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How mature is your customer success strategy?

Take the assessment.

For a modern services business to thrive, it must have customer success at its core, proactively driving growth and profitability. In today's services-led economy, where customer expectations are higher than ever and renewals determine success (or failure), every interaction a customer has with your organization—in every functional area, from opportunity to renewal—can either bring them closer to you or push them away.

To stay ahead of the curve, consistently delivering outstanding customer experiences is a must. To achieve this, you need to run a connected, digital business that enables true customer centricity, drives efficiency, and fosters seamless collaboration across all departments.

Not sure where to start? Use this assessment to identify strengths and uncover opportunities for improvement in key areas such as people, processes, and technology.

People

Are you engaging the right resources?

Dedicated Roles:

Do you have dedicated Customer Success Managers (CSMs) focused solely on customer success, or do they juggle multiple responsibilities?

Team Structure:

How is your customer success team structured? Are roles clearly defined, or is there overlap with other functional areas that leads to confusion?

Customer Engagement:

How frequently do CSMs interact with customers? Are these interactions proactive and planned or impromptu and reactive?

Internal Collaboration:

Do all customer-facing teams have the same visibility on customer engagement, resource allocation, and project status? How do you ensure that all teams are aligned and informed? Are these workflows efficient, or do silos and rigid processes hinder collaboration?



Processes

What are your current processes and workflows like?

Handoff Process:

How is the handoff from sales to services to customer success teams handled? Is there a structured process in place to ensure smooth transitions?

Engagement Model:

Do you use a high-touch, low-touch, or hybrid engagement model? Does it align with your customer segments? Do you have dedicated customer success management programs for different customer groups (e.g. dedicated CSMs for high-risk, high-growth customers and a call center success model for low-risk, low-growth customers)?

Customer Lifecycle Mapping:

What types of customers do you serve? What processes do you have to map the customer lifecycle? Are there clear touchpoints and milestones? Are you able to track customer activities and capture customers' business value objectives?

Feedback Loops:

How do you gather and utilize customer feedback? Are there established processes for acting on this feedback—with actionable steps?

Success Playbooks:

Have you developed customer success playbooks based on objective health metrics and customer feedback? Is there a customer success solution in place that triggers these playbooks based on key customer activities?

Renewal Forecasting:

Do you align your sales and customer success teams around a structured renewal pipeline process that ensures visibility into the forecast?

Technology

Do you have the right tools?

Automation:

Are there any manual processes that could benefit from automation to improve efficiency? Does information flow seamlessly between teams? Are there established communication channels that facilitate this?

Tools and Platforms:

What customer success tools do you currently use? Are they integrated with your existing systems, such as CRM or analytics platforms?

Data Accessibility:

Do your services and customer success teams have access to the same data or do you have disparate data sources? Is the data up to date or stale?

Unified Customer Data:

Is customer data tracking standardized and accessible for all customer-facing teams? Do you have a master customer record that consolidates financial, operational, and support data, along with tailored dashboards for assessing customer health?

Data Utilization:

How do you leverage data and customer insights to inform your customer success strategies and replicate engagement trends from successful customers? Do your tools include an early warning system that offers insights into customer consumption and the value they gain from your services? Are you utilizing pragmatic AI solutions to guide customers on their next actions?

**Upsell and Cross-Sell Potential:**

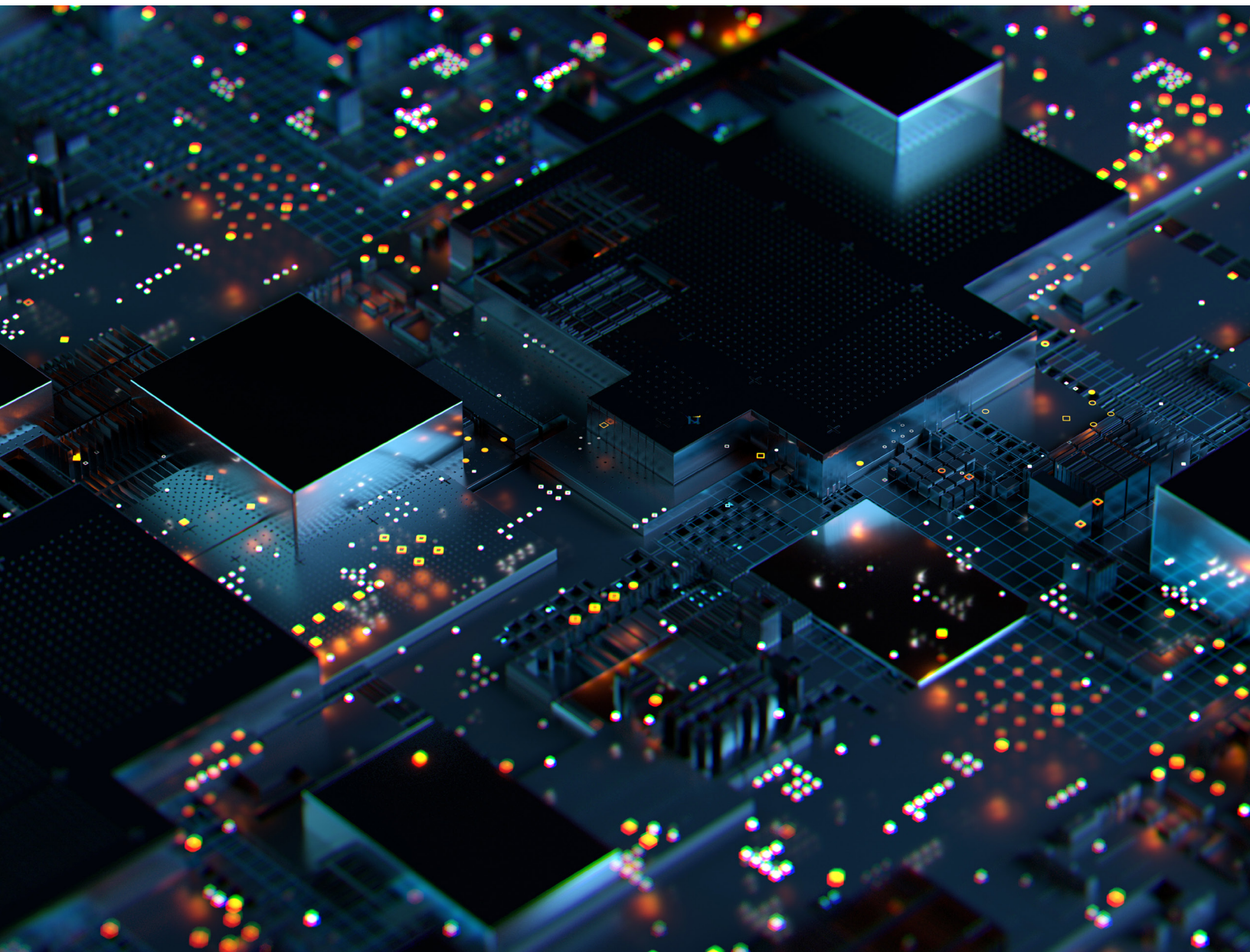
Do your services facilitate upselling and cross-selling within your existing customer base? Do you have the right tools to analyze customer data and create tailored packages that meet your customers' needs?

**Scalability:**

As your business grows, how scalable are your current technologies? Will they support increased customer engagement and resource management needs?

**Metrics:**

Are you able to easily produce the information you require to support key metrics such as NRR, NPS, CHS, CLV, retention rates, attachment rates, etc.? Can you support account-level profitability decision-making?



Key Metrics

Tracking key customer success metrics is crucial for understanding the overall health and performance of your services business. These metrics provide valuable insights into customer satisfaction, loyalty, and profitability. The ability to capture and act upon this data is a sign of your organizational maturity.

- **Net Revenue Retention (NRR)** measures the percentage of recurring revenue retained from existing customers over time, including upgrades, downgrades, and churn.
- **Net Promoter Score (NPS)** gauges customer sentiment by asking customers how likely they are to recommend a company's services on a scale from 0 to 10. The NPS is calculated by subtracting the percentage of detractors from the percentage of promoters.
- **Customer Health Score (CHS)** is a composite metric that assesses the overall health of customer relationships based on usage, engagement, and feedback.
- **Customer Lifetime Value (CLV)** estimates the total profit generated from a customer throughout the business relationship, taking into account revenue earned and the cost to service the account.
- **Retention Rates** measure the percentage of customers continuing business over a specific period. It is calculated by comparing the number of customers at the start and end of a given period.
- **Attachment Rates** refer to the percentage of customers who purchase additional services alongside their primary purchase.
- **Customer Satisfaction Score (CSAT)** measures how satisfied customers are with a company's services, typically assessed through surveys. It is calculated by taking the average of these ratings or by determining the percentage of customers who rate their satisfaction positively.
- **Time to Value (TTV)** measures the time taken for a customer to realize the value of a service after purchase. TTV is calculated from the moment a customer begins using the service until they achieve a predefined success milestone, such as completing a project or achieving specific outcomes.
- **Cost to Serve (CTS)** refers to the total cost incurred to provide services to a specific customer including both direct and indirect costs.

A connected business is key to true customer success

While managing existing customers that renew and expand can be highly profitable, many organizations still operate inefficiently. To thrive, services businesses should prioritize end-to-end visibility into customer interactions, accessibility to the right resources, and seamless connectivity throughout the customer lifecycle. Combining information about the revenue earned from customers, with the cost to serve for those same accounts, provides detailed insight into customer lifetime value, which ultimately leads to greater business profitability.

To run a connected business, services leaders need to leverage the right digital technologies to create seamless interactions across all departments, ensuring that every team—from sales to customer success—works in harmony to deliver a genuinely customer-centric experience.

[Connect with our experts](#) to uncover strategies that will transform your customer relationships into a powerful engine for success, shifting your customer success function from a cost center to a profit-generating powerhouse.

How did you do with your assessment?

Certinia elevates business growth through a complete Services-as-a-Business solution spanning services delivery, finance, and customer success. Native to the leading cloud platform, Salesforce, Certinia enables organizations to run a connected business, deliver with intelligence, and achieve scalable agility.

[TALK TO OUR EXPERTS](#)

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