

Customer Lifecycle & Success Management

Manage the full customer lifecycle with real-time visibility into onboarding, engagement, and growth.

Specification

SKU	BUS-REV-CLS
Solution area	Business Operations
Works with	Sales CRM, Product Analytics & Insights, Customer Feedback & Feature Requests, Revenue Operations & Forecasting
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Customer Lifecycle & Success Management is the process of managing customer relationships across their full lifecycle—from onboarding and adoption through renewal and expansion. It ensures that customers achieve value and that organizations maximize retention and growth.

SmartSuite’s Customer Lifecycle & Success Management solution provides a structured, scalable system to manage customer relationships from onboarding through adoption, retention, and expansion.

It enables organizations to move beyond basic CRM tracking to a connected lifecycle management platform that drives customer success and revenue growth.

Core capabilities

Customer Onboarding & Implementation Workflows

Manage onboarding processes and milestones.

Customer Health Scoring & Monitoring

Track engagement, usage, and risk indicators.

Lifecycle Stage Tracking

Monitor customers across onboarding, adoption, renewal, and expansion.

Renewal & Retention Management

Manage renewal timelines and reduce churn.

Expansion & Upsell Tracking

Identify growth opportunities within accounts.

Customer Engagement & Activity Tracking

Monitor interactions and touchpoints.

Integration with Product Usage & Feedback Data

Connect lifecycle with real product insights.

Workflow Automation & Alerts

Trigger actions based on customer behavior.

Dashboards & Customer Analytics

Provide visibility into performance and trends.

The Customer Lifecycle

Step 1 Onboard Customer Manage implementation and initial setup.	Step 2 Drive Adoption & Engagement Ensure customers are actively using the product.	Step 3 Monitor Health & Risk Track engagement and identify potential issues.	Step 4 Manage Renewals Ensure timely and successful renewals.	Step 5 Expand & Grow Accounts Identify upsell and expansion opportunities.
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Who it is for

Customer Success Teams Manage onboarding, engagement, and retention.	Account Managers Drive customer relationships and expansion.	Sales Teams Support renewals and upsell opportunities.
Product Teams Understand customer usage and feedback.	Revenue Operations Teams Align lifecycle with revenue metrics.	Executive Leadership Monitor customer health and growth.

Works with

Sales CRM Provides account, contact, and opportunity data.	Product Analytics & Insights Tracks product usage and engagement.
Customer Feedback & Feature Requests Captures customer input and needs.	Revenue Operations & Forecasting Aligns lifecycle with revenue planning.

Built differently. Customer Lifecycle & Success Management runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Customer Lifecycle & Success Management configured for your organization, or read the full product entry at smartsuite.com/products/customer-lifecycle-success-management.

Schedule a demo