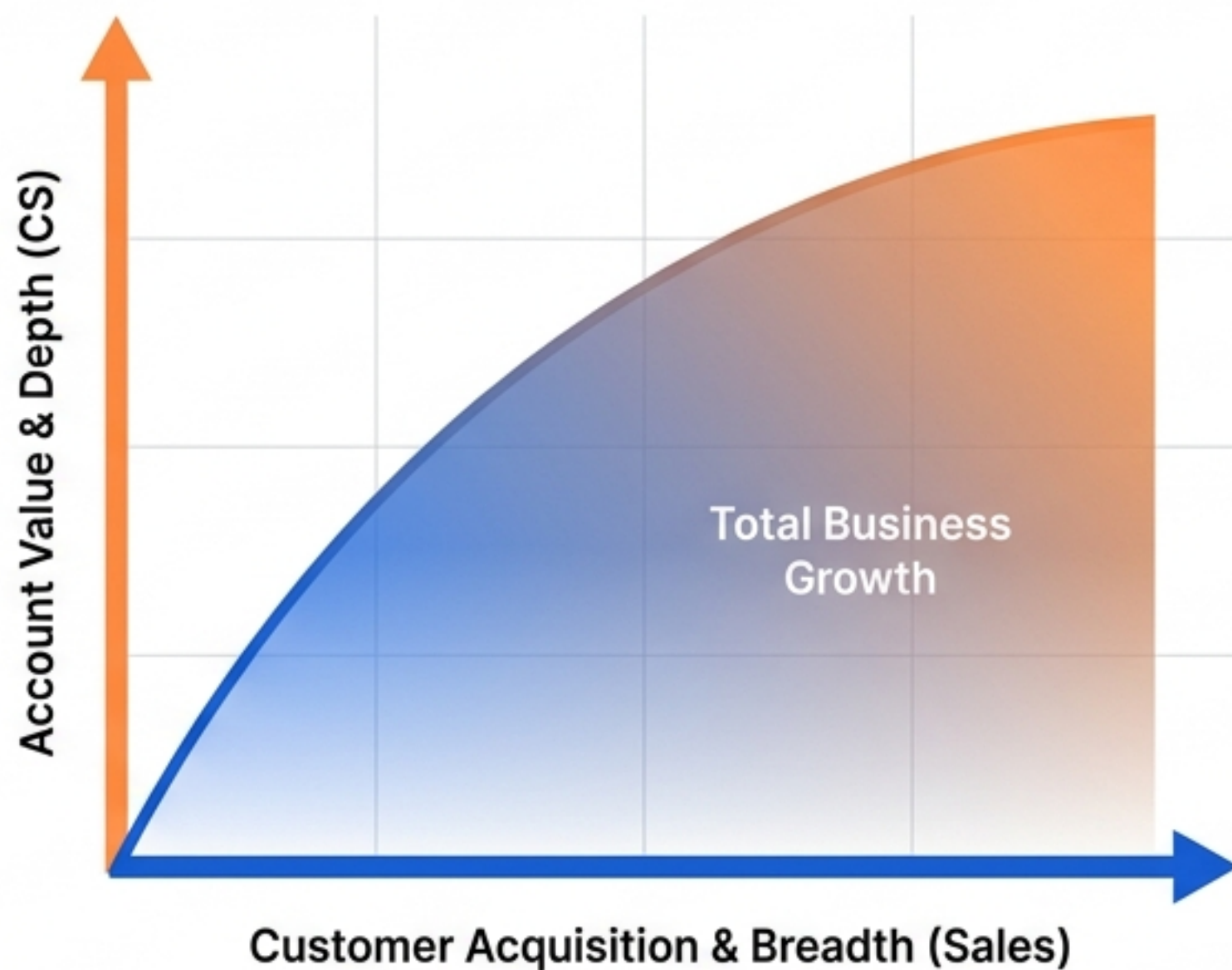


The Unified Revenue Engine

A Strategic Blueprint for Aligning Sales and Customer Success



The Anatomy of the Revenue Engine



	Sales	Customer Success
Primary Goal	Acquiring new customers and expanding accounts.	Ensuring customers achieve desired outcomes and driving retention.
Key Metrics	Sales volume, conversion rates, and average deal size.	Product engagement, satisfaction levels, and onboarding success.
Customer Focus	Navigating complex buying processes and current pain points.	Anticipating evolving needs, providing guidance, and fostering loyalty.

Diagnosing the Friction: Siloed vs. Unified Operations

The Old Way: Siloed



Isolated CRM data; CS starts from scratch.



Handoff: Hard boundary; dropped context after the contract is signed.

Accountability: Separate goals (Closing vs. Fixing). 

Feedback: → One-way street.

The New Way: Unified



Shared data; Sales context directly fuels CS onboarding strategies.



Collaborative overlap; seamless transition and joint onboarding.



Shared objectives (Increasing customer retention rates and expansion).



Continuous feedback loop informing product development and marketing strategies.

The Interdependent Flywheel of Growth

Sales Context Informs CS

Understanding buyer motivations and expectations during the sales process allows CS to tailor onboarding and support.

Unified
Growth

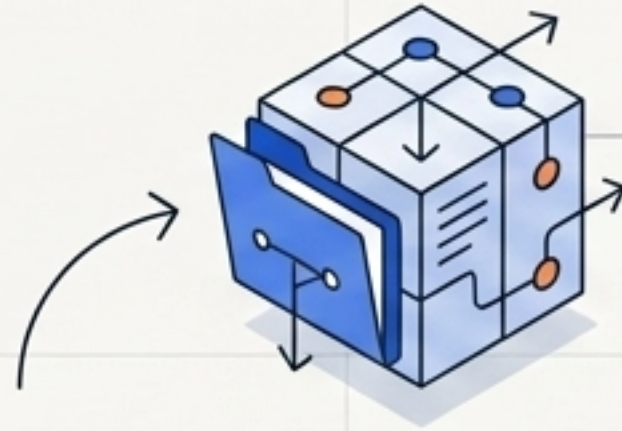
CS Success Fuels Sales

Satisfied, engaged customers lead to contract renewals and referrals, creating a virtuous cycle for Sales to generate repeat business.

Redefining the Transition: The Context Handoff

Phase 1: Sales Process

Focuses on articulating value and gathering goals.



Data Package: Transfers customer goals, pain points, and expectations to eliminate the 'starting from scratch' problem.

The overlap zone

Phase 3: Onboarding & Support

CS tailors the approach based on the Data Package.

Phase 4: Renewal & Expansion

Sales and CS collaborate to identify upsell and cross-sell opportunities based on evolving needs.

Bi-Directional Information Exchange

CS Data Empowering Sales



High-value customer feature usage → Sales emphasizes these features in new pitches.



Engagement & satisfaction levels → Sales prioritizes leads ready for upsell or flags at-risk churns.



Sales Insights Empowering CS



Pre-sale customer motivations → CS customizes training sessions and resources for specific use cases.



Navigating complex buying processes → CS understands the stakeholder dynamics dynamics for ongoing account management.

The Shared KPI Bridge

Sales Execution

- Sales Volume
- Conversion Rates
- Average Deal Size

Shared Accountability:
Customer Retention
Rates & Net Promoter
Score (NPS)

CS Execution

- Product Usage
- Onboarding
Velocity
- Check-in Health

Regularly reviewing shared metrics in joint meetings establishes a common framework, creating transparency and motivating collaborative performance.

The Alignment Operating System



Systems & Tech

Shared CRM and project management tools; collaborative communication platforms for real-time insights; centralized tracking for joint initiatives.



Metrics & Strategy

Shared KPIs (Retention, NPS); prioritizing leads based on CS usage data; collaborative journey mapping.



People & Culture

Cross-functional teamwork initiatives; leadership modeling collaborative behaviors; recognizing and rewarding joint successes over individual wins.



Process & Rhythms

Regular joint meetings to discuss challenges and brainstorm; shared goal setting for account expansion.

Institutionalizing Cross-Pollination

Sales Learning from CS

Sales professionals participate in cross-training to understand the common challenges customers face during onboard.

Impact: More accurate expectation-setting during the pitch.



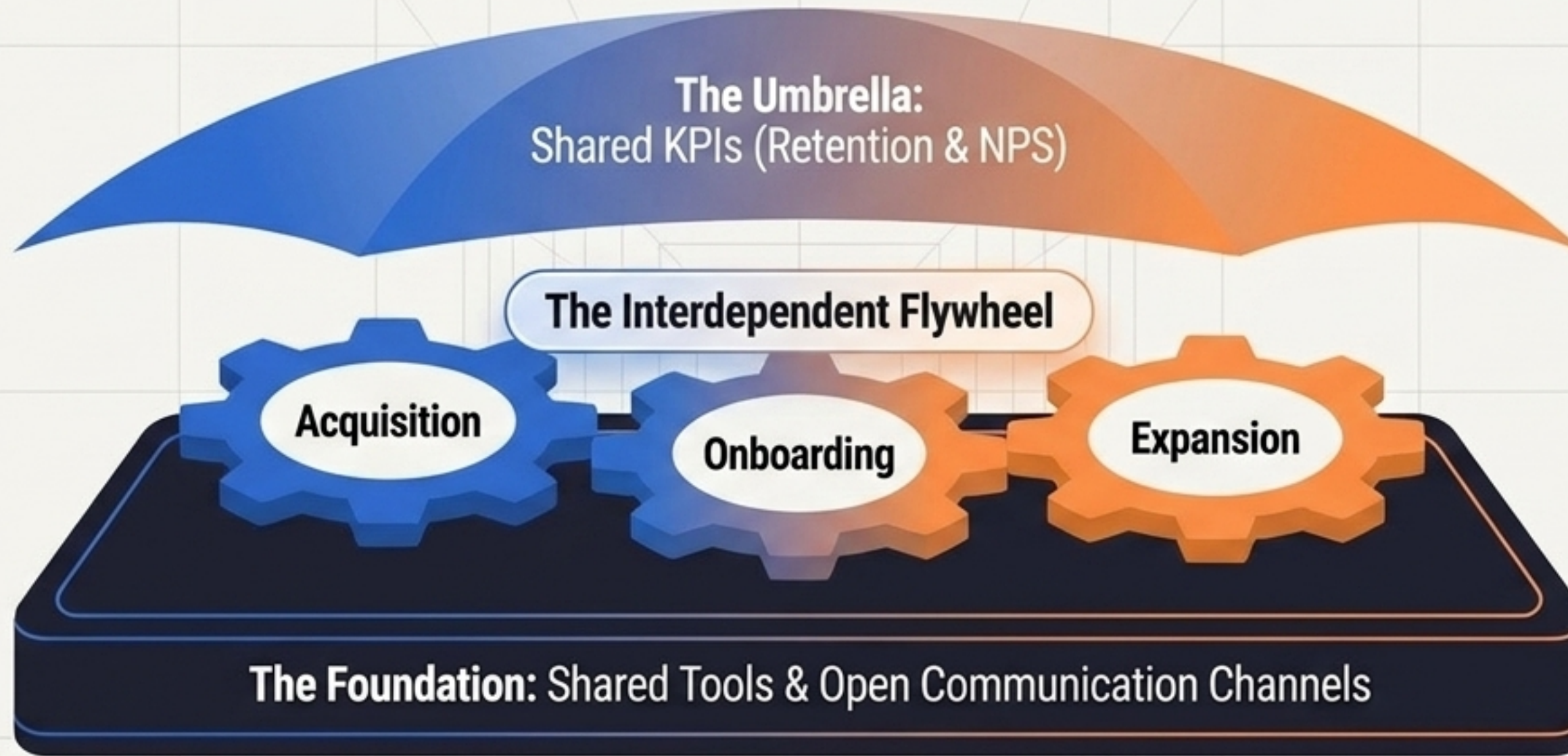
CS Learning from Sales

Customer Success Managers learn effective selling and value-articulation techniques.

Impact: Better identification and execution of cross-sell and expansion opportunities during regular check-ins.

Ongoing cross-training empowers team members to provide valuable, holistic insights during every client interaction.

The Aligned Growth Ecosystem



Alignment is not a one-time project. It is a continuous cultural and operational commitment that maximizes customer satisfaction and drives sustainable revenue growth.