

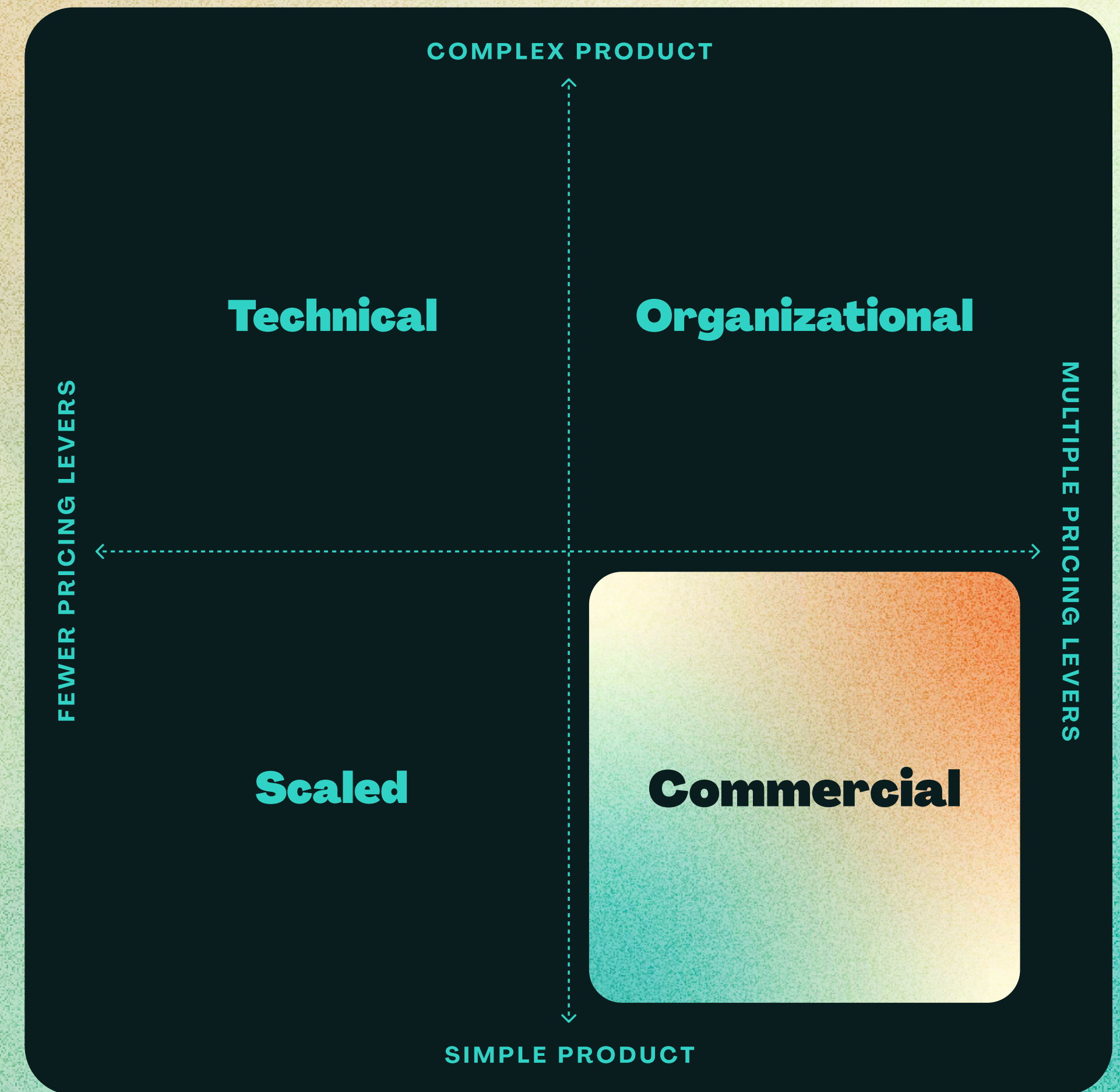
Your Ideal CS Team Structure:

COMMERCIAL

A streamlined product offering with a dynamic pricing model built to allow for growth requires the CS organization to focus on optimizing for expansion opportunities. Value still needs to be proven by your team, but if it's obvious, there will be ample upside from a revenue perspective.

What You'll Need:

- Onboarding specialists at scale
- Scaled book-of-business managers
- Seasoned revenue owners



Areas of Specialization

Companies following a Commercial CS model often rely on a simplified and templated approach to onboarding that scales while ensuring CSMs or AMs have the time and resources to act on risk and opportunity. Allocate the majority of headcount and resources to find and enable commercially minded relationship managers to close renewals, increase purchased SKUs, and expand into other teams.

Goals & Metrics

NRR and TTV are consistent goals for any CS organization regardless of structure, but tracking a layer beneath that will also be important.

For example:

- Expansion and contraction rates
- How many accounts achieved baseline TTV metrics
- Forecast accuracy

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How CSMs Should Relate to Customers

Required Operating Rhythm

Your operating rhythm defines how, when, and why your CS team engages with customers. It can include everything from the specific roles of team members, how responsibilities are distributed, which activities the team needs to execute, and how goals are measured. For Commercial CS, we recommend:

- **Onboarding:** We suggest a templated approach to onboarding, ideally a single call to go from nothing to a completed setup in one meeting.
- **Adoption:** While adoption is still important to track and monitor, it's less of a time constraint for Commercial CS teams. Take a content-led approach that surfaces critical use cases to end users throughout the adoption stage and allows CSMs to focus on expansion opportunities or risk indicators surfaced through usage metrics.
- **Growth:** Focus on the buying team's decision-makers to ensure they have a detailed understanding of the value, outcomes, and ROI received from the tool and a high-level understanding of the next level that can realistically be achieved in the next six months if the buyer expands to another product offering or plan type. Your relationship and commercial experts will be leading the charge here.

Required Programming to Support Customers

Product education, use cases, and thought leadership should be primarily driven by your content and programs. Finding ways to make ROI obvious and non-ignorable — asynchronously and at scale — is critical.

Typical Persona Hurdles to Be Aware Of:

- Disparate teams with many different stakeholders.
- End-user teams that don't have the same vested interest in the success of the product as the vendor or the buying committee.
- Executives that will meticulously analyze ROI and nickel-and-dime your team.

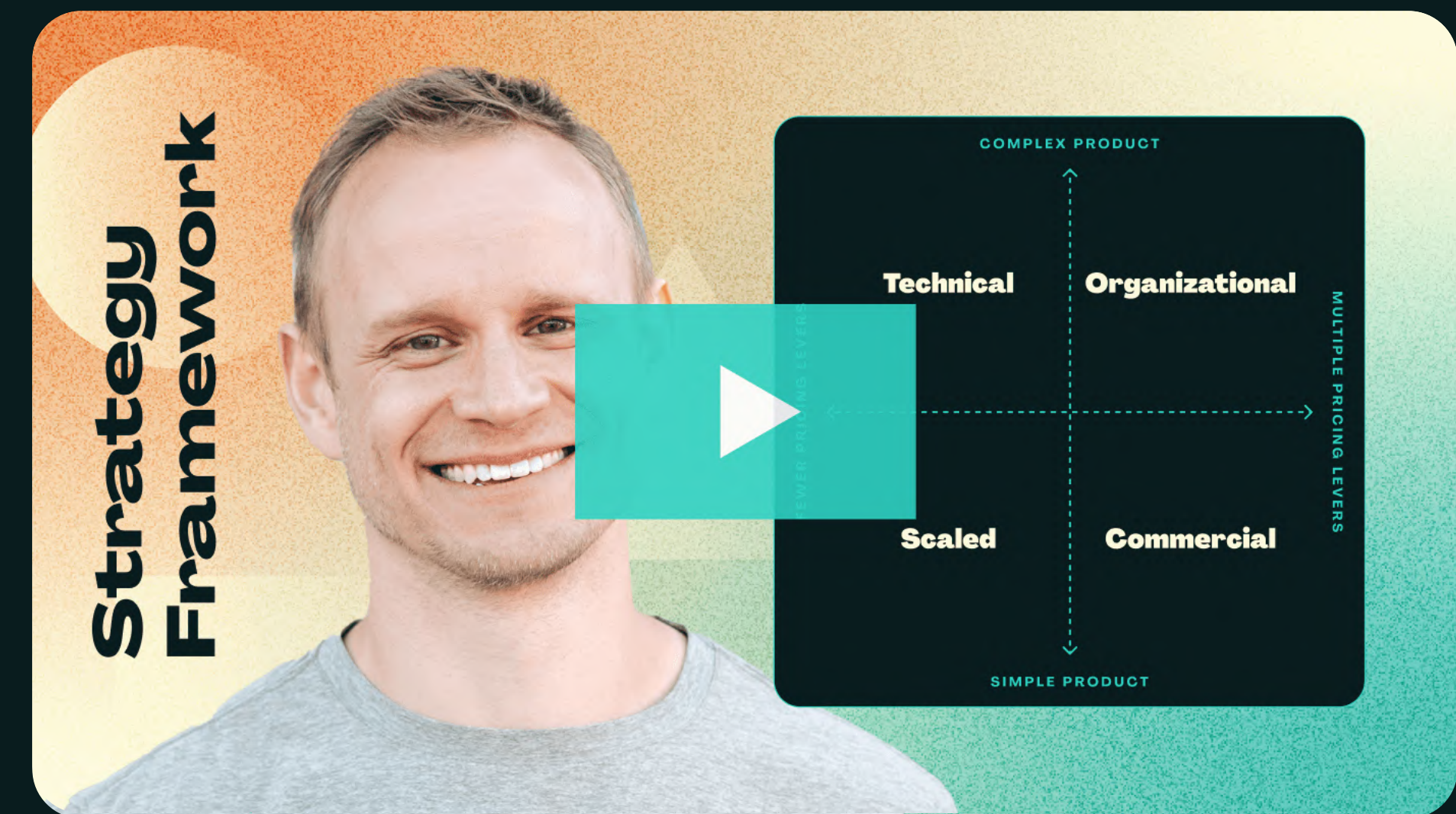
Guidance & Action Items

Commercial CS Summary

- **Team Makeup:** Commercially focused individuals will make up most of the customer-facing team.
- **Customer Profile:** Potential for many stakeholders spread across many teams, posing greater upside and risk.
- **Engagement & Process:** Distribution of use cases and thought leadership at scale will allow for more strategic use of time to prove value, capture revenue opportunities, and drive expansion.

Next Steps

Based on the findings, we recommend conducting a resource audit to account for what skill sets you have on the team, where any gaps are, how time is being allocated, and how much bandwidth is available.



Once you have completed that, you can put pen to paper to begin fleshing out your CS process. To aid in this, please watch our [“CS Strategy Framework” video](#), which takes the core pillars of a sound CS process and guides you through documenting what your company’s strategy should look like.