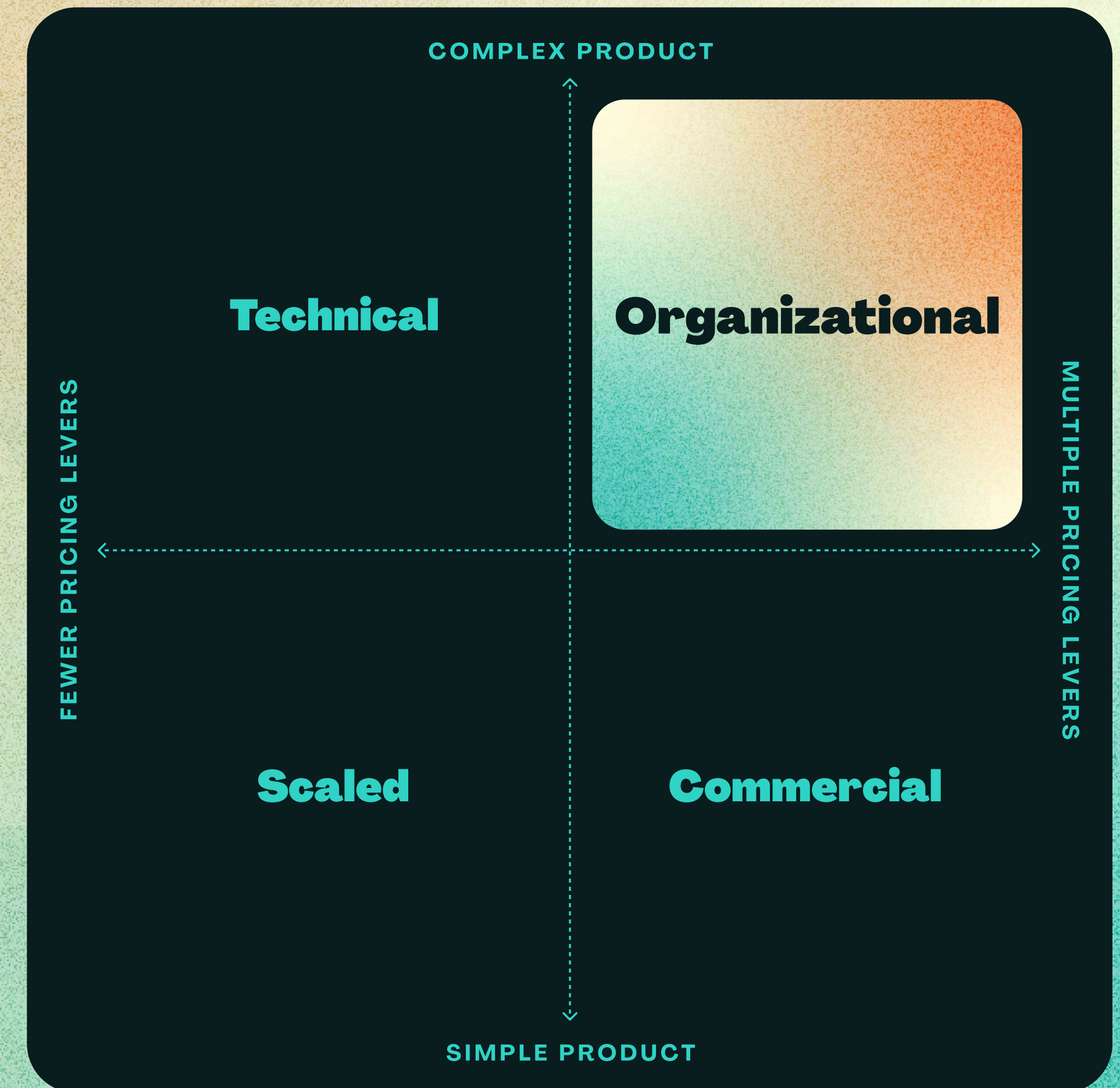# Your Ideal
CS Team Structure:

ORGANIZATIONAL

A complex product offering coupled with a pricing model built to allow for growth calls for a comprehensive and robust approach to Customer Success. Don't confuse this with simply being high-touch. To maximize customer outcomes and business value with this profile, you must ensure successful technical implementations for customers while acting upon revenue opportunities.

What You'll Need:

- Technical product experts
- Skilled educators
- Capable project and change managers
- Seasoned revenue owners

Vitally LABS

COMPLEX PRODUCT

FEWER PRICING LEVERS

MULTIPLE PRICING LEVERS

Technical

Organizational

Scaled

Commercial

SIMPLE PRODUCT

Areas of Specialization

We often see Customer Success teams divide onboarding, ongoing management, and revenue ownership into three functions, as hiring and scaling headcount is challenging to nail for each of these skill sets.

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:

- Number of technical touchpoints required for setup.

- Persona-based championing (as measured by % of accounts that have a key persona target and champion) to ensure that stakeholders are accurately targeted, consistently engaged, and successfully turned into champions. Often, the complexity of the CS team will mirror the complexity of the customer personas that need to receive value and see tangible ROI.

- Expansion and contraction rates.

Ready to Launch Your New CS Process?

Schedule a personalized demo of Vitally today to see how our all-in-one Customer Success Platform can make your new CS process a reality.

Request a Demo

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 Organizational CS, we recommend:

- **Onboarding:** Employ hands-on, technical onboarding that ensures admins and operational owners have properly integrated and configured the platform. Allow your onboarding team and technical product experts to take center stage.

- **Adoption:** Broaden the scope to end-user education and activation through use-case enablement. Your change managers should seek to get the entire intended audience capable and efficient with your product, focusing on quality-of-life improvements. Consider operational syncs and power-user shadow sessions.

- **Growth:** Narrow the focus again and zero in 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

Reps should drive product education, use cases, and thought leadership, but messaging should be consistent across reps and supplemented with content throughout each stage.

Typical Persona Hurdles to Be Aware Of:

- Technical buyer personas that will challenge a team's technical chops.

- Large 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

Organizational CS Summary

- **Team Makeup:** A wide range of skills and expertise is required to drive customer value.

- **Customer Profile:** Multiple personas to demonstrate and prove value to.

- **Engagement & Process:** High usage of human capital that is supplemented with persona and stage-appropriate thought leadership, product education, and use-case content.

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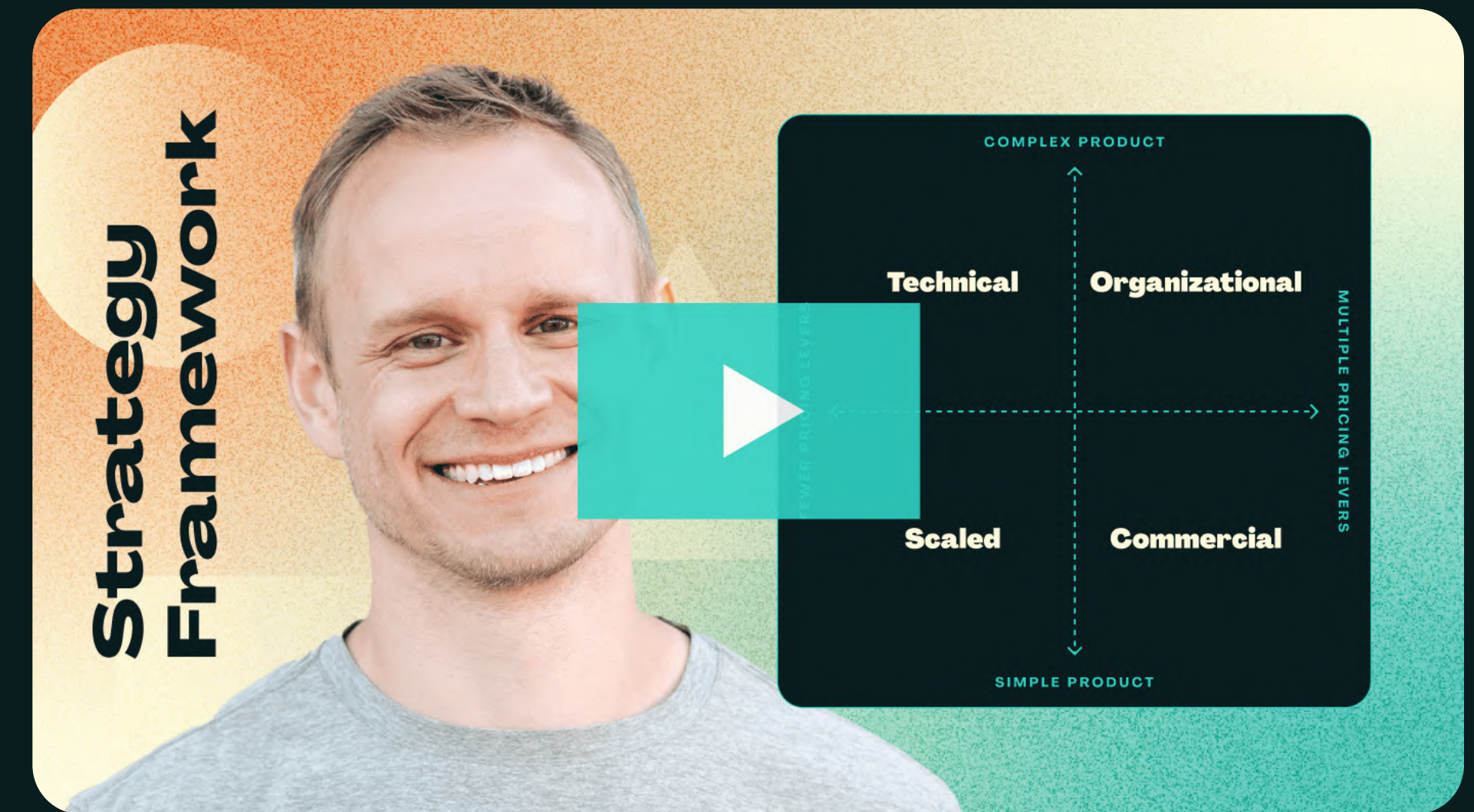
Once you have completed that, you can put pen to paper to begin fleshing out your CS process. To aid in this, please watch our **"CS Strategy Framework" video**, which takes the core pillars of a sound CS process and guides you through documenting what your company's strategy should look like.