

Introduction to Customer Success Fundamentals



- CS: proactive, strategic function for measurable customer outcomes



- Drives retention, NRR, expansion in recurring-revenue models



- Audience: CS beginners, account teams, support leads, SaaS teams



- Mindset shift: reactive support → proactive value & trusted advisory



- Takeaway: frameworks, metrics, playbooks for immediate use



The SaaS Business Case for Customer Success



- **Recurring revenue economics:** churn erodes growth; retention is more capital-efficient than acquisition.



- **Core metrics:** Net Revenue Retention (NRR), Gross Revenue Retention (GRR), logo churn, expansion ARR.



- **2025 benchmarks:** median NRR ~102–106%; top quartile 110–120%+; median GRR ~84–91%.



- **Structural drivers:** pricing model (usage-based vs. seat-based), ACV segment, and ARR stage.



- **CS as a revenue engine:** strong NRR and GRR create capital-efficient growth and higher valuation multiples.



How Customer Success Differs from Sales, Support, and Account Management

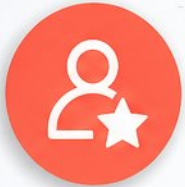


- ✓ CS: Proactive value delivery; Sales: Acquisition; Support: Reactive issue resolution
- ✓ CSM is a 'value manager' owning time-to-value, adoption, and health
- ✓ Traditional AM manages relationships; CS owns measurable customer outcomes
- ✓ Structured handoffs enable CS and Sales to collaborate on renewals and expansion

The Customer Lifecycle and Moments of Truth



- Map the LAER journey: Land, Adopt, Expand, Renew, and the AI-era DARE model



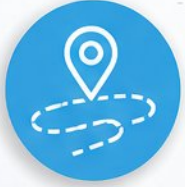
- Critical moments of truth: onboarding, first value milestone, renewal trigger, silent churn signals



- Define leading/lagging indicators: time-to-onboard, activation rate, NPS, usage breadth



- Shift from supplier-centric view to customer's business outcomes and decision rhythms



- Use journey mapping and milestone-based success planning for proactive engagement



Jobs to Be Done and Value Framing



- Look beyond feature usage to the functional, emotional, and social jobs customers hire your product to do



- Capture desired outcomes through voice-of-customer interviews, onboarding discovery, and QBR questioning



- Connect product adoption metrics to the customer's own business KPIs and strategic goals



- Use value-discovery questions like "When did this last save you a full day of work?"



Health Scoring and Risk Signal Detection



- Health is a composite of adoption, sentiment, and commercial signals



- Design a pragmatic score: depth, breadth, stickiness, NPS, engagement



- Early warnings: silent champions, login decline, missing exec sponsors



- Set cadences: weekly at-risk reviews, monthly portfolio health analysis



- Risk playbook stages: monitor, investigate, intervene, escalate



Segmentation and Engagement Models



- One-size-fits-all engagement fails—segmentation enables scalable, high-impact CS.



- Segment by ARR, growth potential, complexity, strategic value, and risk profile.



- Tiers: High-Touch, Tech-Touch/Low-Touch, and Digital/Community with tailored playbooks.



- Tailor communication cadences: EBRs, webinars, automated in-app guidance, sentiment check-ins.



- Shift toward digital-first, AI-augmented engagement—even for enterprise accounts.



Proactive Communication and the **Trusted Advisor Posture**



Outcome-obsessed advisor,
not a support responder or
just a friend



Frame every message around
customer goals, not
product updates



Anchor in delivered value,
then surface the
next challenge



Balance scheduled touchpoints
with event-driven, data-
triggered interventions



Expansion: CS-Led Growth Without Becoming Sales



- Expansion is surfacing needs and framing outcomes; upselling is pitching and closing—keep them separate



- Score signals: usage thresholds (3 pts), new use cases (2), stakeholder changes (2), adjacent team requests (2), contract timing (1)



- Use Open → Mirror → Constraint → Unlock → Next Step: a customer-led conversation script without a sales pitch



- Hand off with a one-page brief: signal evidence, customer language, commercial range, CSM's continued role



- Track CS-sourced pipeline, close rates, NRR contribution, and post-conversation trust scores



The Renewal Process: Zero Surprises, Full Evidence



- Build a 120-90-60-30 day proactive renewal timeline with risk flags



- Assemble an evidence file: ROI proof, outcome stories, usage trends



- Separate renewal from expansion; sequence conversations correctly



- Handle objections (budget, competition) using value proof and exec alignment



- Coordinate CS, Sales, and leadership to avoid last-minute discounting



Building Customer Advocacy



- Convert loyal users into advocates via referrals, case studies, and community



- Identify advocacy signals: strong health scores, vocal champions, measurable ROI



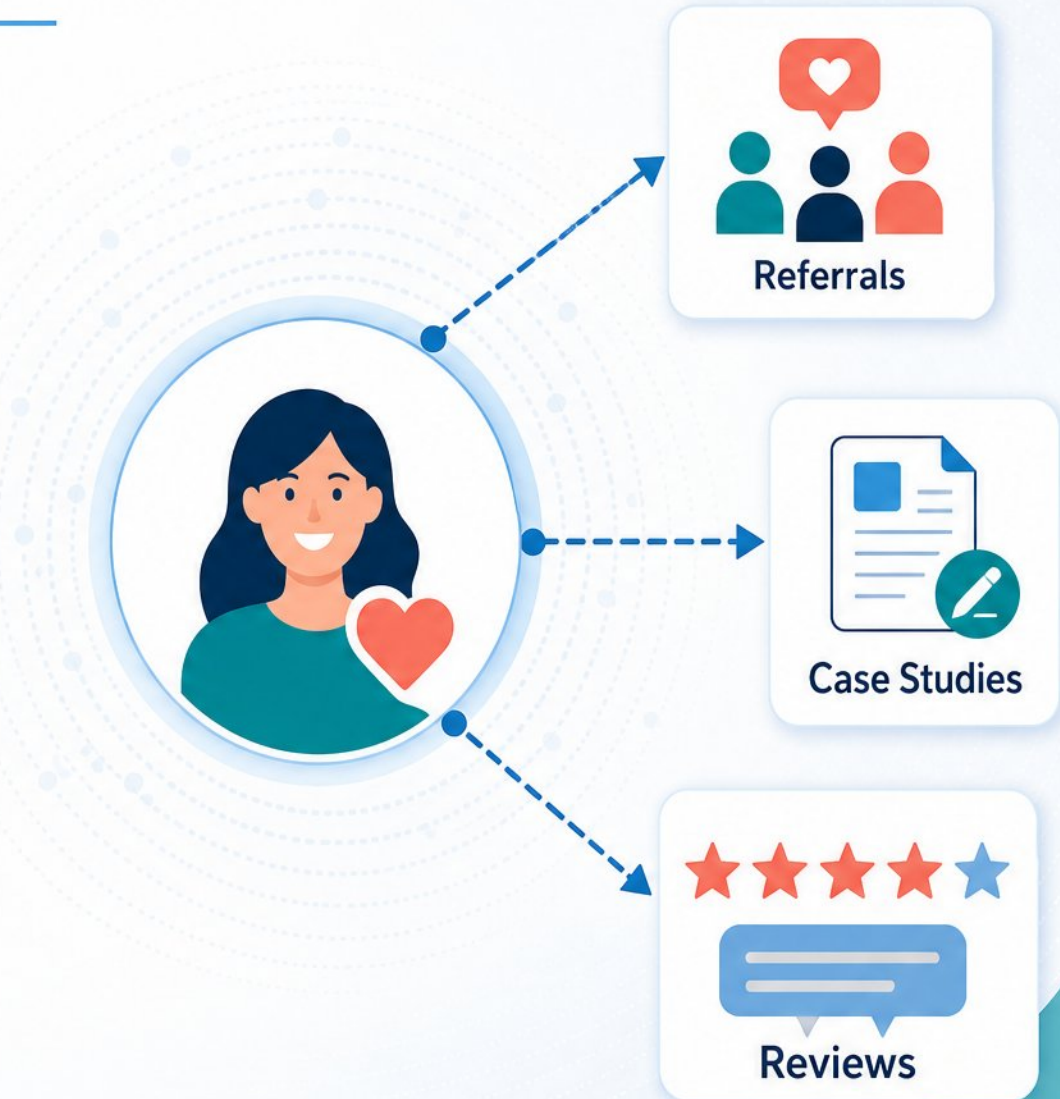
- Scale programs with CABs, reference pools, review campaigns, and user groups



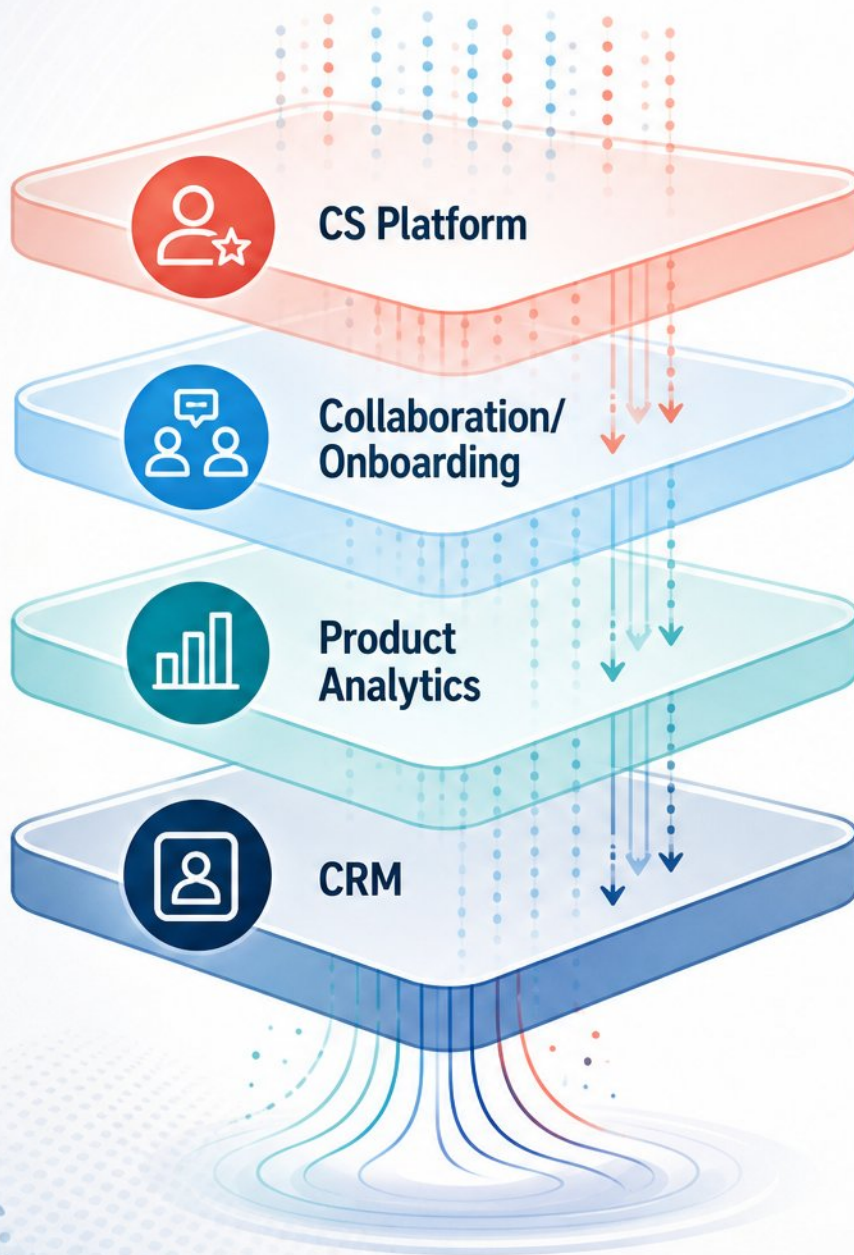
- Track impact: lower CAC, faster sales cycles, and improved NRR



- Close the loop: feed advocate insights on product and pricing back to internal teams



The Customer Success Tech Stack and Data Foundation



Four essential layers: CS Platform, Collaboration/Onboarding, Product Analytics, CRM



CS Platforms (Gainsight, Planhat, ChurnZero) power health scores and playbooks



Collaboration layer (Valuecase) is the shared workspace for doing work with customers

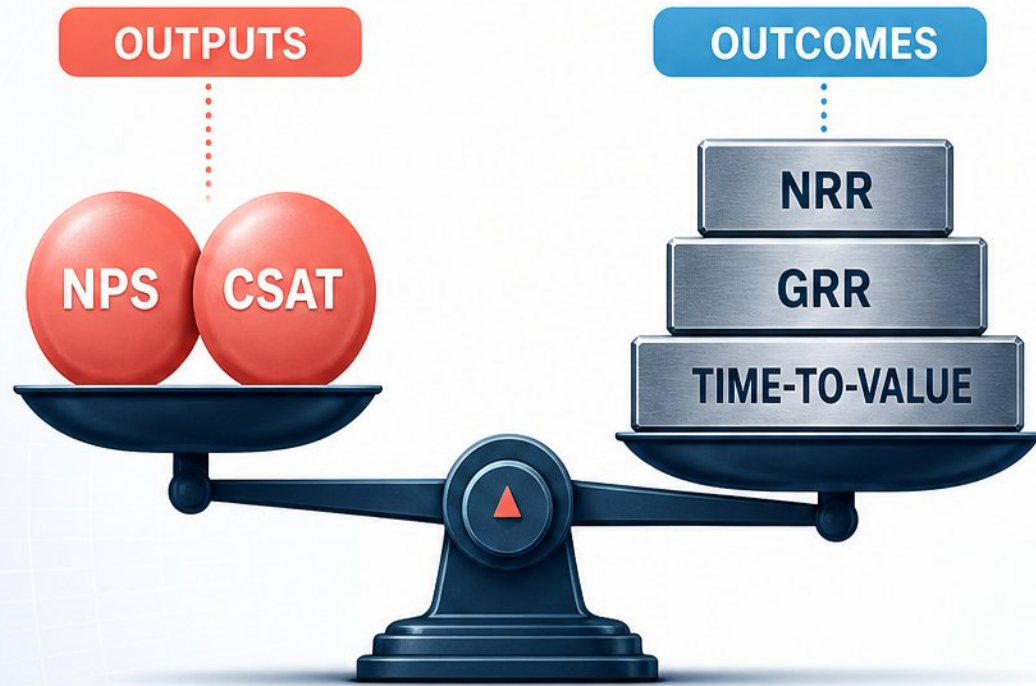


Siloed data breaks AI predictions, health scores, and automated triggers



2026 trend: CS Ops leads AI orchestration; tool consolidation accelerates

Metrics That Matter and How to Influence Them



- NPS and CSAT are outputs; NRR, GRR, and logo retention are outcomes.



- NRR includes expansion (median ~106%); GRR excludes it (median ~84-91%).



- Leading activities (onboarding completion, QBR cadence) drive lagging revenue results.



- Build a one-page CS dashboard: segment-specific trends, health accuracy, and action items.



- Avoid blended medians, mistaking NRR for GRR health, and measuring activity over outcome quality.

SEGMENT-SPECIFIC TRENDS



HEALTH ACCURACY



ACTION ITEMS

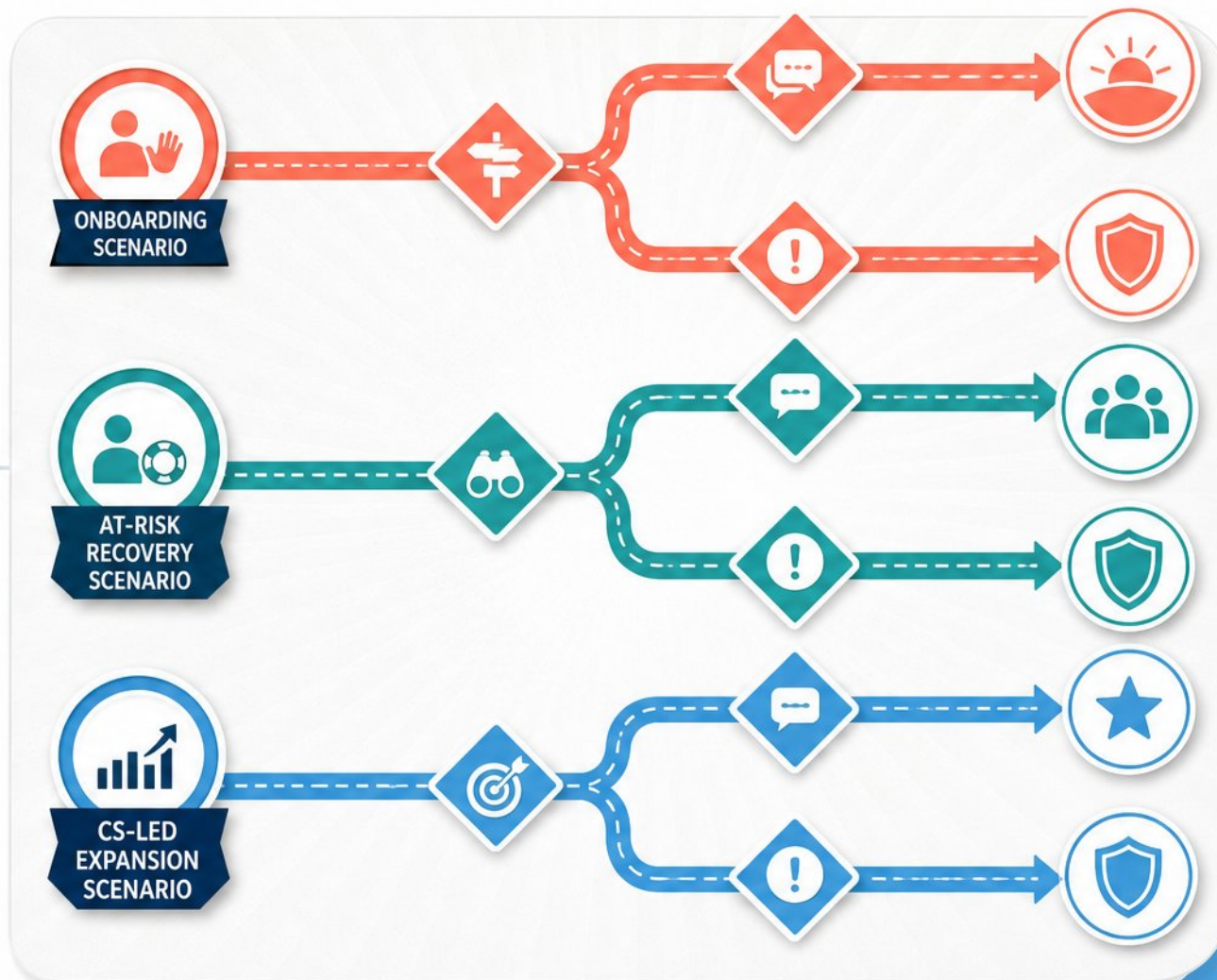


FOCUS TO OUTCOMES



Practical Playbooks and Real-World Scenarios

- Walk through onboarding, at-risk recovery, and CS-led expansion scenarios
- Apply health scores, engagement tiers, and value-framing scripts
- Avoid pitching expansion before value; don't ignore silent churn signals
- Use a reusable decision-tree playbook template for your own accounts
- Practice expansion conversations, QBR agendas, and risk escalation emails



Next Steps and Building Your Customer Success Practice



- Focus on outcomes, proactive cadence, and cross-team alignment



- Use a Crawl-Walk-Run model to self-assess your CS maturity



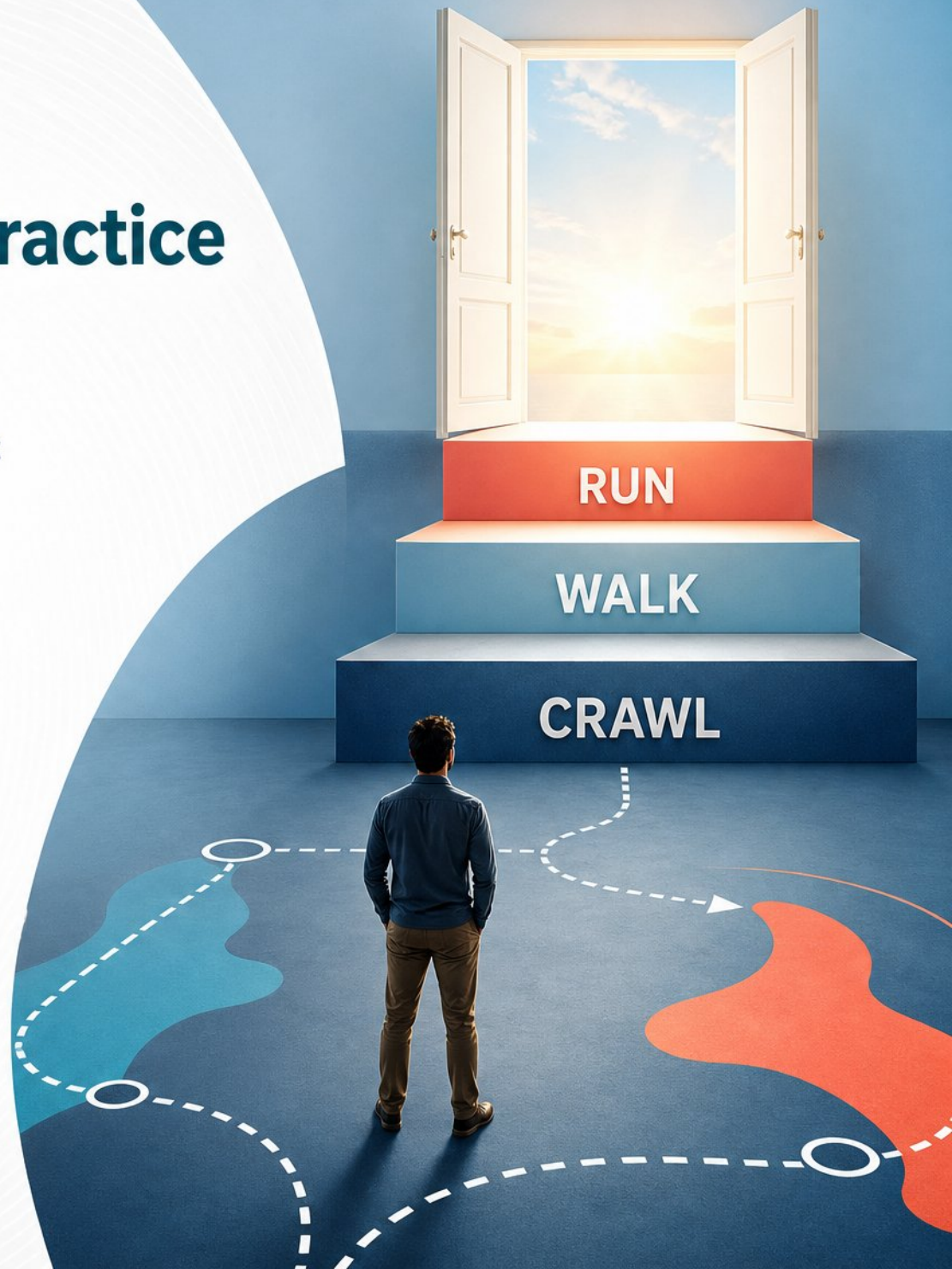
- Follow a 30-60-90 day plan: score health, run a QBR, document a playbook



- Tap key resources: Customer Success Collective, TSIA, Distilled CS



- Act now: identify one at-risk or expansion-ready account this week



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