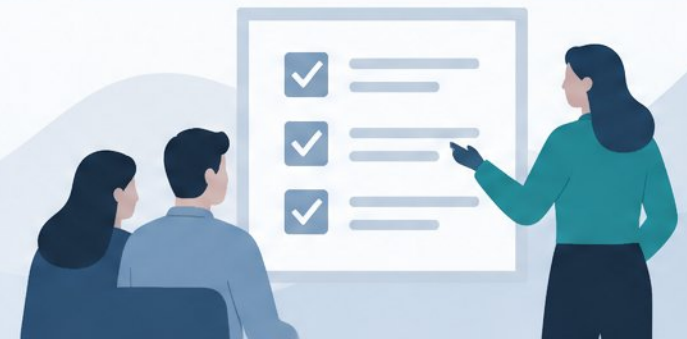
Run identical three-week trials on the same scenario set



Scenario set: stalled onboarding, renewal at risk, usage down, escalations



Red flags: rigid scoring, thin APIs, vague sync accountability



Total Cost of Ownership and Commercial Terms

- Custom quotes dominate; similar deployments vary 50–200%
- Mid-market: \$15K–\$90K/year; enterprise above \$100K
- Implementation adds 20–40% of year-one subscription
- Budget admin headcount, modules, AI layers, premium support
- Seat vs. account vs. unlimited-user pricing compounds at scale
- Negotiate multi-year terms and a written renewal uplift cap
- Compare total first-year cost, not subscription price



Workflow Design and Operating Model



Map lifecycle to coverage motions:
high-touch, hybrid, tech-touch



Every playbook: trigger, owner,
sequenced steps, completion criteria,
inspection signal



Write triggers as measurable
conditions — source system,
threshold, refresh interval



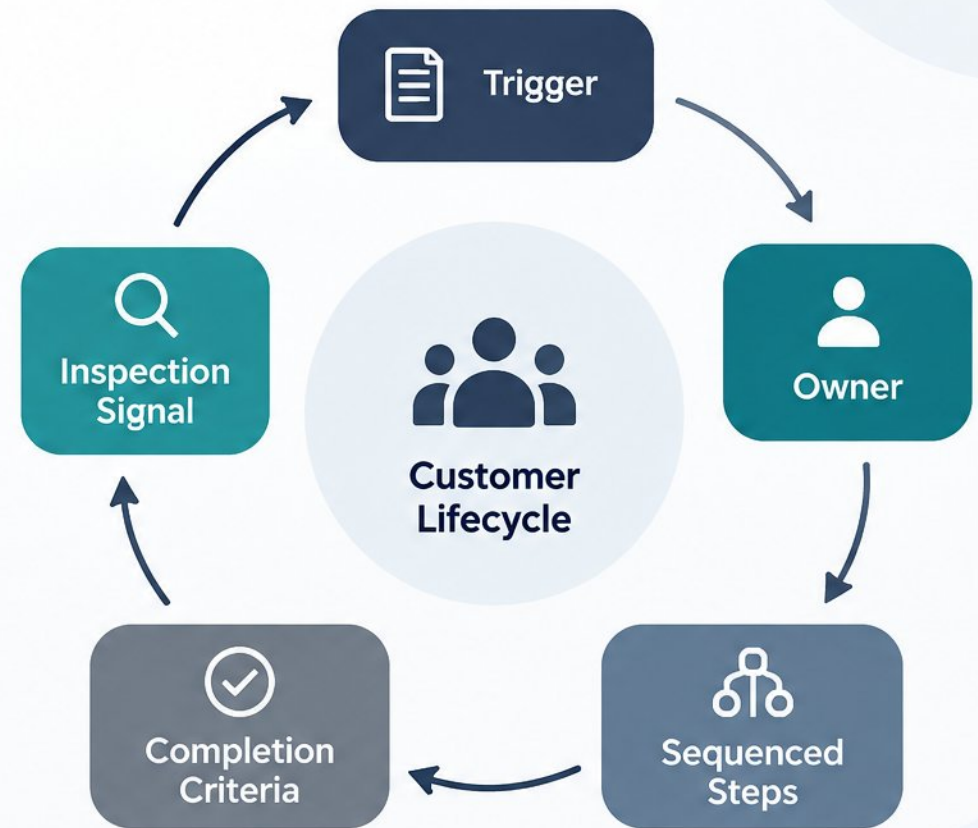
Attach a channel and response target
to each step; name the clock



Start with three plays: onboarding,
at-risk, renewal



Named owners and backups; automate
around the conversation, never the
renewal itself



Three Plays to Start



onboarding

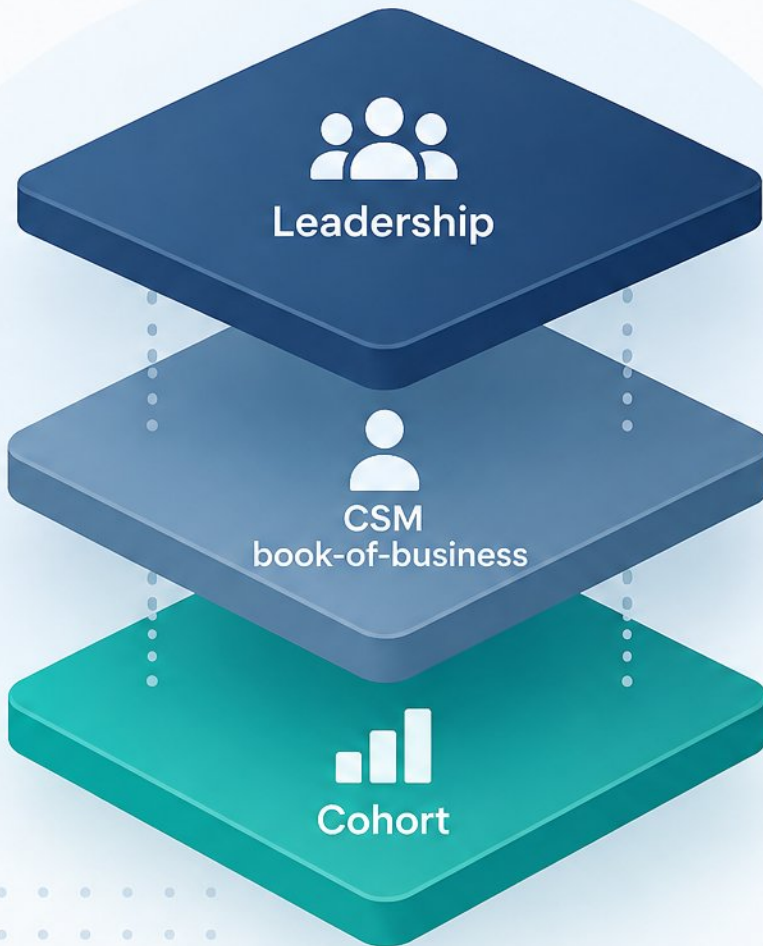


at-risk



renewal

Metrics, Dashboards, and Operating Cadence



Three dashboard layers: leadership, CSM book-of-business, cohort



Define churn, contraction, expansion, renewal date, and at-risk once — with finance sign-off



Weekly leading indicators: health score moves, onboarding velocity, renewal coverage, stale accounts



Monthly and quarterly lagging views: NRR, GRR, expansion ARR, churn drivers by lost ARR



Operational checks: health score coverage, playbook execution rate, data freshness



Every metric needs a named owner, a benchmark, and a triggered action

Implementation Roadmap and Sequencing



Build downward: data foundation, triggers, workflows, then qualitative and AI layers



Data migration is the longest task—start source inventory in week one



Pilot on a small account set with pre-agreed success criteria



Handoff as a workflow with a minimum viable data set that blocks incomplete records



Timeline by tier: weeks, 4–8 weeks mid-market, 12–24 weeks enterprise



Reserve 20–30% of implementation budget for post-launch iteration

Change Management, Enablement, and Adoption



Name one accountable owner with authority — not a committee



Role-based training on real workflows and real account data



Plan for resistance: spreadsheet reversion, distrust, manager non-reinforcement



Decommission the old workflow — leaving spreadsheets alive stalls the platform



Track behaviors, not logins: activity capture, field completeness, dashboard use



Run 30/60/90-day adoption checkpoints and act on the data



Procurement, Security, and Vendor Management

-  Tier vendors by data sensitivity, system access, and business criticality
-  Security gate as pass/fail: SOC 2 Type II, ISO 27001, SSO/SAML, MFA, RBAC, audit logs
-  Data commitments: signed DPA, residency terms, deletion, and AI training opt-out
-  Subprocessor disclosure and breach notification timelines written into the contract
-  Contract risk: auto-renewal windows, price escalation, liability caps, data exit path
-  Vendor governance: quarterly reviews, roadmap influence, re-validation before renewal
-  Measure whether added best-of-breed tools actually move retention



90-Day Action Plan and Executive Readiness



- One 90-day plan consolidating selection, requirements, and workflow design



- Five artifacts: requirements matrix, weighted scorecard, workflow blueprint, ROI model, roadmap



- Role next steps: CS leaders, CS Ops, RevOps, IT and Procurement each own a deliverable



- One-page exec summary: the problem in a number, fully loaded cost, named adoption risk



- Stand up governance now: named platform owner, weekly cadence, quarterly review



- Later: revisit pricing, AI capability, and vendor stability — lock in 30-day commitments

ALIGN
BUILD
EXECUTE
DRIVE READINESS



PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/8df96a25/public