

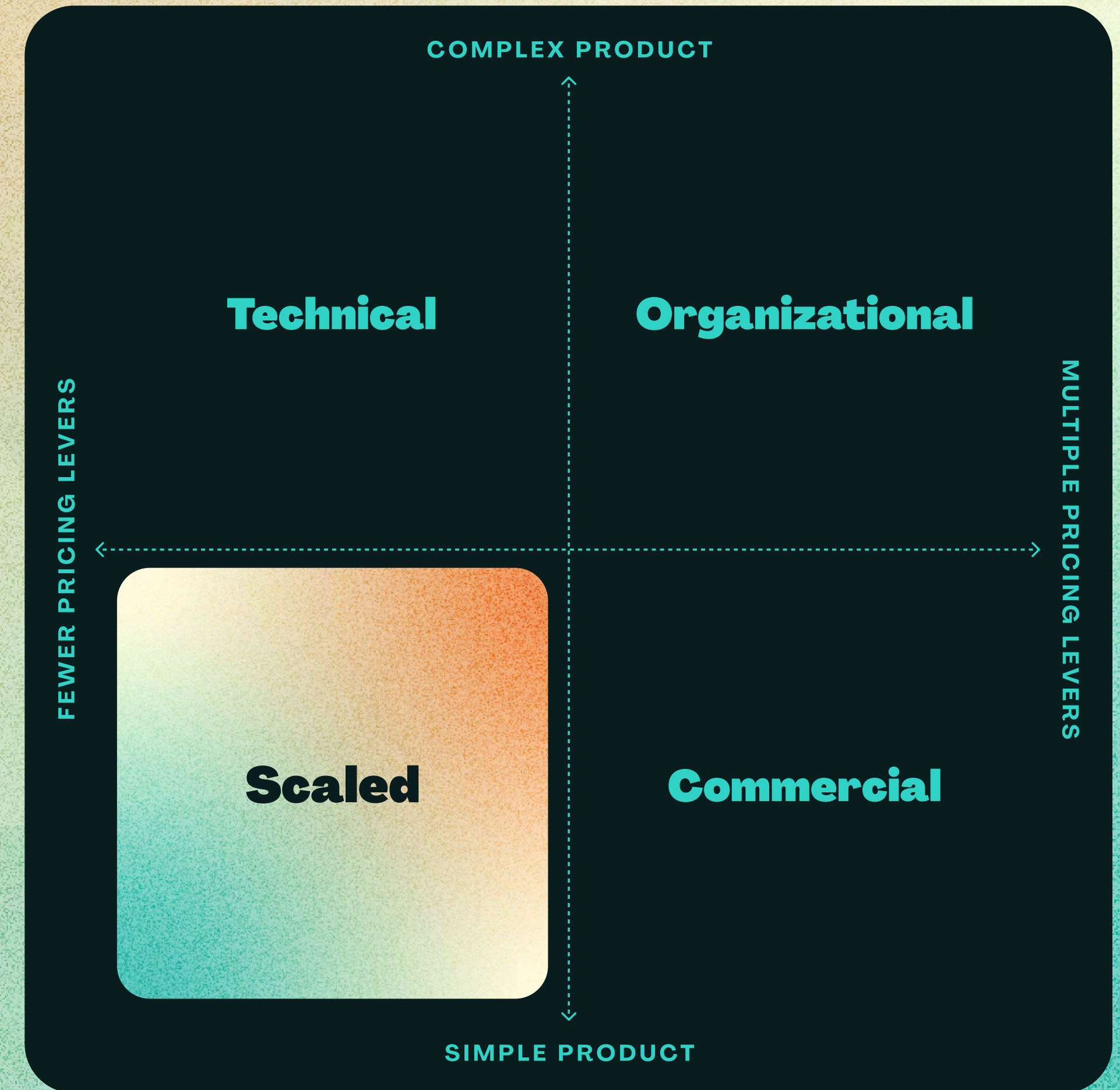
Your Ideal CS Team Structure:

SCALED

A streamlined product offering with a simple pricing model calls for a scaled approach to CS. It doesn't make sense to chase upsells or over-index on high-touch onboarding since the product and pricing don't require it. Value needs to be delivered and demonstrated at scale to improve business outcomes.

What You'll Need:

- A focus on operations and process
- Program managers
- Scaled book-of-business managers



Areas of Specialization

There are two possible approaches here:

- **No specialization at all:** This is the traditional path to handling Scaled CS. Give a few reps a lot of accounts and allow them to allocate their time to risks that can be managed and opportunities that can be pursued.
- **Unique specialization outside of traditional CSMs:** Companies that follow this “new-age” path look to create content, run programs, handle commercials, and act on risk, all within the CS organization. Identify unique skill sets and deploy those skill sets on the right accounts at the right time to drive impact and efficiency.

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:

- How many accounts achieved baseline TTV metrics
- Program delivery and impact, as measured by how many of the programs were consumed and whether they achieved the desired impact

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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 Scaled CS, we recommend:

- **Onboarding:** A templated approach to onboarding (ideally a packaged single call to go from nothing to completed setup in one go) that is done in group settings or is available on demand.
- **Adoption:** While adoption is still important to track and monitor, it is less of a time constraint for Scaled 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 risk indicators surfaced through usage metrics.
- **Growth:** If the product is elegant and the pricing model is simple, ensure that customer ROI is also obvious. Team members will not likely spend hours negotiating renewals or conducting in-depth business reviews. Still, it is critical to equip customers with hard data proving your solution's value, so enable your CSMs to aid in telling the ROI story.

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 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.
- A failure to achieve executive alignment throughout the term; this leads to executives who will meticulously analyze ROI and seek to lower the overall price at renewal — which can be difficult with limited pricing levers.

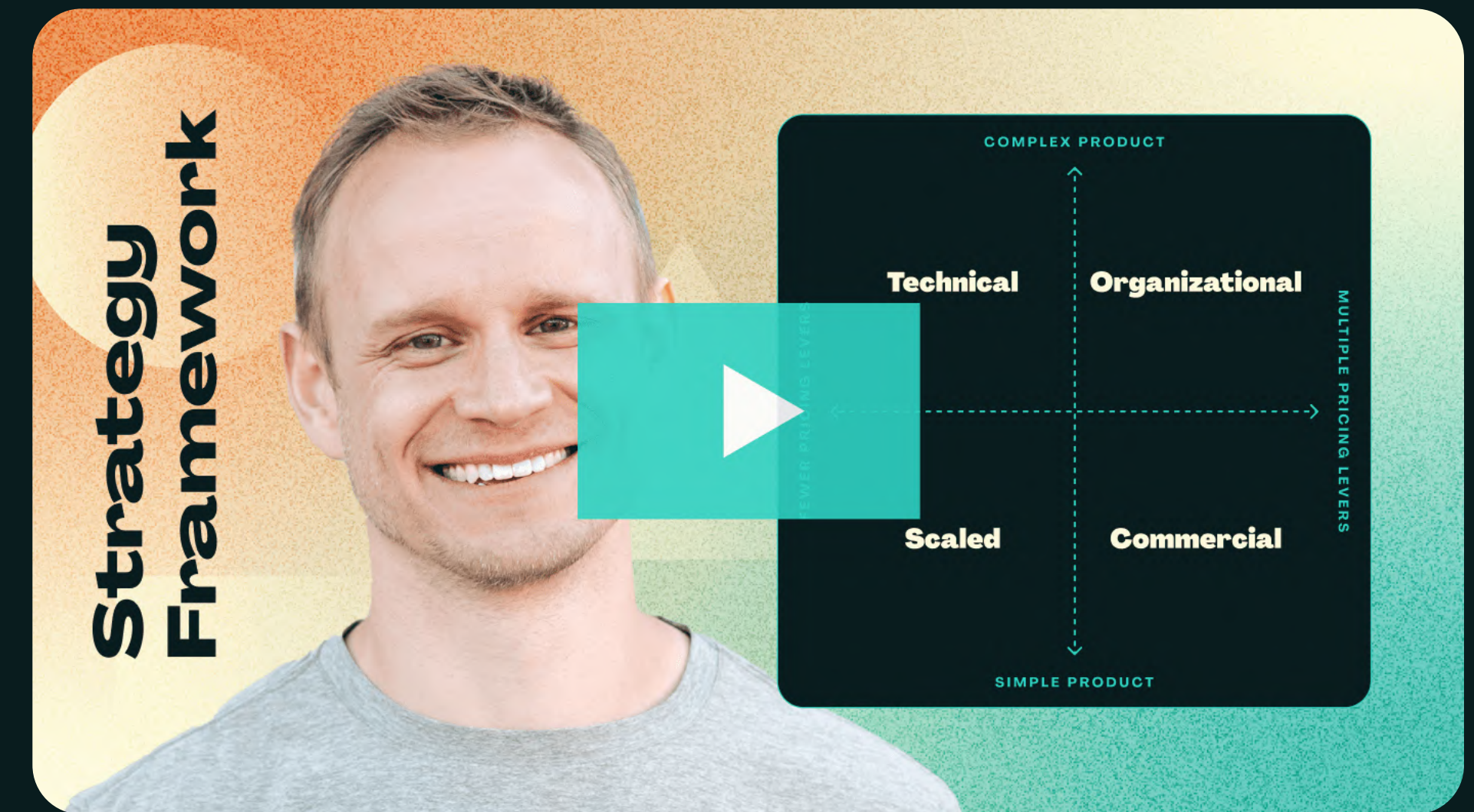
Guidance & Action Items

Scaled CS Summary

- **Team Makeup:** Invest in individuals experienced in managing a large volume of accounts or build a team of subject matter experts capable of driving efficiencies through their unique focus areas.
- **Customer Profile:** Multiple stakeholders spread across many teams, posing greater upside (more opportunities to drive expansion) as well as risk (more stakeholders with competing interests).
- **Engagement & Process:** Create content to drive progress throughout the customer journey and lean into automation to handle transactional items to scale this motion.

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.