

Ultimate Customer Success Org Guide

Type of Company	Who You Are	CS Strategy	Reporting Structure	Executive Profile	CSM Profile	Renewal Ownership	Expansion Ownership	CSM Compensation
Startup with High Touch Business	Seed-funded or Series A/B venture-funded startup; customer Average Contract Value > \$75K.	Get massively-successful clients who become huge advocates.	The Customer Success leader should report directly to the CEO.	Leads from the front; phenomenal with clients; helps scale with your customers; knows how to connect with executives at your customers and teach your team how to do the same; likely has early career experience in an environment (e.g., strategy consulting) where they learned "high touch" client service; consider asking them to lead a mock executive meeting in the interview to see how they think.	Strong in complex business relationships; skillset of a "Consultant"; understand your client's business and map the client goals to your offerings; build a path forward across multiple stakeholders.	Sales should continue to own renewals at this stage (likely, you don't have a lot). In this way, the CSM can stay laser-focused on customer adoption, outcomes, and advocacy.	For the same reasons, Sales should continue to own expansions. In a high-touch business, expansion is often an essential important part of long-term relationship management.	Pick leading indicators to focus the CSMs on. These can be tied to adoption (e.g., active users), outcomes (e.g., ROI demonstrated), and advocacy (e.g., NPS or referenceability). Roll these all up into a customer health score, and focus the CSMs on improving client health.
Startup with Low Touch Business	Seed-funded or Series A/B venture-funded startup; customer Average Contract Value < \$75K.	Get your clients to adopt your solution and get value from it; demonstrate unit economics (e.g., Gross Retention Rate) that are attractive for future investors.	The Customer Success leader should report directly to the CEO.	Strong at establishing processes that help you scale; creates effective methods for onboarding clients, driving adoption, and optimizing retention; ideally has worked with a similar profile of business; may even be an "up and comer," with this being a first leadership role.	Open to multi-tasking across relationship management, product expertise, project management, etc.; CSMs likely came out of other client service roles in the past.	CSMs may eventually own renewals, in this early stage, they likely do not. This enables them to stay focused on the early indicators for retention.	For the same reasons, Sales should continue to own expansions.	Pick leading indicators to focus the CSM on. These can be tied to adoption (e.g., active users), outcomes (e.g., ROI demonstrated), and advocacy (e.g., NPS or referenceability). Roll these all up into a customer health score and focus the CSMs on improving client health.
Scaling Company with High Touch Business	Growth stage private or public company; customer Average Contract Value > \$75K.	Drive your clients to ever-increasing value, maturity, and outcomes. This value makes them want to so they stay and also grow. Now, you are focused on Net Retention.	Hire a Chief Customer Officer reporting to the CEO. They should have all post-sales responsibilities (Customer Success Management, Support, Professional Services, and Training, etc.) underneath them.	Knows what world-class client service at scale looks like; very strong at collaborating with Sales and Product; likely started their career in a high-touch client service role (e.g., management consulting).	Start and end with a focus on business value and outcomes; excellent at orchestrating work across the company to drive toward client goals; extremely strong at executive communications.	CSMs likely do not own renewals. However, you may pull renewal responsibility away from the Sales team over time into a dedicated Account Management or Renewal Operations organization, particularly for clients without much expansion upside.	Sales team members typically continue to own client relationships, except for situations where clients already have most of what the vendor offers. In these situations, clients are sometimes covered by an Account Management team.	Combination of leading indicators (e.g., around client business outcomes) and Net Retention at a team level.
Scaling Company with Low Touch Business	Growth stage private or public company; customer Average Contract Value < \$75K.	Maintain and perhaps improve Gross Retention, and create more opportunities for cross-sells, while improving your efficiency as a team.	The Chief Customer Officer owns all post-sales responsibilities and reports to the CEO. If not, they report to a President-type role who also has Sales underneath them. It's critical for CS and Sales to be on equal footing.	Operational mastermind; exceptional at analyzing inputs, defining a strategy, setting objectives, and rallying the team; strong at growing and developing leaders and teams.	Strong at process and volume; over time, will have more accounts and need to be excellent at time management and organization.	Over time, CSMs in these companies often end up owning renewals.	For similar reasons, CSMs often own smaller expansions (e.g., license additions).	Strong focus on Gross Retention and/or Net Retention.
Technical Buyer	Company that sells to a technical buyer (e.g., Dev Ops and Security).	Increase stickiness of your solution, knowing that traditional CSM techniques (e.g., meetings and business reviews) may not be effective.	The Chief Customer Officer owns all post-sales responsibilities and reports to the CEO. They may also own pre-sales (sales engineering) to link the entire client journey together. If they don't report to the CEO, they report to a President-type role who also has Sales underneath them. It's critical for CS and Sales to be on equal footing.	Experience working in companies with technical products; extremely strong linking CSM with technical support and with the product/engineering team; a concise communicator, since technical audiences can sometimes be impatient.	Background with some domain experience (e.g., former security professionals in a security vendor; understand the product in detail and can connect the technology to client business goals.	CSMs in these companies likely do not own renewals - they are typically owned by the Sales team or, eventually, a dedicated Renewals or Account Management team.	For similar reasons, the Sales team often retains controls of expansions.	Incentives based upon product adoption, product stickiness, and business outcomes.
Product-led Growth Model	A company with a Product-led Growth (PLG) model where customers can try and sometimes buy the product without talking to anyone.	Line between CS and Sales is much blurrier. Often, the CS team's job is to take smaller customer deployments and help nurture them. They grow over time into enterprise deployments.	Often have an integrated Sales and CS organization underneath one leader (e.g., a President or Chief Revenue Officer). Under that person, there is frequently a Chief Customer Officer owning all the "post-sales" parts of the customer journey.	Experience with high-volume businesses and using data to drive decisions; strong at working with Product teams.	Come from other customer-facing roles like Sales Development Rep, Support, or Sales Engineering.	CSMs in these companies often own renewals.	Larger expansions are usually sent back to Sales. In some cases, CSMs can handle smaller expansions.	Combination of leading indicators (e.g., adoption) and lagging indicators (e.g., Net Retention).