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How do you see the role of Customer Success evolving over the next few years?

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What does the future of Customer Success look like? And what will CS pros need to know in order to be ready for it?

We recently asked 30 experts from our **Success Network**, "How do you see the role of Customer Success evolving over the next few years?"

From the rise of AI tools to a growing focus on **revenue generation**, the insights below will help you prepare for what's coming.

I believe Customer Success will increasingly evolve into a role that demands deep industry expertise and strategic consultation.

As customers seek more tailored solutions, CSMs will need to position themselves as industry experts, capable of driving impactful, success-driven conversations.

The future of Customer Success lies in developing specialized knowledge and becoming trusted advisors who can guide customers through complex challenges with confidence.

JASMINE REYNOLDS
Flow Customer Success Manager at *Pluralsight*

A reliance on technology, automation, and specifically AI is going to be a critical shift all CS orgs need to make.

Specifically, scaled means of customer enablement and training that are less white glove will become the standard.

I also see the role of CSMs evolving to become much more technical in nature and be backed by strong CS Operations for the lower-hanging-fruit pieces of customer experience and engagement. Gone are the days of white glove onboarding and ongoing support for all customers. And for those that want an experience with more hands-on, they will need to pay for it more than they did in the past.

CADEN DUVE
Sr. Manager of Account Management at *Mosaic.tech*

I believe there is so much movement toward revenue generation for CSMs that SaaS organizations will again be in a place where churn will continue to creep up.

I think there is going to be a rebalancing for CSMs to focus more on the relationship and retention part of the customer journey while still working to contribute to revenue.

Unfortunately, trying to do both well only results in the revenue side taking priority (see the challenges of Account Managers). So, although new revenue will continue to grow in importance, the softer skills of relationship management will become even more important.

MIKE LEE
Manager of Customer Success at *Avalara*

A focused approach on digital engagement and digital CS — not that I'm biased.

Realistically, if you want to build a successful product, CS and Support need to be able to rely more on self-serve content and troubleshooting. Anecdotally, customers may even be able to resolve their questions and issues faster this way as well.

EMMA MILLER-CRIMM
Head of Digital Customer Success at *Level Home*

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The most significant shift we're already seeing — and will continue to see — is the transformation of Customer Success from a cost center to a revenue driver.

CS leaders will need to own a revenue number, whether that's through upselling, cross-selling, or reducing churn.

This requires a shift in strategy, mindset, skillset, and culture. CS professionals will need to be equipped with sales acumen, negotiation skills, and a deep understanding of the customer's business to identify and capitalize on growth opportunities.

ANGELINE GAVINO
Founder & CEO at *CS RevSpeak*

Customer Success will be more defined as an actual strategic partner that empowers the customer to truly grow their business and cut down costs where they can instead of a catch-all that is a mix of CS, onboarding, and technical support.

LAURA BEDOYA
Senior Manager, Technical Support at *Vitally*

Customer Success has been more revenue-focused over the past few years compared to before, which is a great move that I've always believed in.

Since I started my career in Account Management I've always felt that CS should own a number. CS should constantly find ways to add business value to our customers and that all drives revenue.

MARK STAGI
VP of Customer Success at *Avoma*

Customer Success already looks drastically different from the 2016-2020 era of high VC-backed teams.

CS leaders won't be asked to do 'more with less,' but they will be challenged to do 'better with different.' Some of those differences: less headcount, a focus on Net Dollar Retention, and embracing new technology to power scale.

ASHLEY STAMPS-LAFONT
Principal at *The Success Rx*

Customer Success teams will increasingly be moved under the Marketing organization to both
provide more direct access to customer perceptions and to oversee company-wide analytics on product usage, acceptance, and hindrances.

KURT UHLIR
Chief Marketing Officer at *ez Home Search*

In the coming years, I see the role of Customer Success Managers (CSMs) evolving differently depending on the company's lifecycle stage and the size of its customer base.

For companies with large customers where a high-touch approach is required, I predict that the CSM role will remain mostly unchanged. However, I expect these CSMs to increasingly lean into data-driven decision-making and integrate AI technologies to enhance their effectiveness and productivity. This shift will enable them to provide more insightful, proactive recommendations, ultimately driving faster adoption and greater value for their assigned customers.

For young companies with a long-tail customer base, the evolution of the role will likely take a different path. Companies with fewer resources may initially try to upskill their Support teams with Customer Success methodologies and Value Upselling playbooks. This approach might delay the hiring of a dedicated CS team as they attempt to manage both Support and Success functions with limited resources.

In contrast, more established companies will likely need to adopt more specialized roles to handle their long-tail customer base. Two possible models could emerge as the predominant approach: a pooled or a portfolio CS model. The pooled model involves a CSM team sharing customer management responsibilities, providing outreach on an ad-hoc basis. The portfolio CSM approach, however, leverages dynamic segmentation to assign specific groups of customers to individual CSMs, allowing for more focused and localized engagement combining personal outreach with consistent one-to-many touchpoints.

Personally, I believe the portfolio CSM model offers a more tailored and effective approach compared to the pooled model. Unfortunately, many companies are still unfamiliar with this engagement model, so broader adoption may take some time.

IRIT EIZIPS
Chief Executive Officer & CCO at *CSM Practice*

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In this era of profitable growth, Customer Success will need to have commercial responsibilities and targets, including retention and contribution to — though not necessarily ownership of — expansion.

Segmentation is less likely to be focused on company size but rather commercial risk and opportunity, as determined by data and AI. CSMs will be proactive based on information provided to them, rather than operating so much on instinct.

Hopefully the alignment around this data and the subsequent suggested actions will help drive more customer-centricity in organizations, since everyone in the business could have access to the information instead of so much living in the CS team's heads.

LAURA KIGHTLINGER
Freelance VP of Customer Success

I see Customer Success becoming a bigger blend between implementation, adoption, and account management.

The CS Manager will become more empowered to really own the customer from start to ongoing. This is a high-demand relationship for SaaS companies as the focus will become shifted more toward revenue and customer retention. As a result, more ammo is needed in proper implementation, which drives better (and quicker) adoption, ultimately resulting in renewals.

ED PORTER
Owner/Fractional CRO at *Blue Chip CRO*

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The transition has already begun, as Customer Success professionals have been further legitimizing their role to their company leadership for years.

Customer Success professionals are often given or take on many roles outside of customer relationship management, including marketing efforts, prospecting, and sales responsibilities. To improve customer metrics and customer satisfaction, the ever-evolving Customer Success professional needs to shed those extra responsibilities and pour more time and attention into being a consultant for the customer account that they manage.

Success requires a three-pronged approach. Being an expert in your field or industry builds an ethos and gets your customers to trust your opinions. Caring about your customers' success metrics as if they were your own builds pathos and demonstrates your concern for the client. Data is your appeal to logos and the key to positioning the CSM as the trustworthy link between your organization and theirs.

DAVID BARNES
Global Customer Success Manager at *Giftpack.ai*

Customer Success can only become a more powerful tool. As AI gets bigger, human touch becomes more valuable and that's where we have chances to make a huge impact.

CAIRO AMANI
Head of Customer Experience at *Sunnyside*

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I see CS evolving in two ways:

1. CS — like every function — will use AI-powered tools to analyze customer data, scale our organizations without adding more people and complexity, and become more efficient and customer-centric in our approach to our business. Those who lag behind on this will not be market leaders.

2. CS is unique in that it is located at the intersection between the customer and the company. How we understand business economics and goals for our customers helps us to help them achieve their goals. And in turn, when our customers achieve their business goals, they are more likely to renew and expand their business with us, which helps us guide our companies and achieve our business goals.

JAN YOUNG
Founder of *JanYoungCX*, *StepUpXchange*, and *CxXchange*

With the rise of AI and automated tasks, I can see the role of Customer Success being more data and commercially-driven.

Not that it wasn't the case before but our efficiency will be challenged and we need to be prepared to answer tough questions from our executives. It will be crucial for CS to capitalize on the things only humans can provide right now: a consultative approach enhanced with Emotional Intelligence.

ELODIE O'ROURKE
Global Customer Success Director at *Financial Times*

Customer Success is evolving at a very rapid pace. Gone are the days when Customer Success was viewed as glorified Support.

More and more CEOs and CROs are beginning to understand the crucial role of Customer Success is being a revenue generating arm of the company and not just a team that is responsible for churn.

I see more CS leaders carrying expansion targets, which by extension would mean that their CSMs are more revenue-forward and a bit more aggressive than before. This is not necessarily a bad thing. Once you have CSMs not just focusing on product adoption and enabling customers to get value from the product, but are also on the lookout to find opportunities within adjacent teams/group companies, they essentially are creating pipeline for the AMs to work on and close. In a sense, the CSM-AM model in the CS function could resemble the SDR-AE model in Sales, except that the CSM-AM model is not just responsible for retaining customers but also expanding them.

I envision more CS teams in the future having a revenue-forward CSM-AM team where one focuses on the customer's success with the product and looks out for expansion opportunities while the other is laser-focused on running a well-oiled renewal engine and closing inbound and outbound expansion opportunities. Very soon, the CS leader could have a revenue number that is almost equal to or even greater than a Sales leader.

RATHNA KUMAR
Director of Customer Success & Account Management at *Murf.ai*

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I see the role of Customer Success evolving much more toward a selling function.

The past several years have taught us that Customer Success doesn't fare well during downturns unless there's clear and obvious economic value in our roles. And there's no better way to show ROI of CS roles than by showing how well they bring in new revenue.

Many people default to saying AI will drive the future, but it's important to call out that AI is just a tool — a means to an end. But the tools matter less when the endgame itself is shifting. We're moving from owning customer health to becoming integral players in driving revenue.

I see Customer Success getting back in touch with its roots in Account Management. Time is a flat circle, and right now, the circle is pulling us back to the bottom line.

ROB ZAMBITO
Founder & CEO of *Success Scaled Consulting*

As the team doubles down on Scaled CS and Tech Touch motions, CSMs will continue to be tasked with providing high-quality service to increasingly larger books of business.

This will make it more important than ever that CSMs are nimble software navigators, as they'll need to expertly leverage their tech stack (and the automation it offers) to thrive in their role.

Additionally, I see CS taking on even tighter alignment with revenue goals and, therefore, having an increased focus on upsells and expansion.

TAYLOR PETTIFORD
Senior CSM at *Vitally*

Three words come to mind when I think of how Customer Success will continue to evolve: Scale, Artificial Intelligence, and CS Ops. Let me explain.

The idea of scale has been around for years, yet many enterprise organizations have a hesitancy towards truly investing in technology that allows them to help customers grow without the heavy cost of 1:1 interactions.

As the macro environment continues to evolve, the CS function will need to connect more closely with Product, Marketing and Support to enable product-led solutions, use in-app technology, and evolve customer-facing digital tools to not only help customers self-serve, but enable their Customer Success team to do more with what they have. Read: smaller, nimble teams.

The continued rise of AI tools will also help support and streamline other functions such as renewals in SMB/transactional customer segments, upsells, and even support new business coming in from chatbots or free-to-paid solutions.

Lastly, to support all of this I believe we will see a rise and larger investment in CS Ops functions to help keep all these tools and engagement models running seamlessly. We need teams to help our CSMs focus on and understand digital insights.

SARA BOCHINO
VP, Customer Success - Business Banking at **U.S. Bank**

I believe CSMs will have to not only drive revenue but be held accountable to revenue targets.

ANIKA ZUBAIR
Head of Customer Success at **Griffin**

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The reality is that our industry will inevitably need to embrace AI, which I see having a significant impact on Customer Success (CS) teams.

While strategic, human-led Customer Success will always be essential, I see a tremendous opportunity to enhance efficiency by thoughtfully integrating AI — emphasis on 'thoughtfully.'

This approach can help companies reach unmanaged customers in a more valuable way. Then, eventually, allowing AI and CS platforms to fully own the automation of data-driven deliverables for all customers. This shift will allow Customer Success Managers (CSMs) to be recognized even more as strategic consultants, focusing on adding true value to their customers' businesses.

STEPH TOWNES
Strategic CSM at *Vitally*

Roles within Customer Success will continue to become more specialized.

I see more CS teams owning 'a number' in the future — whether that number is CSQLs, Retention (GRR), or even Expansion (NRR).

DAVID ELLIN
Revenue Architect - Customer Success at *Winning by Design*

Customers now demand seamless experiences, and being reactive won't cut it. CS leaders must develop strategic thinking, process mapping, and the ability to tackle ambiguous problems head-on.

Most importantly, they'll need to communicate recommendations in a way that directly ties to customer value, strengthens the brand, and impacts the business.

The ability to speak to all levels — from product users to executives — means moving beyond just putting out fires. CSMs have always been essential to driving growth. Now it's time to recognize them as a profit center, not a cost center. With churn as the #1 growth killer, CS must lead the way in reshaping retention strategies.

ALYSSA NOLTE
CEO at *Turvue*

Customer Success Managers must develop new skills that enable them to consistently and predictably contribute to top-line revenue growth.

It doesn't mean they will become salespeople. However, they will be expected to identify, nurture, and in some cases, close expansion opportunities that drive additional value for existing customers.

This role evolution will demonstrate that Customer Success organizations have an even more critical and measurable impact on company results. New methodologies like the REACH Framework make it easy for CS teams to learn and apply the necessary skills.

ROD CHERKAS
CEO of *HelloCCO* and Author of *The Chief Customer Officer Playbook* and *REACH: A Framework for Driving Expansion Revenue from Your Existing Customers*

I see Customer Success evolving in three ways:

1. Many of the manual tasks we still do today will be automated such as data entry, customer communication, or finding reports.

2. Scaled Customer Success will be widely adopted across tech companies and only the top 1% of a company's customers will have a traditional dedicated CSM.

3. With Scaled Customer Success becoming more widely adopted we will see more specialized Customer Success roles come into the market that will be solely focused on just adoption, just expansion, or just retention, etc.

BEN OTTESEN
Senior Scaled Customer Success Manager at *Bill*

I believe CS teams will become increasingly more efficient by using AI tools and adopting automation.

I also think that advocacy and loyalty will become even more important.

ANA SILVA
Customer Experience Manager at *Ledgy*

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I see Customer Success increasingly demonstrating its necessity in an organization (with a seat at the table!) as technology and the use of AI matures.

The niche of our role and function is that a customer is partnered with a human, who can help collaborate and lead with both best practices of the product/services and understand the business outcomes needed by way of the relationship. AI tools, while not perfect, can help to give back time to the CS roles to invest that energy when needed.

It doesn't have to be every customer, but still the data shows customers want a personalized experience that is more than their name in an ongoing proactive email campaign. The relationship and human connection is where an efficient and effective meeting, for example, can change the outcome of an at-risk or behind customer to renewal or expansion.

I also see Professional Services/Education becoming more of a need than a want within the CS org as its own function, finally seeing the revenue impact and science behind how educating a customer is not equal to marketing to a customer, especially an existing one.

ANNIE STEFANO
Head of Education, Advisor at **Growth Molecules**

Customer Success will become more specialized with experts in risk mitigation, programs, content, consulting, etc.

SARAH STEINGRABER
Global Manager, CS at **Vitally**

AI is set to revolutionize Customer Success, not by replacing human effort, but by amplifying it in ways we've never seen before.

It will allow us to build digital strategies that streamline operations, reduce administrative burdens, and enable us to engage with more customers, more thoughtfully. With AI, we'll foster vibrant customer communities and deliver personalized experiences at scale.

However, the key to leveraging AI effectively is recognizing that it's not a replacement for human connection, but a tool that enhances it.

In this era of technological advancement, Emotional Intelligence (EQ) is more critical than ever. As we embrace AI, we must also cultivate the human skills that machines cannot replicate — self-awareness, empathy, and the ability to build trust. Relationships are the foundation of Customer Success, and without the ability to relate and empathize, we will struggle to maintain meaningful connections.

EQ empowers us to understand who we are, identify the environments in which we thrive, and develop the skills necessary to be truly empathetic. It helps us build trust, foster emotional safety, and lead with transparency — qualities that will be essential as industries look to CS to lead in customer relationships.

By integrating AI and prioritizing EQ, Customer Success will no longer be viewed as a 'catch-all' department. Instead, it will become a powerful, revenue-generating engine. The future of CS lies in balancing technology with humanity, ensuring that AI enhances — but never overshadows — the human element at the heart of customer relationships. I'm excited about the future, where AI will enhance our efficiency, and EQ will deepen the customer experience.

JENELLE FRIDAY
VP of Customer Success at *Forecastable*, Principal EQ Consultant at *LionHeartCS*

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Vitally earned G2's "Best Results" award for CSP solutions for four straight quarters and is used by over 500 CS teams around the world. Visit **vitally.io** to learn more, or **follow Vitally on LinkedIn**.

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