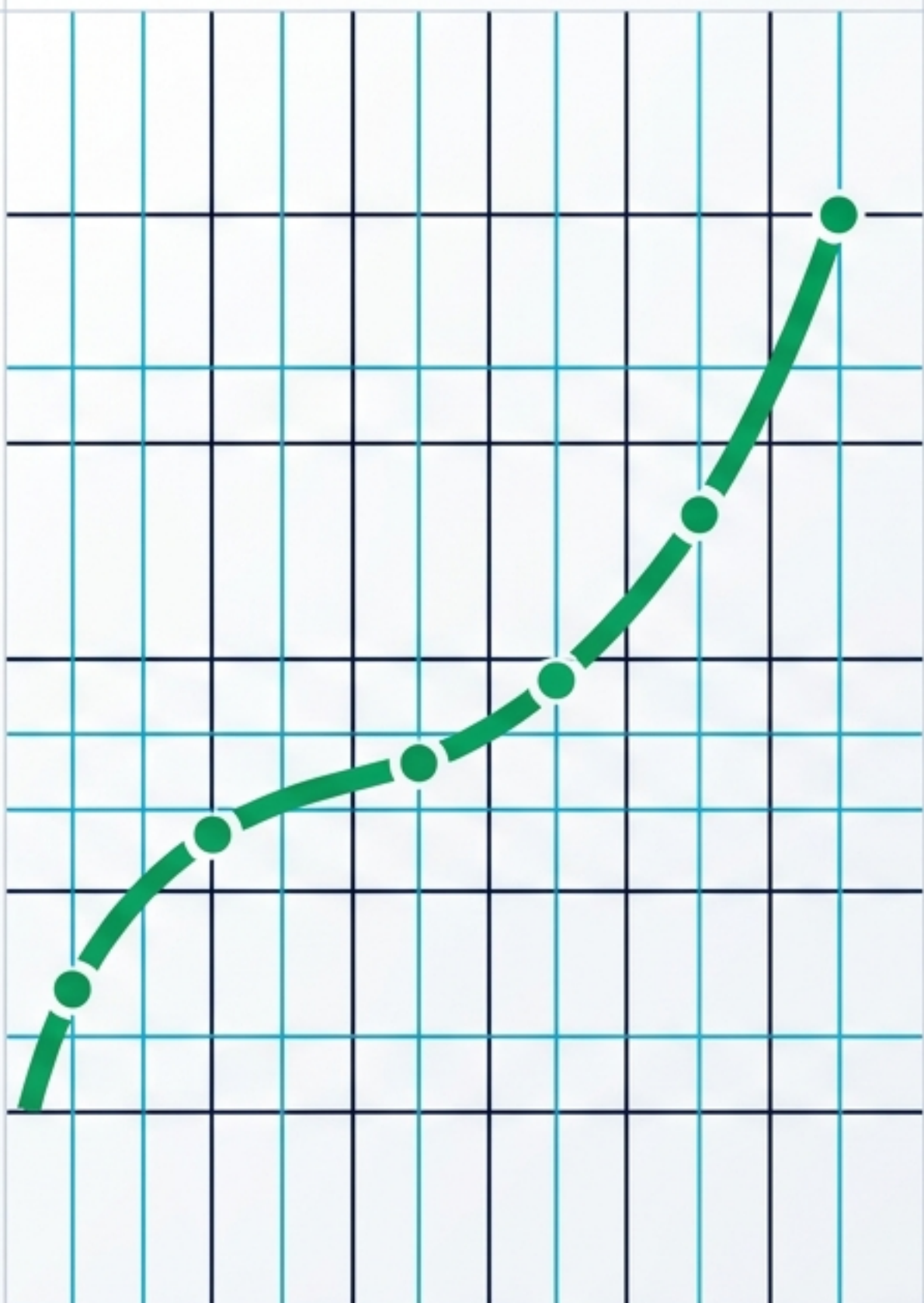




# Architecting Customer Success

## A Strategic Playbook for Selecting Tools and Scaling Retention



### Target Audience

Business Leaders, CS Executives, and RevOps Professionals.

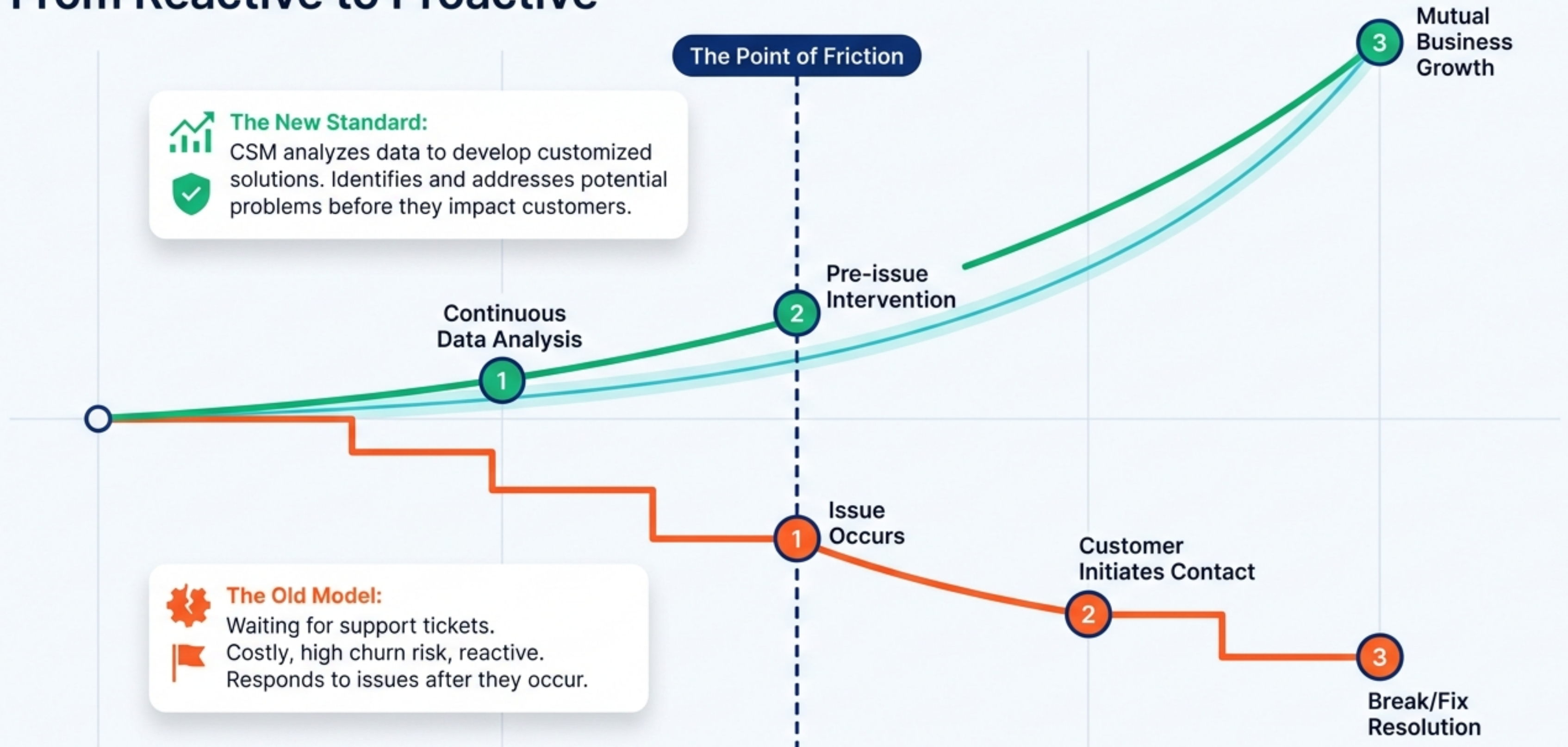


### Core Objective

Transition from reactive support to proactive, technology-driven customer success.

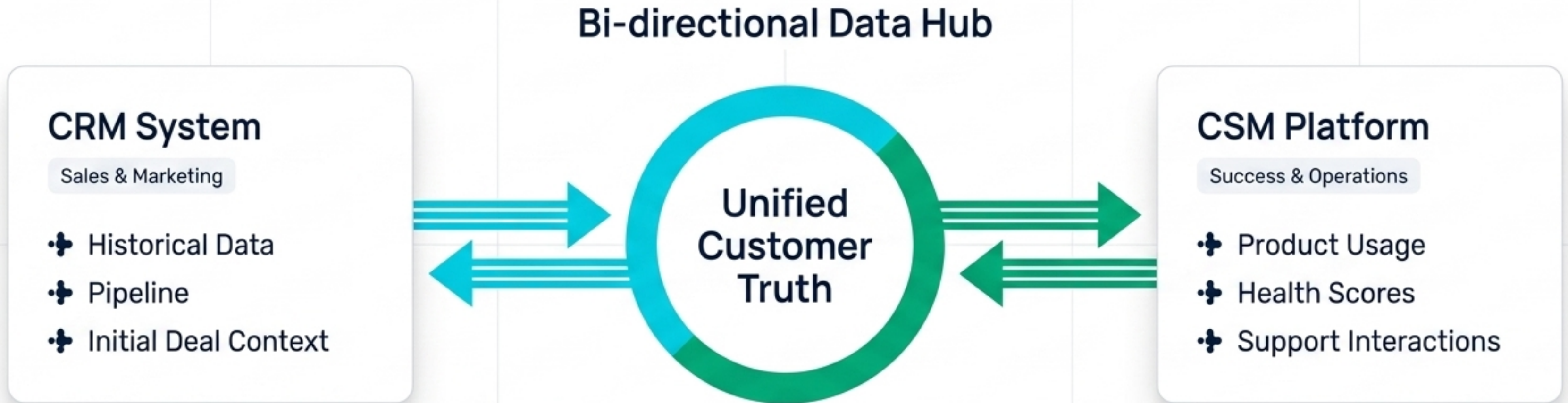


# The Paradigm Shift: From Reactive to Proactive





# The Architecture: Unifying Sales and Success

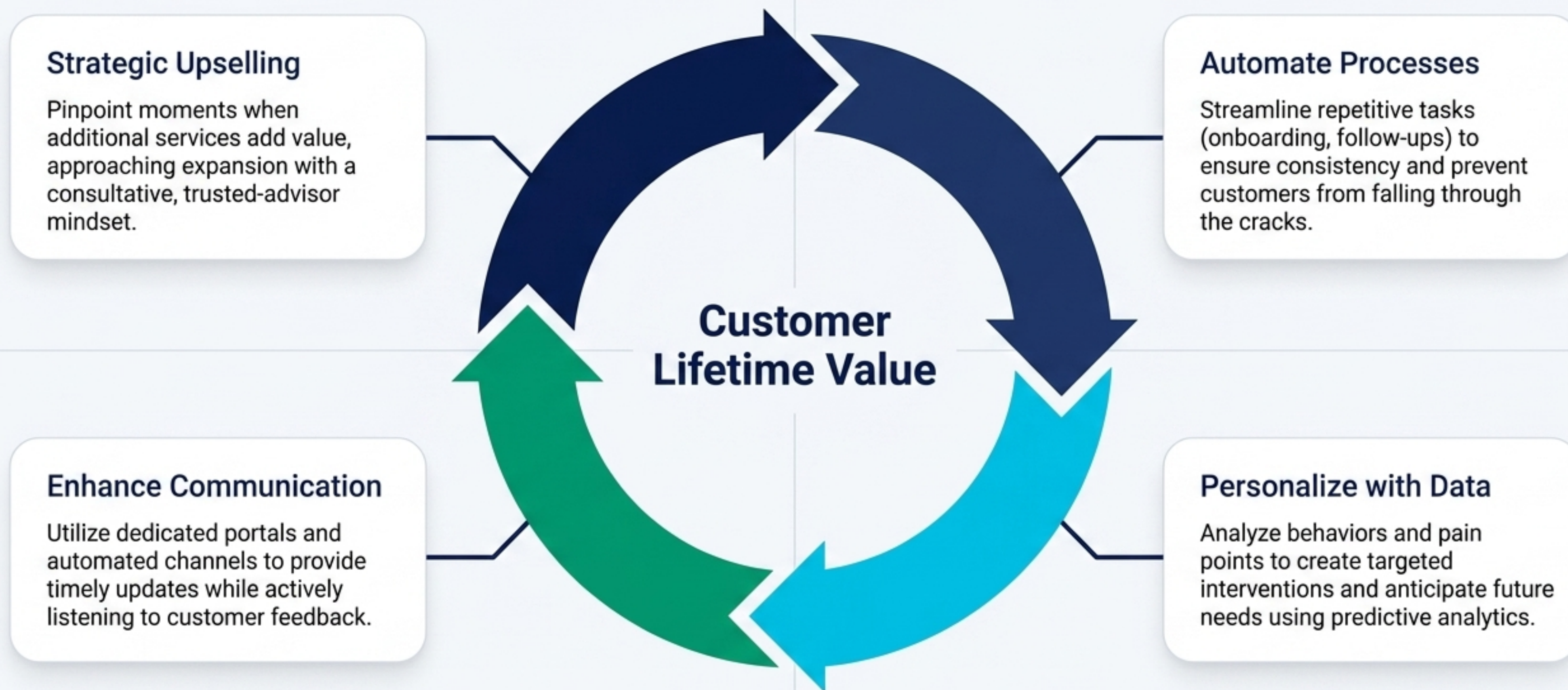


**Holistic Perspective:** Centralizing data provides a comprehensive view of each customer's journey, allowing tailored interactions based on individual behaviors.

**Operational Alignment:** Synchronizing data across platforms enhances communication between departments, ensuring Sales and Success are completely aligned.



# The CSM Engagement Flywheel





# Telemetry & Metrics: The Customer Health Score



## The Measurement Framework:

Establishing clear KPIs provides a framework for evaluating performance and identifying areas for improvement.

## Data-Driven Decisions:

Analyzing these indicators over time allows teams to identify trends, gauge customer sentiment, and refine success strategies.



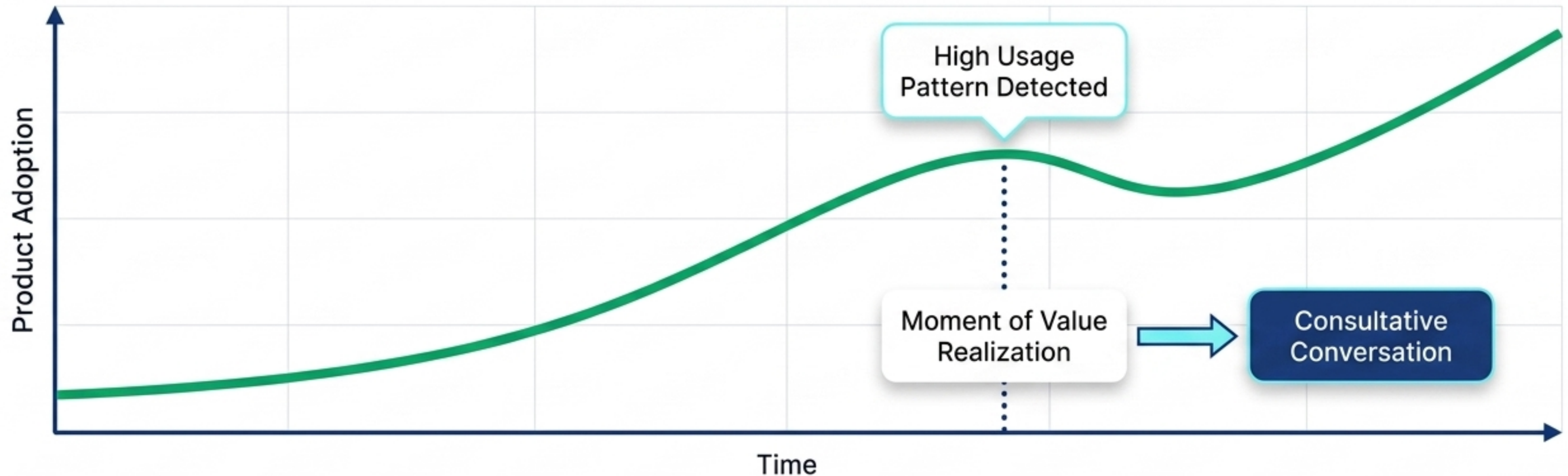
# The Diagnostic Matrix: Evaluating Top CSM Platforms

| Platform      | Key Features                                                  | Metrics Tracked                                | Integrations                        | User Rating |
|---------------|---------------------------------------------------------------|------------------------------------------------|-------------------------------------|-------------|
| Gainsight     | Customer health scoring, automated workflows, journey mapping | Churn rate, NPS, CLV                           | Salesforce, Zendesk, Slack, Teams   | ★★★★★ 4.5   |
| ChurnZero     | Health dashboards, in-app messaging, automated journeys       | Churn rate, upsell opps, CSAT                  | Salesforce, HubSpot, Zendesk, Slack | ★★★★★ 4.4   |
| Totango       | Customer segmentation, success playbooks, real-time alerts    | Engagement, renewal rates, product adoption    | Salesforce, HubSpot, Zendesk, Jira  | ★★★★★ 4.3   |
| ClientSuccess | Account management, renewal tracking, feedback collection     | Renewal rates, health score, expansion revenue | Salesforce, HubSpot, Slack          | ★★★★★ 4.2   |
| Planhat       | Customer data platform, automation, journey analytics         | Retention, product usage, NPS                  | Salesforce, HubSpot, Zendesk, Slack | ★★★★★ 4.1   |



# The Upsell Intervention Point

Customer Journey Line Chart



## Identifying Opportunities

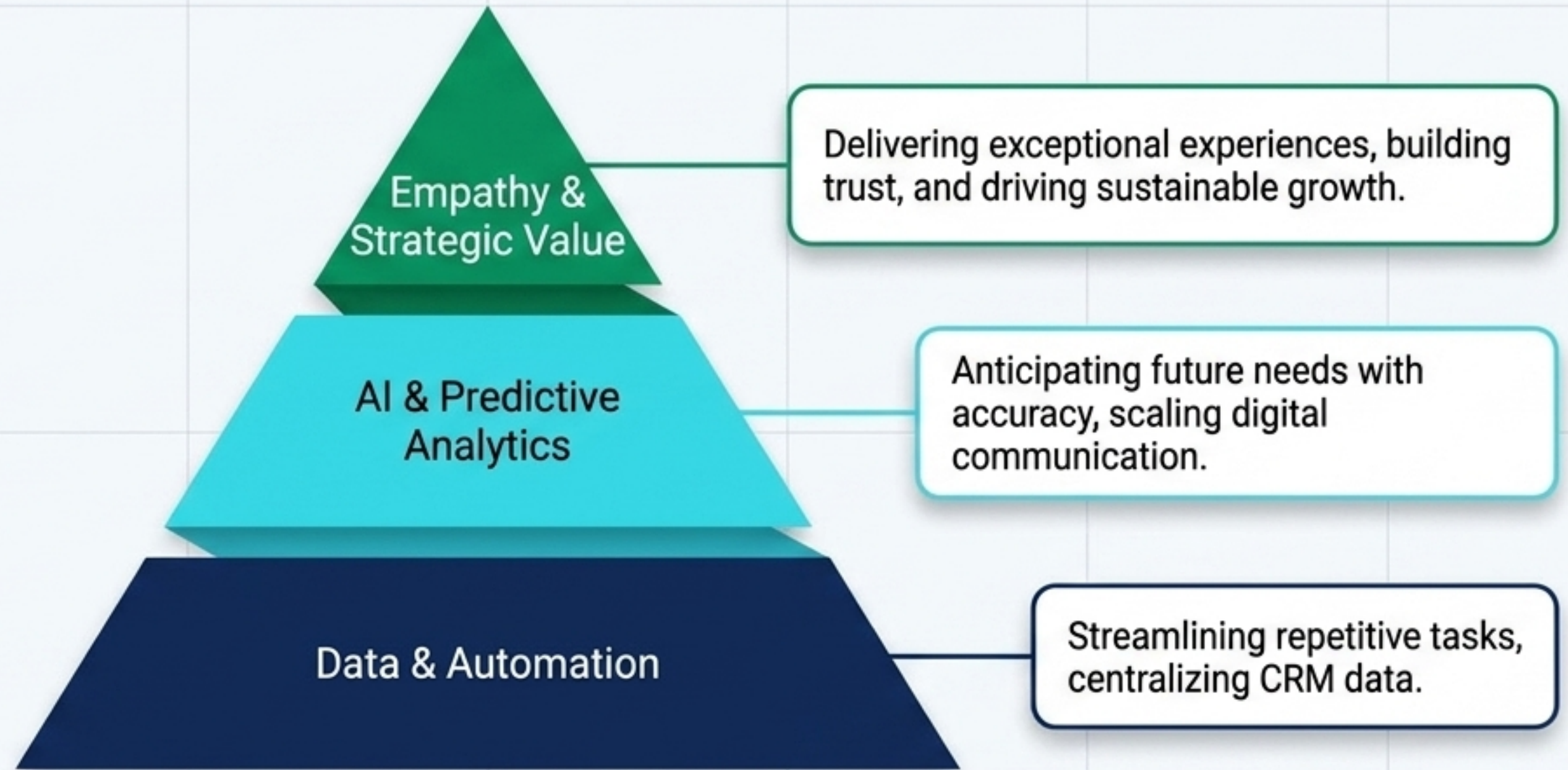
CSM tools analyze usage patterns to pinpoint the exact moments when additional products or services will genuinely add value to the customer experience.

## The Consultative Mindset

Rather than pushing products solely for profit, CS teams act as trusted advisors, driving revenue through solutions that align perfectly with demonstrated customer needs.



# The Future CS Engine: Scaling the Human Element



**The Ultimate Insight:** The future of CSM is driven by technological advancements, but the goal is deeply human. We automate workflows and leverage AI not to replace the Customer Success professional, but to free their time for high-impact, empathetic relationship-building. Prioritizing customer outcomes is the definitive engine for sustainable business growth, loyalty, and advocacy.