



The Customer Success Capabilities Framework

Best Practices for a Stronger and Scalable Customer Success Organization

Pillar One Customer Success Strategy and Scale	Pillar Two Customer Success Delivery	Pillar Three Customer Experience and Marketing Automation	Pillar Four Success Operations and Analytics	Pillar Five Opportunity Management	Pillar Six Monetized Customer Success
Strategy, Charter, and Organization	Customer Onboarding	Journey Mapping	Customer Success Playbooks	Lead Generation / Opportunity Development / Freemium	Customer Success Bundled Portfolio and Offers
	Adoption Framework	Success Plans	Value Validation		
Segmentation	Customer Health Scoring	Voice of the Customer	Customer Success		

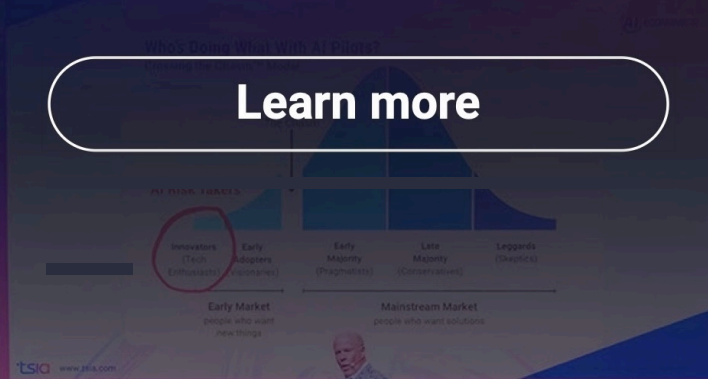


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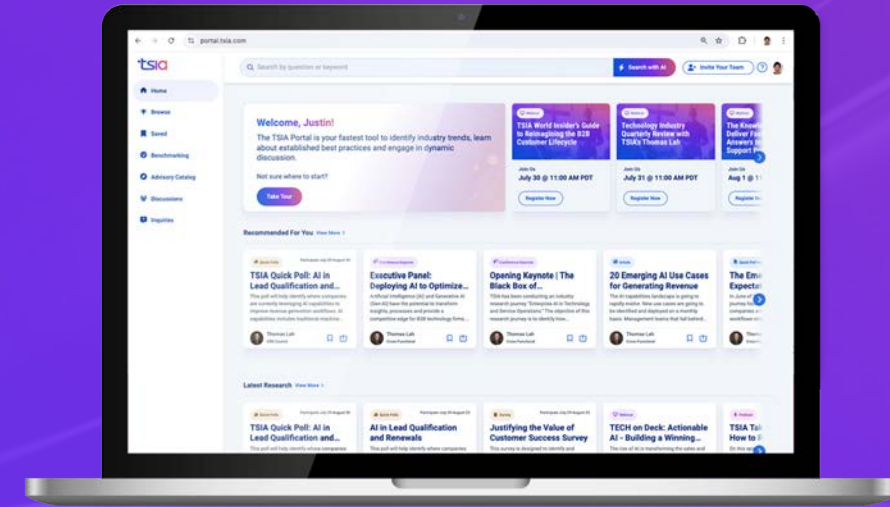
Introduction

Build a Stronger Customer Success Organization

If you're looking to grow, scale, and drive profitability in your customer success operations, it all starts with the proper foundation. That's where the TSIA Customer Success Capabilities Framework comes in.

This framework outlines the essential capabilities your organization needs, organized across six core pillars that build on each other. It's not just a checklist. It's a structured, strategic approach that helps you focus your time and resources where they'll make the most significant impact.

By exploring each pillar, you'll discover where your customer success organization stands today and where to invest next to improve efficiency, maturity, and results.



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Designed to give tech executives, department heads, and senior managers free access to a wealth of career-advancing and proprietary data, research, and insights. Powered by AI, the portal lets you easily search and find what you're looking for in seconds. With a customized profile, you'll get personalized recommendations on the topics that matter to you most delivered directly to your inbox. While a TSIA membership will give you the most value, there are so many benefits you can enjoy with a free TSIA Portal account.

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Why it matters

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Instant Value: Summarizes reports, answers questions, and visualizes data in seconds.

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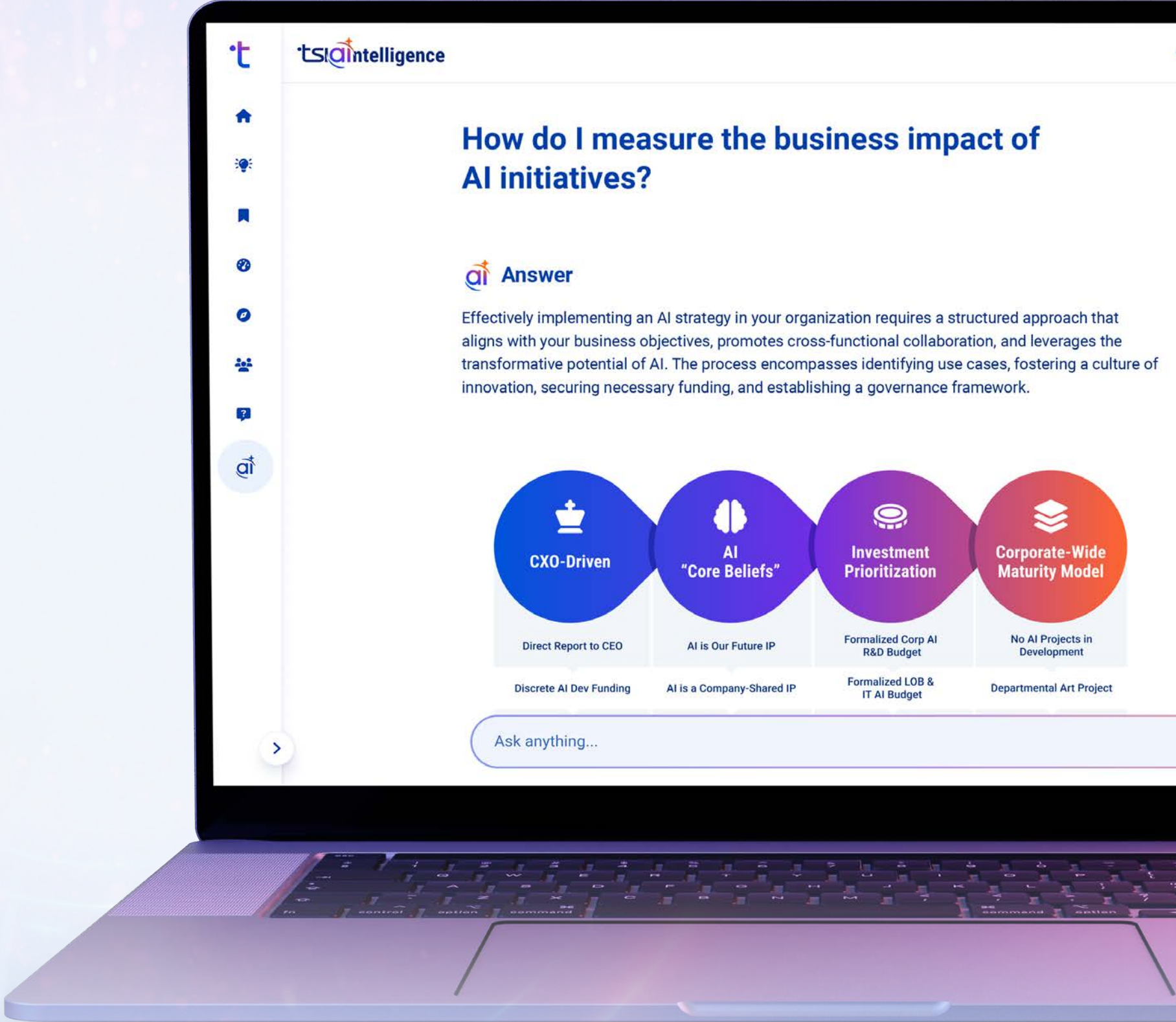


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What You Need To Know Before You Begin

A Practical Framework To Strengthen Customer Success

The TSIA Customer Success Capabilities Framework is here to help you take a more strategic approach to how your customer success team operates. Whether you're just launching your customer success function or you're leading a mature team looking to improve, this framework will help you assess where you are and what to build next.

You won't find one-size-fits-all instructions here. Instead, you'll get a best-practice blueprint that reflects real-world insights from leading technology companies around the globe. Each capability is organized in a logical, beginning-to-end format—designed to help you prioritize and build with purpose.

Tailored To Fit Your Organization's Needs

While the capabilities are presented in a specific order, they don't need to be developed in that exact sequence. Your company's unique context—especially your team's existing skills and internal processes—should guide your priorities.

Some capabilities, such as journey maps, success plans, and customer success playbooks, may require more time and effort to get right. That's okay. The goal is to help you assess your current situation and chart a realistic path forward.

What This Ebook Will (and Won't) Do

This ebook won't walk you through every implementation step in detail, but it will:



Introduce the essential capabilities for effective customer success.



Share practical insights based on TSIA's experience with top-performing companies.



Offer links to additional research and resources where appropriate.

By utilizing this framework and aligning your approach with proven best practices, you'll be better equipped to deliver consistent customer outcomes, enhance satisfaction, and drive growth across your business.

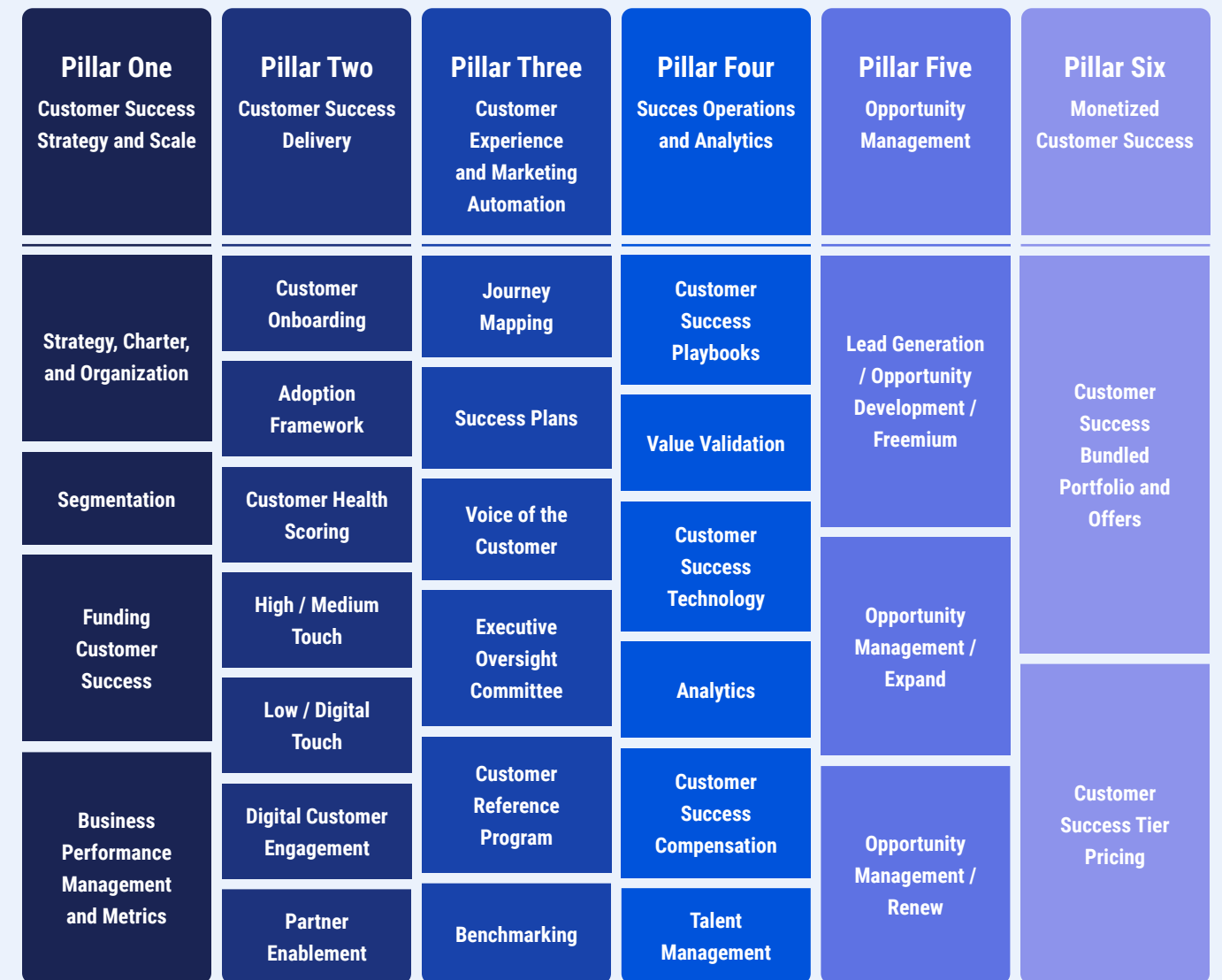


Figure 1. TSIA's Customer Success Capabilities Framework.

Pillar One

Define Your Customer Success Strategy and Scale

Before you can grow or optimize customer success, you need to get the fundamentals right. That starts with strategy. Pillar One of the TSIA Customer Success Capabilities Framework focuses on [defining your customer success strategy](#) and establishing the proper structure to scale it effectively.

Pillar One

Customer Success Strategy and Scale

Strategy, Charter, and Organization

Segmentation

Funding Customer Success

Business Performance Management and Metrics



Figure 2. Pillar One: Customer Success Strategy and Scale.

Strategy, Charter, and Organization

At its core, **customer success serves three primary purposes:**

- 1 Adoption**
Helping customers use your product successfully.
- 2 Expansion**
Driving growth within existing accounts.
- 3 Renewal**
Ensuring long-term retention and reducing churn.

These charters aren't just goals—they define the size, shape, and profitability of your entire customer success organization. If you're unclear about your charter, it will be challenging to scale customer success sustainably.

Get Clear on Account Segmentation

Once your charter is defined, the next step is to determine how you'll segment your customer base. Segmentation enables you to deliver the right level of support to the right customers—whether that's [high-touch, tech-touch, or something in-between](#).

Your segmentation strategy should consider both:

- 1** Customer preferences and needs.
- 2** Your internal resources and scalability.

Funding Customer Success

Customer success can't scale without sustainable funding. That's why you need to define how this function will be resourced clearly.

Standard funding models include:

- 1 Expansion**
Allocate from sales or marketing.
- 2 Inclusion**
Incorporate customer success costs into the cost of goods sold (COGS).
- 3 Renewal**
Generate revenue through premium offerings or value-based pricing.

The ultimate goal? Transition customer success from a cost center to a profit center.

Business Performance Management and Metrics

Once you've defined your strategy, structure, and funding model, it's time to measure what matters. Your KPIs should directly reflect your customer success charters—adoption, expansion, and renewal.

If you're looking for a solid starting point, check out our research paper, [Critical Customer Success KPIs, Metrics, and Health Score Variables](#).



Pillar Two

Customer Success Delivery

Now that you've defined your strategy, it's time to turn your plans into action. Pillar Two focuses on delivery—how you bring your customer success vision to life in a way that creates value, drives adoption, and builds trust.

Pillar Two Customer Success Delivery

Customer Onboarding

Adoption Framework

Customer Health Scoring

High / Medium Touch

Low / Digital Touch

Digital Customer
Engagement

Partner Enablement

Figure 3. Pillar Two: Customer Success Delivery.

Customer Onboarding

Whether onboarding falls under customer success or another team in your organization, one thing is clear: it's a critical moment. Onboarding is your first real opportunity to demonstrate value and establish a solid foundation for long-term success.



Don't Skip the Adoption Framework

Only **38% of companies** in the industry have a formal adoption framework in place—a significant gap with big consequences. Without it, your entire customer success delivery model is weakened.

Your adoption framework helps define:

- 1 How customers realize value from your solution.
- 2 What success looks like at each stage.
- 3 The tactics and resources needed to drive meaningful usage.

Customer Health Scoring

A solid customer health score isn't just a nice-to-have—it's essential. Here's the truth: **two of the top five health score indicators come directly from your adoption framework.** If you're serious about measuring customer success accurately, adoption is the starting point.

Match Engagement Models to Segments

Not every customer needs the same level of engagement. That's why it's important to [build engagement models tailored to your customer segments.](#)

Common models include:



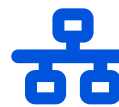
High-touch

Personalized, one-on-one engagement.



Medium-touch

A blend of human interaction and automation.



Low-touch

Primarily automated or one-to-many programs.



Digital-touch

Fully digital and scalable, often driven by product usage data.

Design these engagement strategies based on your customers' needs and your team's resources.

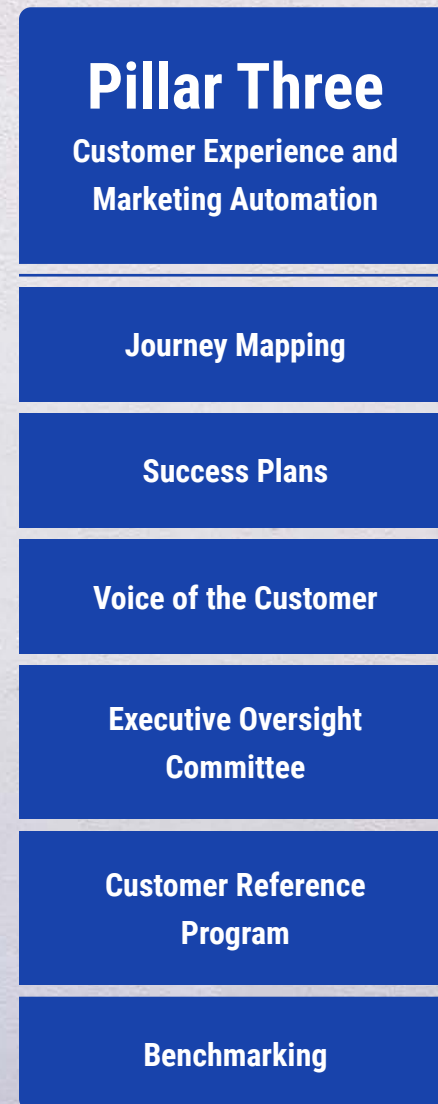
Partner Enablement

As you grow, you may find that your internal team can't handle every customer success motion. That's where partners come in. Increasingly, organizations are turning to trusted partners to expand their reach and deliver consistent experiences on a larger scale.

Pillar Three

Customer Experience and Marketing Automation

Automation can take your customer success efforts from reactive to strategic—but it won't happen overnight. Pillar Three is all about scaling your impact through intelligent automation. It's a heavy lift, but you don't need to get it perfect right away. Start with what's good, and iterate as you grow.



Begin With a Customer Journey Map

A strong automation strategy starts with understanding the customer journey. Mapping this out helps you identify where automation can support engagement, adoption, and value delivery at every stage of the process.

If you're new to journey mapping or need a refresh, our [Creating a Customer Journey that Maps to Success](#) webinar is a great entry point before diving deeper into our broader research.

Success Plans vs. Account Plans: Know the Difference

It's common to confuse account plans with success plans, but they serve different purposes. You'll want to make sure you're building the right one.

Account Plans are internal tools focused on sales goals.

Success Plans are shared with your customers and outline how you'll help them achieve outcomes.

Figure 4. Pillar Three: Customer Success and Marketing Automation.

Align Your Metrics With the Customer Experience

Automation is only valuable if it's built on accurate, actionable insights. That means validating your internal metrics against the actual customer experience. Don't guess—ask.

Make sure you're using:

- 1 Voice**
of the Customer (VoC) metrics.
- 2 Surveys**
aligned to industry best practices.
- 3 Real-time feedback tools**
to monitor satisfaction.

Explore the [TSIA KORE Score Framework](#)—a modern approach to measuring the customer experience beyond Net Promoter Score (NPS), for guidance.

Turn Insights Into Action With Executive Oversight

Once you've gathered feedback and telemetry, it's time to act. That's where an executive oversight committee comes in.

This group should be responsible for:

- 1 Reviewing**
VoC and telemetry data.
- 2 Identifying**
trends and issues.
- 3 Creating**
action plans to address gaps.



Benchmarking Customer Success

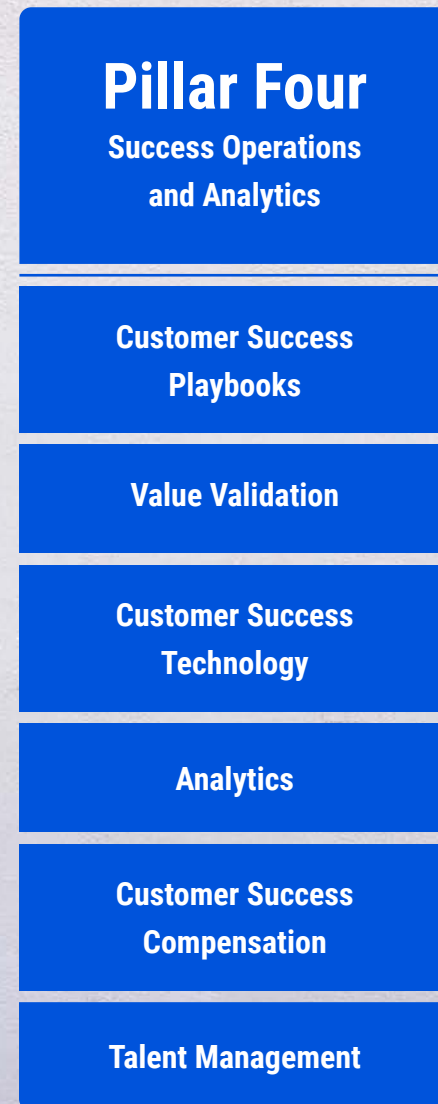
One of the most valuable uses of customer data is benchmarking. By using adoption telemetry from your customer success programs, you can help customers see how they're performing compared to peers and the broader industry.

Want to know how? [Our benchmarking process](#), detailed in our [report on TSIA benchmarking best practices](#), outlines precisely how to do this effectively.

Pillar Four

Success Operations and Analytics

You've mapped the journey, built automation, and started measuring the right things—now it's time to operationalize it. Pillar Four focuses on creating a scalable and intelligent customer success engine through structured operations, analytics, and the right technology.



Customer Success Playbooks

Playbooks are essential tools for customer success managers (CSMs). They provide clear guidance on how to respond to common customer scenarios—whether it's an upcoming renewal, an escalation, or signs of churn.

But don't stop at deployment. Ask yourself:

- 1 Did the customer receive value?
- 2 Did they achieve the goals you helped set?
- 3 Was the engagement meaningful from their perspective?

Use quarterly value reviews (QVRs) or digital feedback mechanisms to validate outcomes and refine your playbooks accordingly.

Customer Success Technology

It's not just about having technology—it's about using the right layers of technology to support your people, streamline processes, and enhance the customer experience.

Your tech stack should:

- 1 **Empower** CSMs to take action.
- 2 **Automate** routine processes where appropriate.
- 3 **Surface key data** for decision-making.

Figure 5. Pillar Four: Success Operations and Analytics.

Evolve Toward Predictive Analytics

Once you've developed telemetry, KPIs, and health scores, you're ready to take the next step: predictive consumption analytics.

This means using customer behavior, usage, and adoption data to:

- 1 Anticipate**
customer needs.
- 2 Proactively**
prevent churn.
- 3 Align**
success efforts with measurable business outcomes.

Predictive analytics turns your data into foresight—and that's a game-changer for scale.

Customer Success Compensation

When your success metrics align with your charter (adoption, expansion, renewal), they can also inform [how your teams are measured and compensated](#).

Leverage your telemetry data to:

- 1 Design**
compensation plans that reward real impact.
- 2 Benchmark**
your compensation strategies against others in the industry.
- 3 Ensure**
you're attracting and retaining top talent in customer success.

Strong operations require a strong foundation. The technology, metrics, and playbooks you build all contribute to one critical goal: enabling your team to succeed.

Pillar Five

Opportunity Management

Once you've built strong foundations and delivery systems, it's time to focus on driving growth. Pillar Five zeroes in on opportunity management—developing the capabilities that support expansion and retention, two key components of the customer success charter.

Pillar Five Opportunity Management

Lead Generation /
Opportunity Development
/ Freemium

Opportunity
Management / Expand

Opportunity
Management / Renew



Figure 6. Pillar Five: Opportunity Management.

Expand Through Lead Generation, Upsell, and Cross-Sell Opportunities

Growth within your existing customer base is one of the most powerful levers for revenue. With the charter of expansion, [your customer success team](#) can play a direct role in:

- 1 Identifying**
new use cases and product needs.
- 2 Surfacing leads**
for upsell or cross-sell.
- 3 Running proactive growth campaigns**
for existing accounts.

This isn't about turning your CSMs into salespeople. It's about creating thoughtful programs that guide customers toward solutions that add real value.

Make Renewals a Seamless, Scalable Process

Retention is the bedrock of sustainable growth. That's why your customer success organization needs a straightforward process for managing renewals—whether it owns the motion or partners with a sales, renewal, or channel team to get it done.

Key focus areas include:

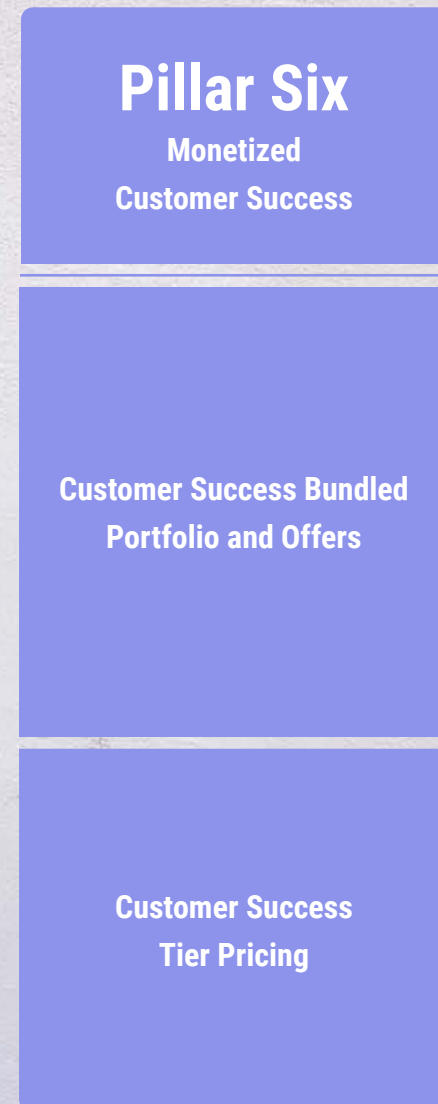
- 1 Workflow**
ownership (CS, sales, renewals team, or partners).
- 2 Process design**
based on deal complexity and customer value.
- 3 Profitability**
and margin considerations.

Not all renewals are equal, and your process should reflect that.

Pillar Six

Monetized Customer Success

Turning customer success from a cost center into a profit center is one of the most significant transformations your organization can make. Pillar Six focuses on monetizing customer success—an advanced capability that can be developed early or later, depending on your organization’s readiness.



Monetization Isn't Required Immediately—but It's Worth Considering

At TSIA, we recommend thinking about monetization early on, ideally, during your funding strategy in Pillar One. That said, it doesn't need to be your starting point. Many organizations wait until their daily customer success operations are well-established before layering in monetization.

The important thing is to recognize that monetized customer success can:

- 1 Generate**
direct revenue.
- 2 Justify**
investment in CS programs.
- 3 Shift**
your organization's perception of customer success from a cost to a strategic asset.

Figure 7. Pillar Six: Monetized Customer Success.

Start by Evaluating Your Offers

Begin by taking a close look at the customer success offerings you currently provide—onboarding, adoption services, health assessments, etc.—and compare them to what competitors are packaging and selling.

Ask yourself:

- 1 Are you giving away value-added services that could be monetized?
- 2 Are customers asking for high-touch services that you could offer as premium tiers?
- 3 How are your competitors pricing similar offers?

To dig deeper, check out our blog [Unlocking the Path to Monetizing Customer Success](#) and the full [Monetizing Customer Success](#) research report.

Putting the Framework Into Action

The TSIA Customer Success Capabilities Framework is more than just a reference—it's a practical starting point for building a scalable, high-impact customer success organization.

We've structured the framework intentionally. Each pillar builds on the foundation of the previous one, beginning with your customer success charter, segmentation strategy, and funding model in Pillar One. If those core elements aren't in place, your efforts in later pillars—like automation, analytics, and monetization—won't deliver the impact you're aiming for.

What's Next for Your Organization?

At this point, you may be asking: “How do we build these capabilities with the tools, people, and processes we already have?”

That's where TSIA comes in. This ebook introduces the framework and highlights key research, but it's just the beginning. [The TSIA Portal](#) features a comprehensive library of in-depth resources, case studies, and practical guides to help you transition from strategy to execution on your terms and timeline.

You don't have to build your customer success program alone. TSIA is here to help you do it faster, smarter, and with confidence.

Ideas for Action

Do these challenges resonate with you? If you're a tech services professional uncertain about the changes your organization needs to make—or concerned about how your role may be affected—TSIA can help.

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