

Customer Success Strategy Canvas

Design your entire Customer Success strategy — operating model, segments, motions, KPIs, governance, and priorities, all in one place.

BEST FOR
CS Leaders

TIME
60–90 min

FORMAT
Workshop

1 Business Vision

Where is the business heading? What outcomes matter most to leadership.

2 Customer Vision

What does success look like from the customer's point of view?

3 Customer Journey

Key stages and moments customers move through with you.

4 Customer Segmentation

How are customers grouped, and what does each segment need?

5 Success Motions

The playbooks and touchpoints that drive customers to value at each stage.

6 Success Metrics

The KPIs that prove the strategy is working — leading and lagging.

7 Strategic Risks

What could derail this strategy, internally or externally?

8 Growth Opportunities

Where is there room to expand value with existing customers?

9 90-Day Priorities

The handful of things that matter most over the next quarter.

10 Governance & Ownership

Who owns what, and how progress gets reviewed and decided.

Customer Journey Canvas

Map every stage of the customer lifecycle to find friction points and align on the moments that matter most.

BEST FOR
CS, Product, Sales

TIME
60 min

FORMAT
Workshop

Acquire	Onboard	Adopt	Realise Value	Renew	Expand	Advocate
CUSTOMER GOAL	CUSTOMER GOAL	CUSTOMER GOAL	CUSTOMER GOAL	CUSTOMER GOAL	CUSTOMER GOAL	CUSTOMER GOAL
DESIRED OUTCOME	DESIRED OUTCOME	DESIRED OUTCOME	DESIRED OUTCOME	DESIRED OUTCOME	DESIRED OUTCOME	DESIRED OUTCOME
TEAM ACTIVITIES	TEAM ACTIVITIES	TEAM ACTIVITIES	TEAM ACTIVITIES	TEAM ACTIVITIES	TEAM ACTIVITIES	TEAM ACTIVITIES
SUCCESS METRICS	SUCCESS METRICS	SUCCESS METRICS	SUCCESS METRICS	SUCCESS METRICS	SUCCESS METRICS	SUCCESS METRICS
RISKS	RISKS	RISKS	RISKS	RISKS	RISKS	RISKS
OPPORTUNITIES	OPPORTUNITIES	OPPORTUNITIES	OPPORTUNITIES	OPPORTUNITIES	OPPORTUNITIES	OPPORTUNITIES