

Leadership Onboarding Guide for Customer Success Managers

This comprehensive guide is designed to provide a structured approach for the first 90 days in your role as a Customer Success (CS) Leader. This guide will help you quickly understand the key aspects of your company, client base, product/services, organizational collaboration, and team dynamics. By following this structured approach, you will be able to accelerate your ramp-up period, effectively contribute to your organization, and lead your team toward achieving key goals.

Company

- Understand the company's mission, vision, and strategic goals.
- Review the company's history, market position, and competitive landscape.
- Analyze the company's financial health: revenue, profit margins, growth rates.
- Understand the revenue targets for each of the next 5 years.
- What is the revenue split from new customers, upsell/cross-sell, etc.
- Assess the organizational structure: departments, hierarchies, and key decision-makers.
- Identify internal processes and workflows impacting Customer Success.
- Evaluate the company's technology stack and its integration with Customer Success tools.
- Understand the company's approach to innovation, adaptation, and change management.
- Identify if the Customer Success team has an established P&L

Client Base

- Analyze the size and revenue structure of the current customer base.
- Understand the current client segmentation and criteria.
- Determine the average contract length and value.
- Calculate the customer acquisition cost and break-even point.
- Review current renewal rates and churn rates.
- Review and understand the Ideal Customer Profile (ICP).
- Assess how well the current customer base aligns with the ICP.
- Review the customer journey map (by segment) and identify any gaps.
- Analyze customer feedback, channels, and satisfaction levels.
- Determine the effectiveness of current customer communication channels.
- How does the client base vary across different geographies or markets?
- Are there any notable case studies or success stories of current clients?

Product/Services

- Gain a comprehensive understanding of the product/service offerings.
- Review the unique selling propositions of the products/services.
- Assess the balance between self-service features and those requiring assistance.
- Understand the product roadmap, upcoming features or services, and communication of roadmap and releases to customers.
- Review current product training materials and resources.
- Analyze product usage data to identify trends and areas for improvement.
- Evaluate the process for handling product feedback and improvements.
- Identify how and where product issues and defects are tracked and handled.
- How do customers perceive the strengths and weaknesses of our products/services?
- What are the most common use cases or applications of our products/services in various industries?
- How does the product/service evolve based on customer feedback and market trends?

Organizational Collaboration

- Schedule initial meetings with the various internal teams such as onboarding, sales, etc. to understand current areas of focus and areas of opportunity.
- Understand the role of Customer Success in the sales and onboarding process.
- Assess the effectiveness of current cross-departmental collaboration.
- Identify key stakeholders in other departments for collaboration.
- Evaluate the process for sharing customer insights across departments.
- Determine the level of support from leadership for Customer Success initiatives.

Team

- Assess the current structure and roles within the Customer Success team.
- Understand the career aspirations and skills of each team member.
- Evaluate the current level of team engagement and morale.
- Identify gaps in skills or resources within the team.
- Review current team processes and workflows.
- Assess the team's use of Customer Success tools and technologies
- Determine the effectiveness of current team communication and collaboration.
- Plan for team development and training needs.
- Establish a regular meeting and feedback rhythm within the team.
- What are the KPIs already in place?
- Develop a plan for scaling the team in line with company growth.