

Gainsight

The (D)CS Index:

From Initiative to Infrastructure



Your Digital Slice of the CS Index

Consider this your abridged Digital CS version of the latest [Customer Success Index](#).

We read the report for you, highlighter in hand, notes in the margins, and then pressure-tested it against what we're seeing in the field. We layered in insights from digital customer success leaders, internal operators and external advisors, and pulled out what actually matters if you live in academy, community, in-product experience, or digital engagement.

We're here to cut straight to the facts: what the data is really telling us about Digital Customer Success, and what you should do about it. Now, none of this should feel like a shock.

If you've been in digital customer success, customer education, or community for more than a few years, you've felt this shift building. Digital has been gaining importance steadily. The infrastructure has been forming underneath the surface for a while.

What changed wasn't the direction, but rather the speed.

Market conditions compressed what might have unfolded gradually into something that suddenly felt urgent, or at least undeniable. What had been evolving in practice became impossible to ignore in the data.

The model of "Traditional CS" on one side and "Digital CS" on the other had become antiquated.

The new reality? Digital is not a segment, it is not a channel and it is not the 80% bucket that goes 'unmanaged'.



Sam Murray

Digital CX Leader & AlignedCX
Podcast Host

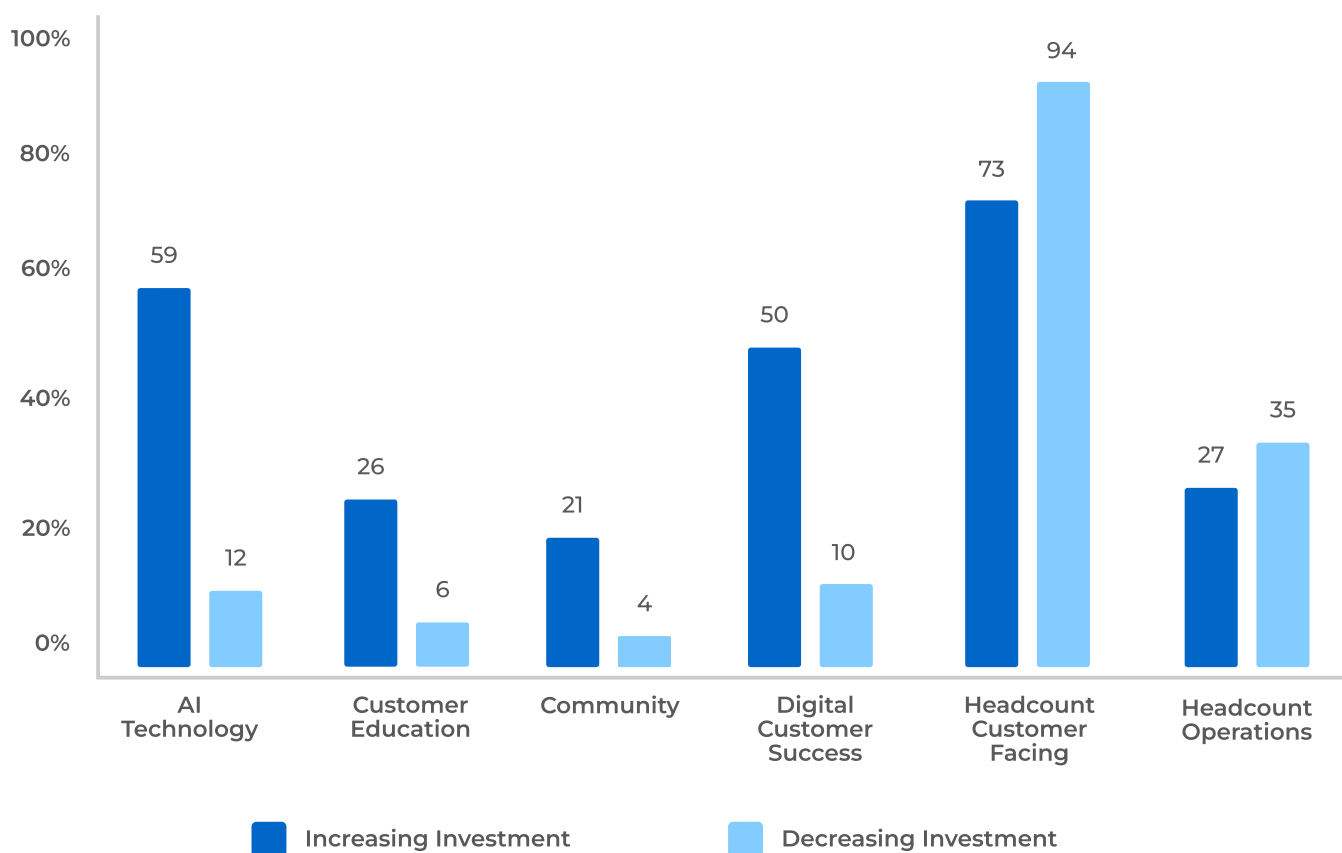
Digital can no longer just be a side channel anymore. It absolutely has to become the backbone, the underlying infrastructure that stabilizes the entire customer journey.

From Add-On to Backbone: Digital Investment is Up

Here's where the investment data becomes important.

The CS Index shows a clear pattern: investment in digital channels like learning management systems, community platforms, digital engagement tools, and AI layers is rising across Customer Success teams.

Increasing vs. Decreasing CS Investments



That matters because budgets reveal priorities.

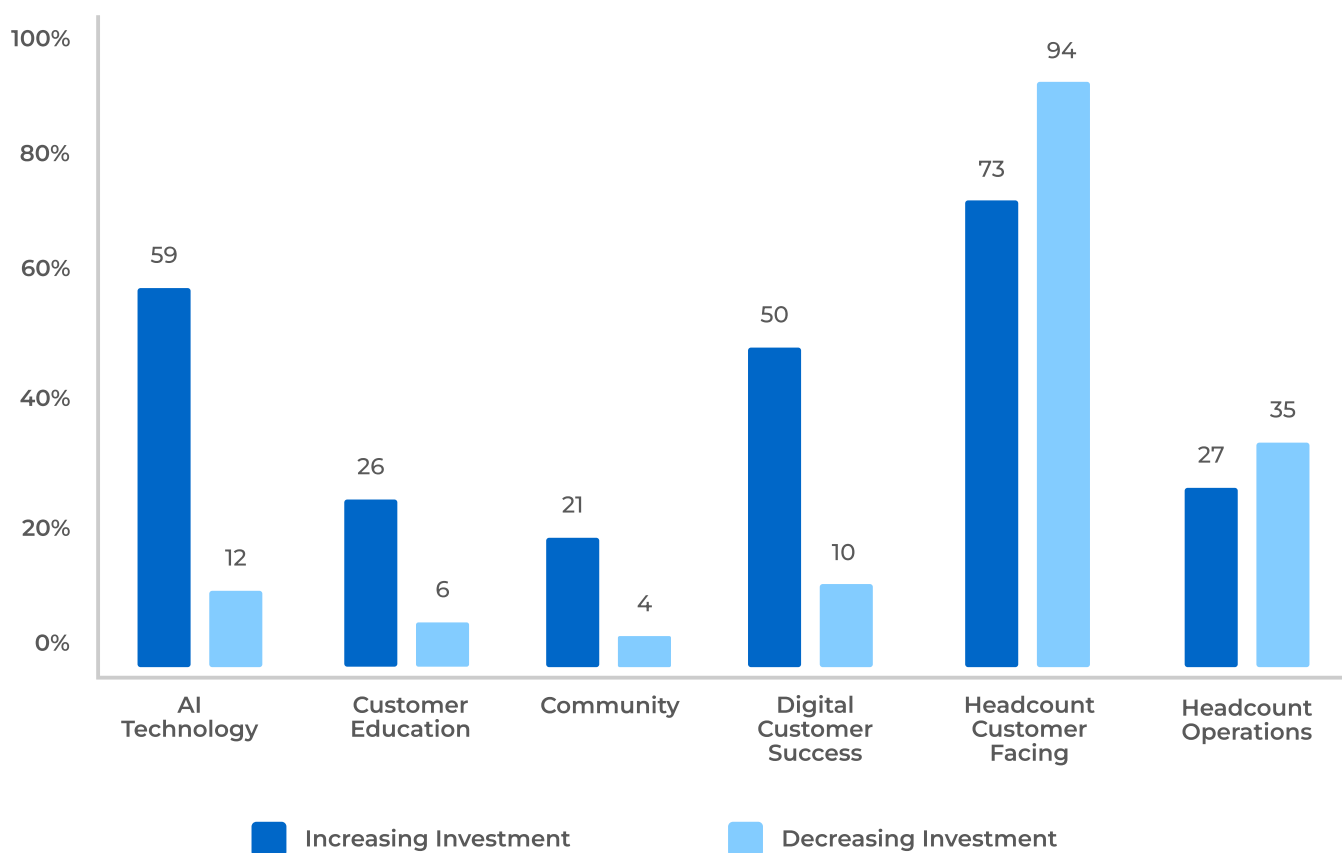
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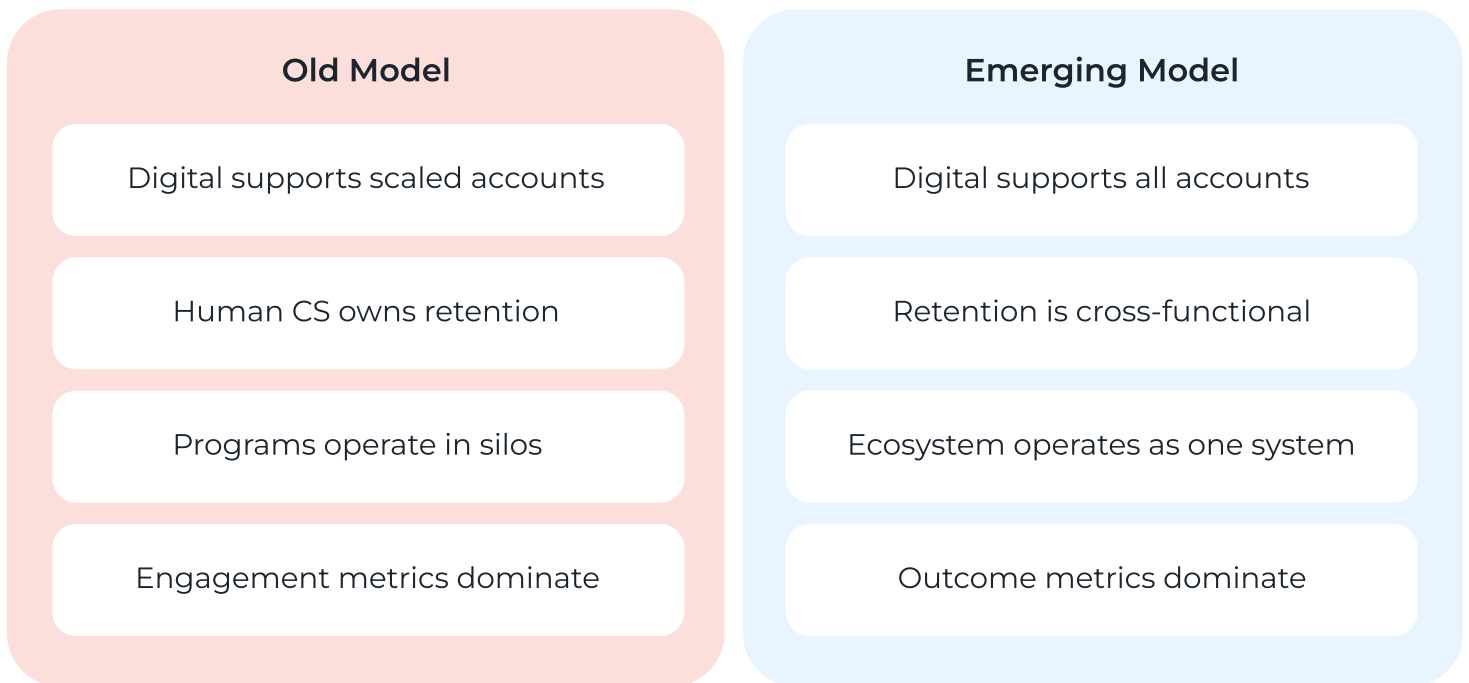
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Organizations are not pouring resources into LMS platforms, community ecosystems, and in-product guidance because they are “nice to have.” They are doing it because these systems create scalable leverage.

At the same time, traditional headcount growth is not scaling at the same rate. That combination tells us something structural: When infrastructure investment rises faster than people investment, the operating model shifts.

Digital can no longer sit as a supporting program, it becomes the system layer.

For years, the model looked like this:



Digital used to be synonymous with efficiency: “how do we handle the long tail?”

Now, it’s synonymous with efficiency AND stability: “how do we ensure every customer progresses, adopts, renews, and expands?”

When retention pressure increases and customers expect seamless, AI-enabled experiences, you cannot rely on human coverage alone. You need early activation journeys, education reinforcement, in-product guidance, community insights, and systems that surface risk before a CSM ever sees it.

And that heavily relies on digital becoming infrastructure. With that, changes cascade.

Ownership and Metrics: Shared, Not Siloed

If digital is infrastructure, then metric ownership cannot remain segmented.

You can't say:

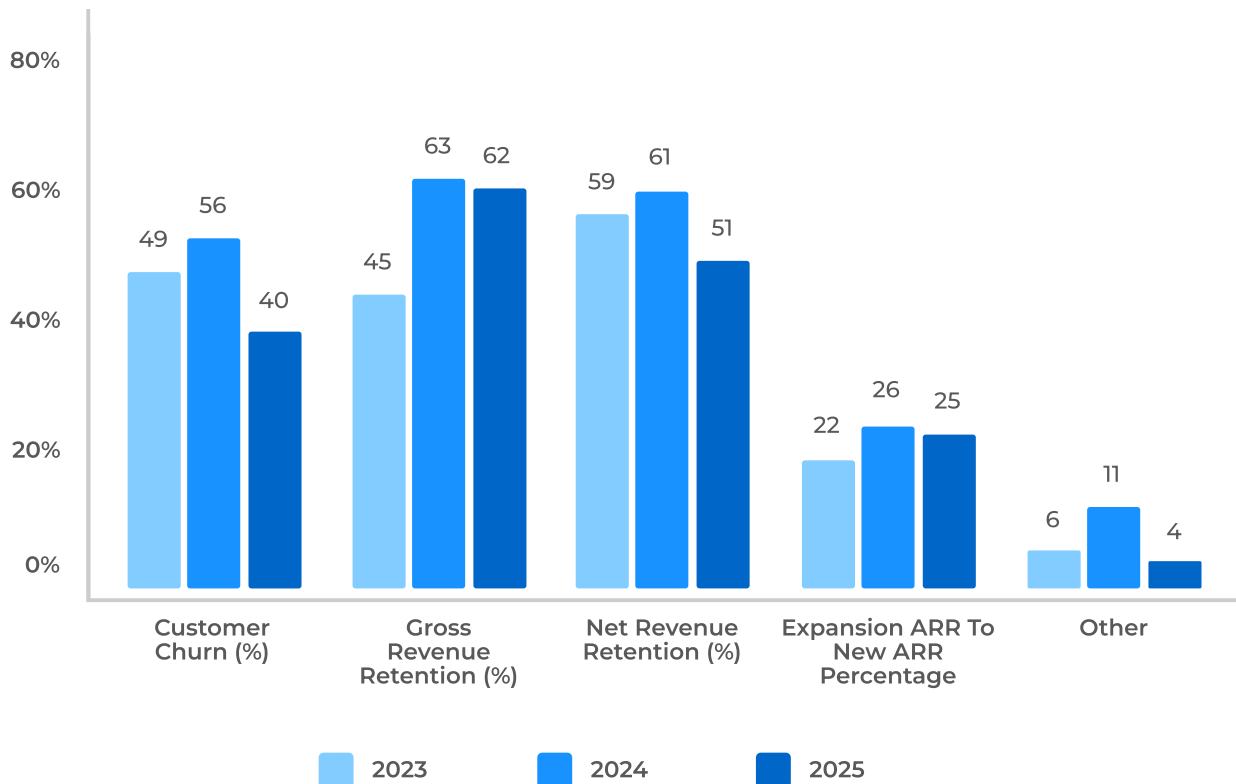
“Retention belongs to CSMs.”

“Engagement belongs to digital.”

“Expansion belongs to sales.”

The Growing Emphasis On GRR In Customer Success

CS - Primary Revenue Metrics Utilized





Because digital surfaces often see churn signals first:

- Feature stagnation
- Drop-offs in onboarding
- Declining engagement
- Slower time-to-value



And digital is uniquely positioned to influence:

- Activation milestones
- Adoption velocity
- Health score improvements
- Depth of product usage

That means digital teams are no longer measured by activity alone. They are measured by outcome contribution.

And something interesting happens—unifying metrics can cut through politics and existing team structures.

When everyone shares the same outcome definition, and digital has direct levers tied to it, the conversation shifts from “who owns this?” to “how do we move this?”

But here’s the critical part: Once digital owns a real piece of retention and expansion...you cannot sit back and wait for those outcomes to show up. You have to design toward them.



You Don't Wait for Retention, You Engineer It

An excerpt from a recent conversation with Sam Murray



Sam Murray

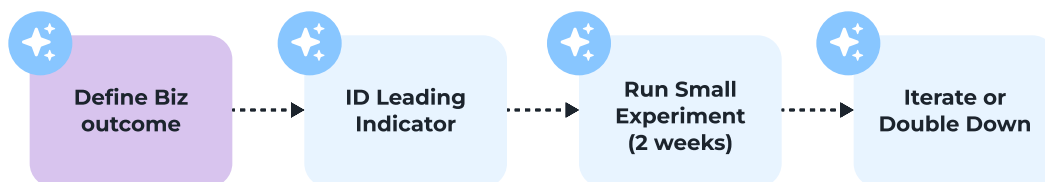
Digital CX Guru & Customer
Education Leader

This is where the old model breaks. The “ship and correlate later” approach does not work when you are directly accountable to GRR or NRR.

If digital owns part of churn reduction, you can't:

- Build for six months
- Launch
- Wait a quarter
- Hope correlation appears

You have to move differently.



Digital teams that are leaning into backbone status are doing three things:

1. Starting with the business outcome.
2. Defining the leading indicators they directly influence.
3. Running small, measurable experiments to validate impact quickly.

Instead of waiting to “prove value,” they are designing for it.

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Smaller swings create faster learning, and faster learning creates confidence. That means over time experimentation will feel safer and you'll reap the benefits.

For example, this might look like moving away from six-month certification builds and toward sprint-based experimentation:

- Testing onboarding interventions with small cohorts
- Piloting automation with 50 users instead of 5,000
- Measuring activation shifts in weeks, not quarters

Bigger Swings, Smarter Design

Owning retention and expansion doesn't mean taking reckless risks: It means taking smarter ones.

When you control the journey and build a digital layer, you can:

- Detect risk earlier
- Intervene and take action faster
- Personalize at scale (as long as data hygiene is in check)
- Identify expansion signals before a QBR

When you can identify all of these previously hidden signals, you also can start building a more proactive approach:

- Designing next-best-action journeys
- Tying academy progression to adoption thresholds
- Connecting community engagement to expansion readiness
- Using usage data to shape lifecycle plays

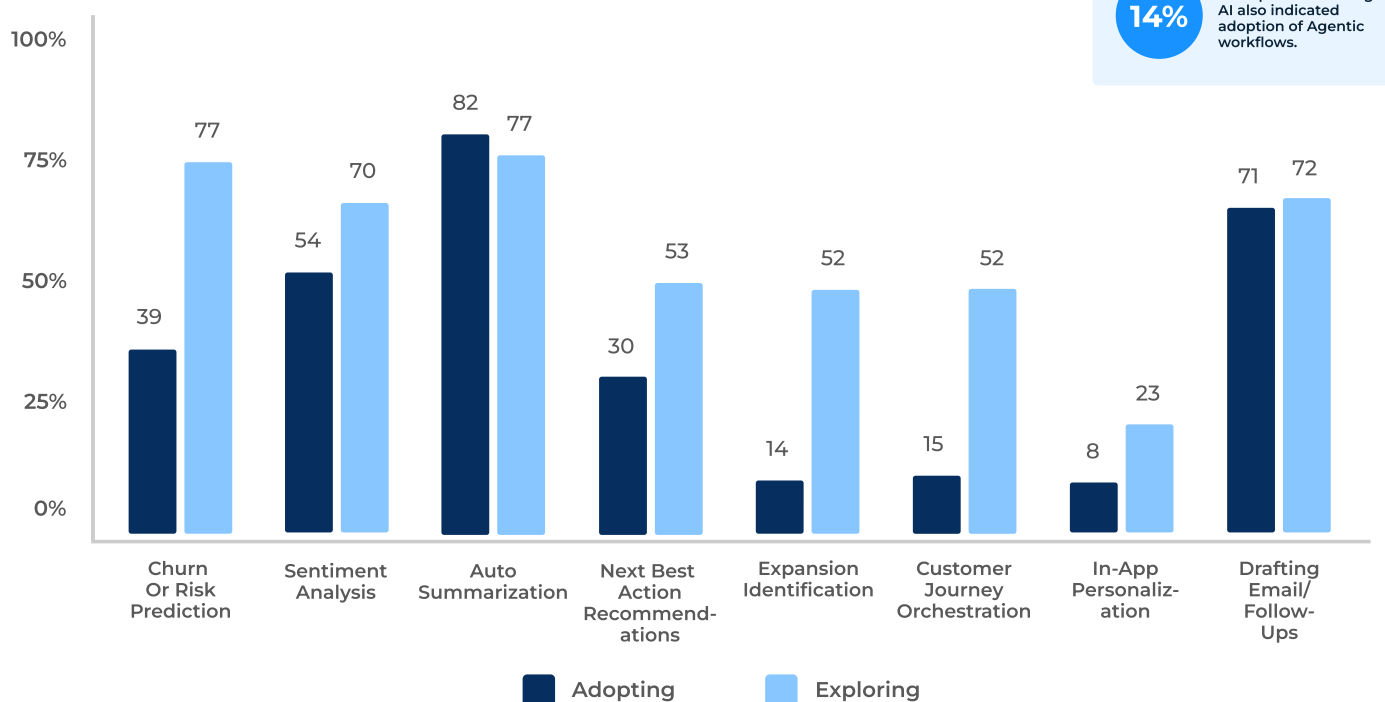
Rather than wait for outcomes to happen, you design toward them. And that shift, from passive measurement to active orchestration, is what truly separates digital as a "program" from digital as infrastructure.

From Experimentation to AI: Speed Requires Structure

If digital now owns real pieces of retention and expansion, and if experimentation becomes the new operating model, then the next logical question is: Can we just move faster? This is where AI enters the conversation.

The CS Index shows AI adoption rising, but still early. Most teams are experimenting yet few have AI deeply embedded across workflows.

AI Use Cases Adopting vs. Exploring



That slower movement actually makes sense because you can't move fast if your foundations are shaky. Despite best wishes, AI isn't a shortcut around messy data, fragmented content, or siloed systems.

It's an accelerant, and accelerants amplify whatever foundation exists. If your ecosystem is clean, AI amplifies clarity. If your ecosystem is fragmented, AI amplifies chaos.

That may explain why adoption is more cautious than the hype suggests as teams are realizing that before layering AI on top, they need to architect the backbone correctly.

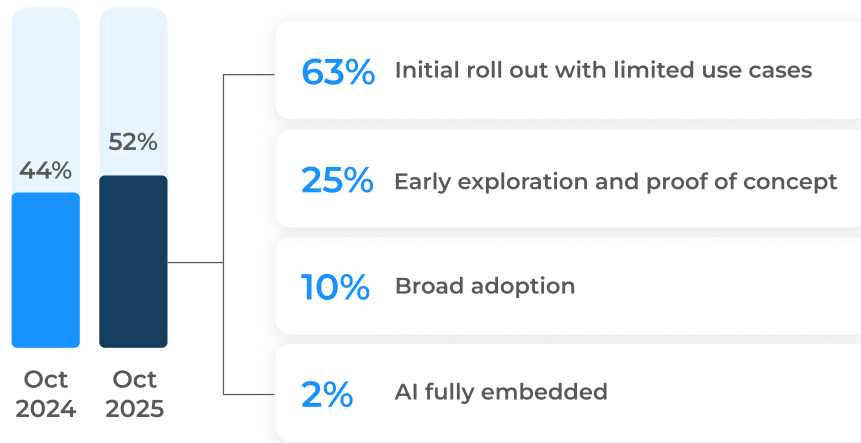


Erica Kuhl

GM & EVP, Digital Customer Hub,
Gainsight

“Start with a strong foundation: Most companies don’t have a content problem, but they have a structure and signal problem. Communities need to be easy for LLMs and AI systems to scan and to trust. That foundation comes from content written by humans using consistent, authoritative language with clear signals, such as well-maintained knowledge-base articles or product updates properly categorized so both customers and AI can quickly find reliable information.”

AI in Customer Success



You cannot scale Chaos

Think about what we’ve already established:

Digital

- owns meaningful portions of retention.
- influences expansion signals.
- runs experiments tied to leading indicators.
- unifies metrics across segments.

Now layer AI on top of that.

If your

- content is scattered across tools.
- taxonomy is inconsistent.
- academy, community, and in-product guidance operate independently.
- tagging is weak.
- data isn’t connected.

Just imagine the tangled web you’ve created for your customers (and LLMs).

How to Put Your Infrastructure To Work

Here's some quick tips to check yourself:

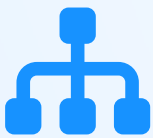


1. A Clean Source of Truth

Instead of disparate repositories, duplicated assets, or lost knowledge in Slack threads.

You need one governed system for:

Education content	Community knowledge	Product documentation	Lifecycle messaging
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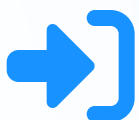
2. Structured Taxonomy and Signals

Content needs to be tagged by:

- Product area
- Lifecycle stage
- Feature depth
- Persona
- Job-to-be-done
- Activation milestone

And those tags should connect to real behavioral signals:

- Feature usage
- Adoption thresholds
- Workflow progression
- Health score changes



3. Orchestrated Journey Logic

AI can't determine "next best action" if you haven't defined it.

Before automation, you should clarify:

- What are the critical moments in the journey?
- What signals determine risk or readiness?
- What qualifies as progression?
- What action moves a customer forward?

The Convergence: Infrastructure, Experimentation, and Intelligent Acceleration

If you zoom out, what the data and the operator experience both reveal is convergence.

- **Digital investment is rising.**
- **Revenue accountability is expanding.**
- **AI expectations are accelerating.**
- **Retention pressure is intensifying.**

These forces are not separate trends, but a cross-over of markets, mindsets, and models that set the digital success moment up to shine.

And if we were to leave you with three parting “abridged” pieces of advice? Here’s what to keep your eyes on in 2026:

- ✓ Digital Customer Success is no longer a supporting program; it’s the infrastructure that underpins retention, expansion, and the entire customer experience.
- ✓ Owning that infrastructure means shifting from proving outputs to engineering outcomes through intentional experimentation and shared accountability.
- ✓ And as AI accelerates, your impact will depend not on how fast you move, but on how well you’ve structured, governed, and connected the ecosystem beneath it.

ABOUT GAINSIGHT

Gainsight empowers businesses to drive durable growth with customer-led, product-led, and community-led strategies. Trusted by leaders like GE Digital, SAP Concur, and Box, Gainsight helps scale efficiently, boost adoption, prevent churn, and grow through renewals and expansion.

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