

The Secret Lives of CSMs

How Customer Success Managers Really Feel About Money, Stress, Work, and Their Bosses



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Customer Success Managers are no strangers to anxiety. ✨

Being a CSM means serving as the empathetic, positive face of the company to your book of clients, even when you're feeling completely burnt out. It means carrying inflated NRR quotas and having to be reactive to demands from all directions, at all hours of the day.

Even in normal times, Customer Success is a tough racket. **And these are far from normal times.**

Recently, the B2B business world (particularly in the SaaS sector) has faced [economic turmoil](#) following a brief pandemic-induced boom. Acquiring new customers is now an uphill battle, which makes the roles of CSMs — who are responsible for preventing churn and maximizing the value of existing accounts — even more critical.

Despite this, Customer Success Managers have found themselves subject to increased scrutiny and layoffs during the current downturn, rather than greater appreciation. It's no wonder that **almost half of B2B CSMS say that the job has affected their sleep over the last six months** (see p.17).

In August and September 2023, [Vitally](#) surveyed 679 B2B Customer Success Managers in a variety of industries, to hear their candid opinions on the topics that all CSMs are thinking about right now but only discuss behind closed doors.

Salaries. Burnout. Secret job hunts. The love/hate relationship with the work itself. We wanted to know how CSMS live, how they work, and what keeps them up at night.

We also asked our survey respondents to anonymously answer two open-ended questions: **“What’s the one thing that would most improve your job satisfaction?”** and **“What do you wish you could tell your boss, but can’t?”** (You’ll see some of the answers scattered throughout this report.)

“The Secret Lives of CSMS” explores the unvoiced concerns and day-to-day experiences of today’s CSMS, with no sugar-coating whatsoever. Through original research and first-hand quotes, we aimed to present an in-depth understanding of the challenges, triumphs, and internal dialogues of B2B CSMS from their point of view.

And for the VPs of Customer Success or Chief Customer Officers who might be reading this: We hope this report sheds some light on the communication and process challenges that are preventing your CSMS from doing their best work. The following pages summarize what CSMS need right now — it’s up to leadership to give it to them.



Ben Goldstein

Director of Content Marketing @ Vitally



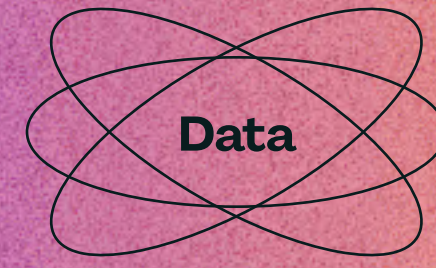
Part 01

Career and Compensation

“My job satisfaction depends on my success *with my customers*. I feel happy when I help them to be happy.”

Job Satisfaction

For most CSMs, the job is more than just work. **89% of our survey respondents** said they find genuine fulfillment in assisting their clients, proving that Customer Success is a role that's closely aligned with personal passion and a desire to help.



89%
of

respondents find genuine fulfillment in assisting their clients.

What do you wish you could tell your boss but can't?

“I feel stuck at my current level with no room for advancement.”

Career Aspirations

53% of CSMs say they aspire to become a VP of Customer Success, and **45%** say they aspire to become a Chief Customer Officer (CCO).

However, just over half of the CSMs who aspire to become a VP of Customer Success or CCO (**51%**) say there isn't a clear path into that role unless someone at the company vacates the position.

53%

of CSMs aspire to become a VP of Customer Success.

Salaries for CSMs

The average salary for our respondents was **\$74,942/year**.

35% of CSMs feel inadequately compensated for their work, highlighting a gap between their dedication and their compensation.

Millennials were 14% more likely to report feeling inadequately compensated, while **women were 32% more likely** than men to say the same.

44% of our survey respondents reported that they did not receive a raise or promotion within the past 12 months.

35%

of CSMs feel inadequately compensated for their work.

What's the one thing that would most improve your job satisfaction?

“Enough of a salary to properly take care of my family.”

“Being paid more. That's it. I want a wage that actually lets me live instead of barely coasting by.”

“Higher pay. I would be content with exactly the same conditions that I am under if I were being paid 15k more than I make now.”

What do you wish you could tell your boss but can't?

“It’s nice to be told that I am valued, but that doesn't pay the rent.”

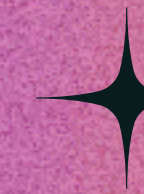
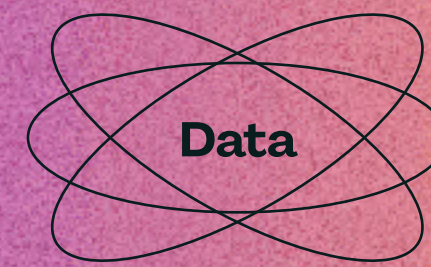
“If the company is profitable why can't we have raises equivalent to the executives?”

CSMs Hunting for Their Next Job

Unfortunately, passion alone doesn't pay the bills. So, it's no surprise that many CSMs are looking to explore new opportunities.

48% of CSMs say they're passively open to new job opportunities, while **23%** reported that they are actively looking for their next job.

By the way, **Gen Z respondents were 114% more likely** than Baby Boomer respondents to say that they're actively looking for their next gig while currently employed — adding some support to the stereotype that younger workers tend to job-hop.



448%
of

of CSMs are passively open to new job opportunities.

What do you wish you could tell your boss but can't?

“I love my job, but I feel overworked and undervalued and I'm looking elsewhere.”

“I'm leaving as soon as I find new employment.”

Among CSMS who are looking for their next job, money and career growth are primary motivators.

80% of CSMS who are actively seeking new job opportunities say that they're seeking higher compensation, while **49%** say they feel stuck in their current job.

Just 28% of the job-seeking CSMS in our survey say that they're looking to change jobs specifically to pursue a leadership role.

22% of CSMS who are actively seeking new job opportunities want to leave Customer Success altogether. CSMS with 11 or more years of experience were **41% more likely** to express this sentiment.

80%

of CSMS actively seeking new job opportunities are doing so due to a desire for higher pay.



Part 02

How Work Impacts Life For CSMs

“You won’t appreciate what your hardest workers do until they’re no longer here, and even then you’ll pretend they were replaceable.”

Quota Anxiety

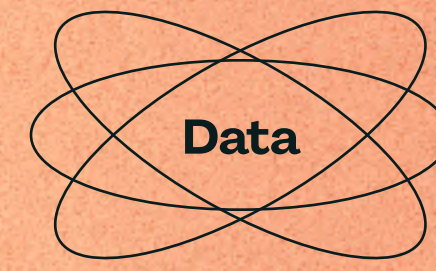
Every day, CSMs face a pressure to perform.

65% of CSMs carry a quota of some kind, whether it's revenue-based or activity-based. Of the CSMs who have quotas to meet, **61%** consider the pressure to achieve these quotas to be a major source of stress in their role.

76% of our survey respondents say that they worry about their job security at least occasionally, and among this group, **64% of CSMs** say they worry about job security regardless of whether they hit their quotas or not.

64%

of CSMs who worry about their job security do so regardless of whether they hit their quota.



76%

of

respondents worry about their job security at least occasionally.

What do you wish you could tell your boss but can't?

"I wish I could tell him that sometimes the quotas are impossible to make and it creates a more negative work environment."

"I would prefer to get rid of systems that are quotas in everything but name. It's stressful when I am expected to perform at a certain level of something that's not feasible given my current workload of clients."

What do you wish you could tell your boss but can't?

“The amount of work I have is insane,
it's **too much.**”

What do you wish you could tell your boss but can't?

"I think that everyone is burnt out and you need to do something quick to make it better."

"Mental health is important. You should check on your employees and stop overworking them."

Impacts on Health

CSMs dedicate themselves to others, which can have negative effects on their personal well-being. According to our research:

- **46% of CSMs** say their job has negatively impacted their sleep within the past six months.
- **39% of CSMs** say their job has negatively impacted their mental health within the past six months.
- **30% of CSMs** say their job has negatively impacted their physical health within the past six months.
- **47% of CSMs** reported experiencing burnout at their job at least sometimes, and of those respondents, **36%** reported experiencing burnout "often" or "constantly."

47%

of CSMs report experiencing burnout at their job.

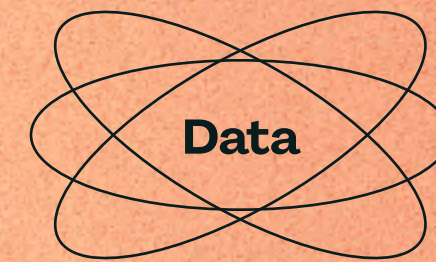
A Struggle to Disconnect

Despite the rigors of the job, the majority of CSMS have trouble making time for self-care, or keeping their work-life and home-life separate.

51% of CSMS say they sometimes feel guilty requesting time off from work, and **57% of our survey respondents** report working outside of business hours at least occasionally.

For the CSMS who clock in in the early morning or in the evening...

- The majority (**60%**) say it's primarily due to excessive workloads.
- **39%** cite team culture norms as the driving force, **38%** point to relentless demands from customers.



51%

of

CSMs sometimes feel guilty requesting time off from work.

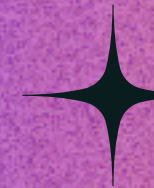
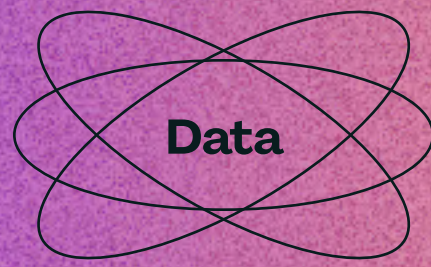
What's the one thing that would most improve your job satisfaction?

“A better system so that I don't feel obligated to work outside ‘normal’ business hours. I need a break.”

“Personal days built-in for mental wellness that are different than vacation days.”

What do you wish you could tell your boss but can't?

“I'm taking the vacation time. *Get over it.*”



54%

of

CSMs report checking their workspace platforms outside of working hours.

The Allure of the Work Chat

The “9-to-5” job is a thing of the past. Chat workspace tools like Slack and teams have made fully distributed work possible, but they also lead to an always-on dynamic that can keep CSMs in perpetual work-mode.

54% of CSMs report checking their chat workspace platforms outside of working hours — with those working in information technology and software services being **19% more likely** to say this — and **40% of CSMs** report checking chat workspace platforms even when they are on PTO.

Of the respondents who admitted keeping an eye on their work chat outside of business hours or while on PTO...

- **75%** do so to avoid missing important information from teammates.
- **67%** feel that they need to in order to keep up with their job.
- **11%** do it just for fun.

What do you wish you could tell your boss but can't?

“The constant contacting through work chat is not as helpful as he thinks it is.”

For more on how CS teams use chat workspace tools, read [The State of Knowledge Sharing in Customer Success Organizations 2025](#).



Part 03

Daily Struggles:

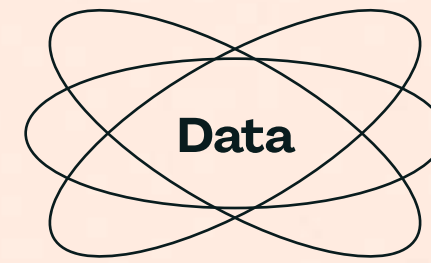
Communication, Collaboration, and Technology

Client Communication

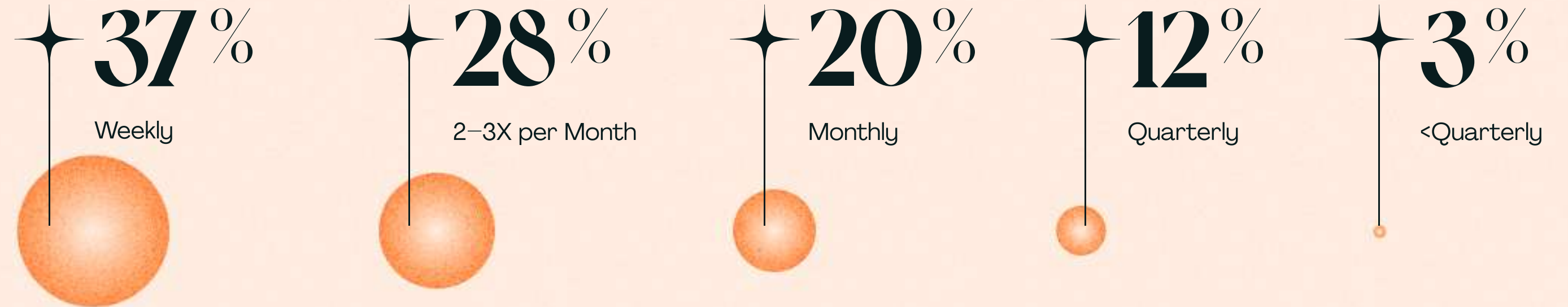
The majority of CSMS (65%) speak to each client in their book of business more than once a month.

However, **only 42% of CSMS** characterize their client relationships as highly collaborative, marked by mutual understanding and partnership.

Related: Learn how [Vitally Docs improves collaboration between CSMS and their clients](#)



How often do you speak to each client in your book of business?



How would you describe your relationship with most of your clients?



“I love my job. During the day I wish I had more time to take a breath and fully appreciate what we create for clients.”

What's the one thing that would most improve your job satisfaction?

“A smaller client-to-CSM ratio, and other teams being cross-trained to understand and avoid actions that might negatively impact our team.”

“I'd like it if I could work more on new accounts rather than maintaining existing ones, which feels mostly like running on an endless hamster wheel.”

What's the one thing that would most improve your job satisfaction?

“A lot of my stress and work comes from way too much paperwork and the organization of it. Convincing upper management about automating processes is difficult.”

The Weight of Admin Work

Although **63% of CSMs** wish they had more time to dedicate to client engagement, admin work takes up crucial bandwidth from a CSM's day.

66% of the CSMs we surveyed said they spend a significant portion of their working day on repetitive administrative processes.

63%

of CSMs wish they had more time to dedicate to client engagement

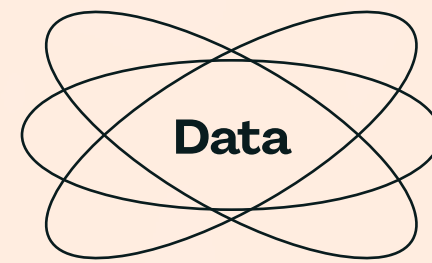
The Need for Automation

With time at such a premium for CSMs, eliminating low-impact tasks can have a big impact on productivity. While many CS teams already use a Customer Success Platform (CSP) to put certain customer communications and task reminders on autopilot, **72% of CSMs** say there are still parts of their job that they'd like to automate.

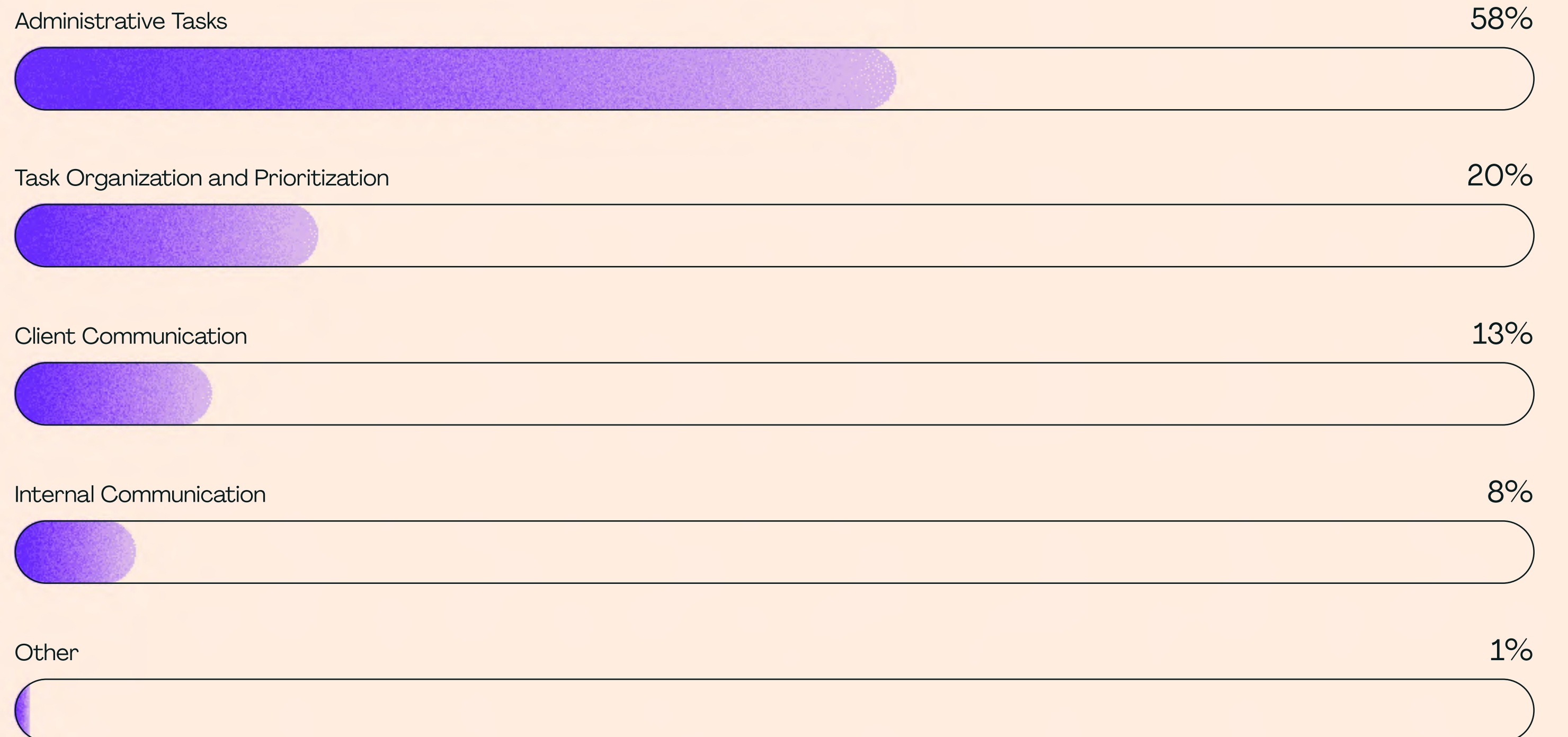
Further reading: [Four Customer Success Automations to Save Time and Boost Productivity](#)

72%

of CSMs say there are parts of their job they would like to automate.



What part of your job would you automate if you could?



What do you wish you could tell your boss but can't?

“That the costs of automation and digital transformation are worth it in the long run. But regardless of proof or factual evidence, it seems my boss doesn't agree with me.”

And what would CSMs do with all the time they saved by automating repetitive work? Well...

45% say automation would provide them more time to spend on personalized problem solving.

44% say automation would provide them more time to spend on in-depth client analysis.

44% say automation would allow for a greater ability to create exceptional customer experiences.

27% say automation would allow them to hit their quotas more consistently.

38% say automation would allow them to complete all work/quota activity during normal business hours.

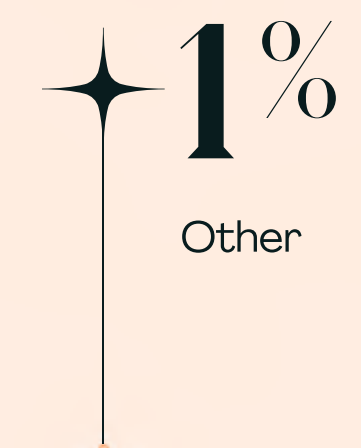
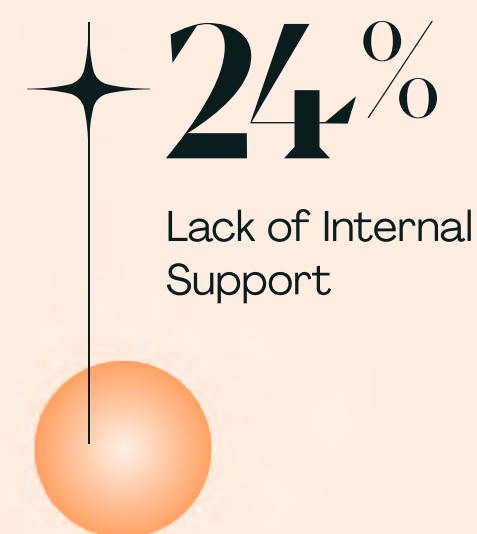
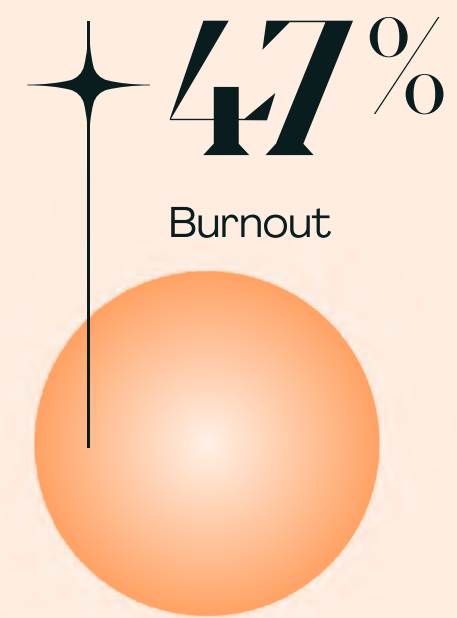
39% say automation would provide them more time to spend on identifying and/or capturing revenue opportunities.

What do you wish you could tell your boss but can't?

“Make it easier to automate tasks and stop making us jump through hoops by having to show every step when the end goal is all that’s taken into account for our quotas.”

Pain Points of the CSM Role

When we asked our survey respondents which challenges of their role they found to be the most difficult, burnout and client demands were most frequently cited:



Collaboration Challenges

Many CSMS are feeling siloed right now, and crave closer collaboration within their organizations. Of the CSMS who reported a lack of collaboration with other departments or functions:

56% wished they had a closer relationship with Operations.

28% wished they had a closer relationship with Support.

29% wished they had a closer relationship with IT.

29% wished they had a closer relationship with Marketing.

37% wished they had a closer relationship with Sales.

21% wished they had a closer relationship with Product/Engineering.

What's the one thing that would most improve your job satisfaction?

“If we could get all the departments to be able to all work together in a nice and friendly manner.”

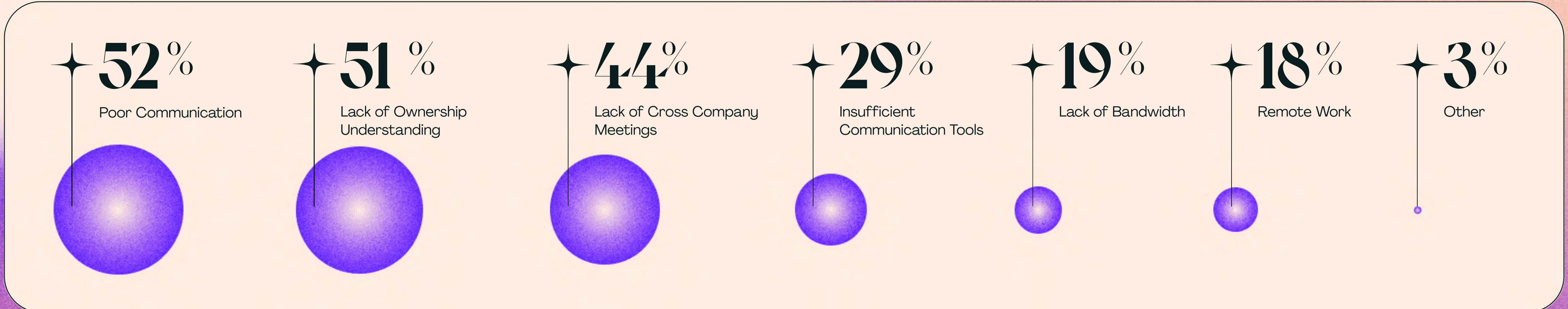
“More collaboration between departments across the team so we can run more efficiently.”

What do you wish you could tell your boss but can't?

“Sometimes I do not know the answer
and sometimes I do not know who to
ask for the answer.”

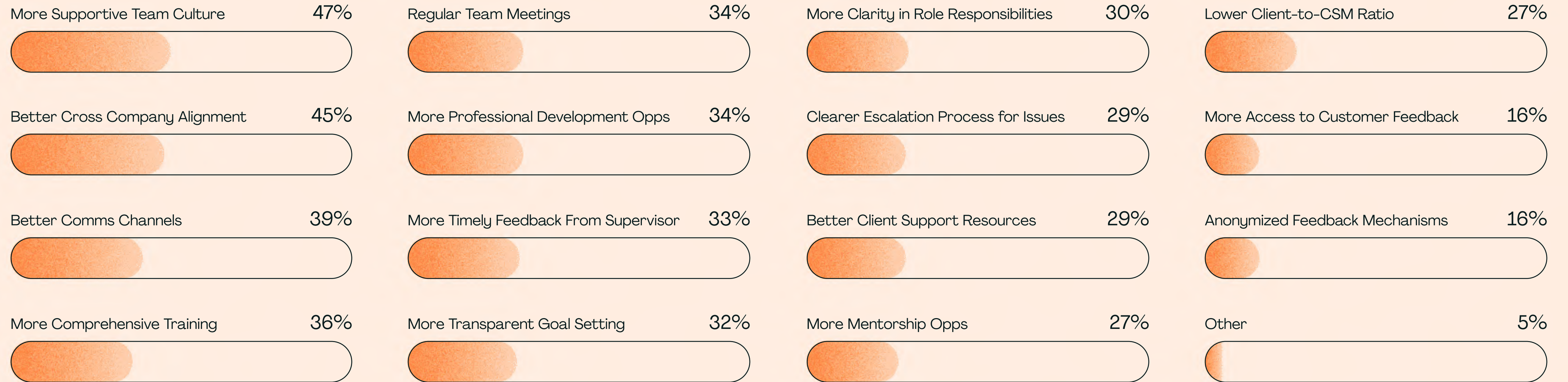
Collaboration Challenges, Ctd.

As for why CSMs experience a lack of collaboration between departments, our survey respondents chalked it up to failings in both culture and process. When asked to describe the reasons why they believed there was a lack of collaboration between departments and/or functions at their job, the participants responded as followed:



Where Internal Support Falls Short

Supporting your customers starts with supporting your CSMs. Of the survey respondents who said that “lack of internal support” was a pain point for their role, here’s what they said would make them feel more supported:



What's the one thing that would most improve your job satisfaction?

“I would be more satisfied with my job if there were more chances for professional development and training. This would not only help me improve my skills but also make me feel more valued as an employee.”

“The ability to rely on management to communicate and stick to what they say.”

What's the one thing that would most improve your job satisfaction?

“Respectful relationships and a sense
of psychological safety.”

What do you wish you could tell your boss but can't?

“I wish you'd just be honest with us all about what you think.”

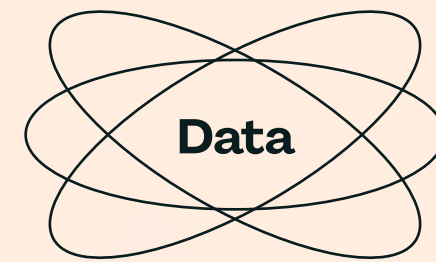
“I would like to have more autonomy and the ability to do things my own way without being micromanaged at times.”

Technology Challenges

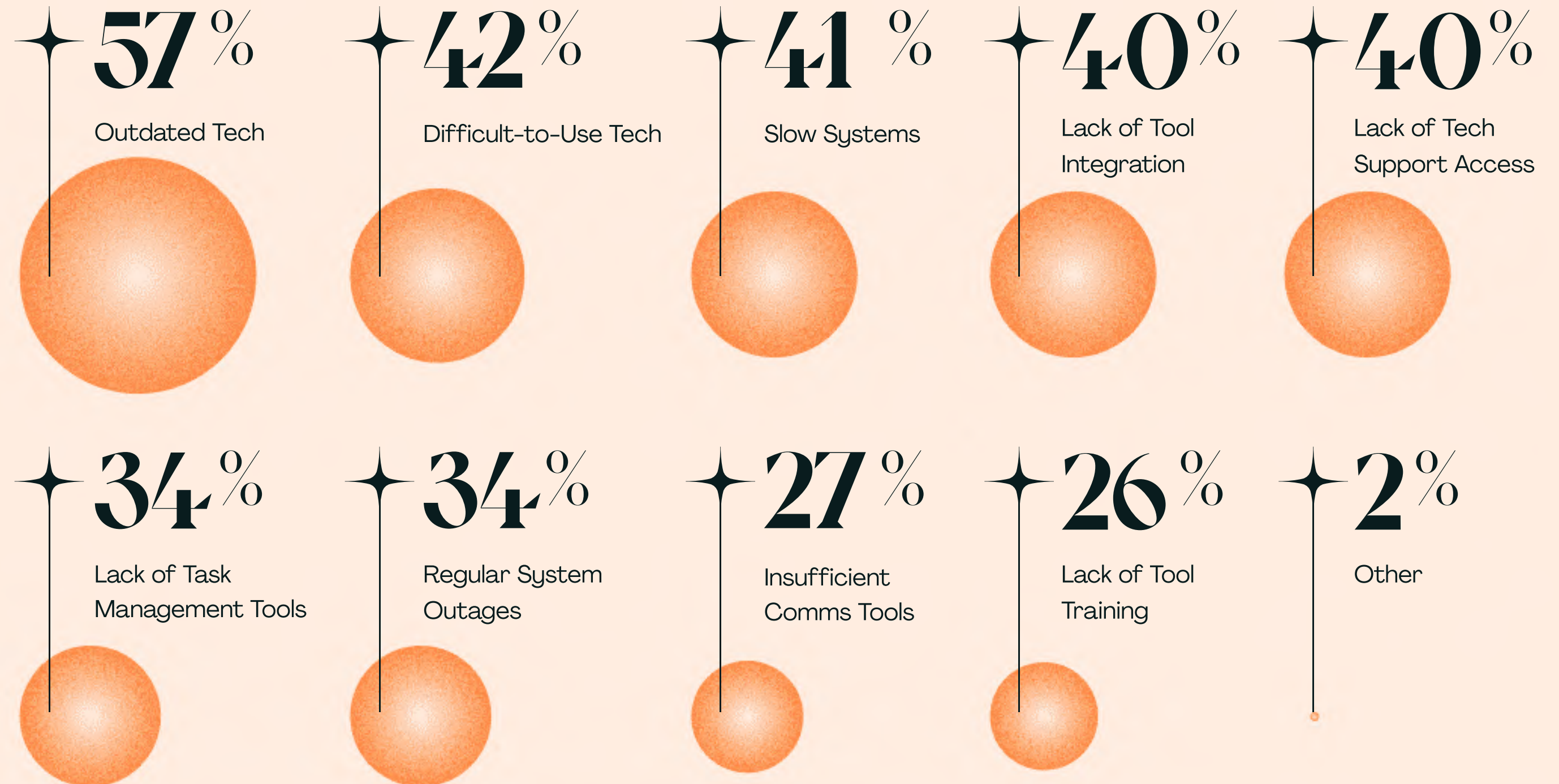
In addition to challenges posed by clients and collaboration, many Customer Success Managers grapple with added hurdles presented by their tech stacks.

Of the survey respondents who said they experience a lack of technological support at work, **57%** cite outdated technology as the primary reason. **40%** said that lack of integration between tools was the biggest pain point, while **26%** called out a lack of training on current tools.

See how CS teams are using modern Customer Success Platforms to get important things done faster: vitaly.io/blueprints

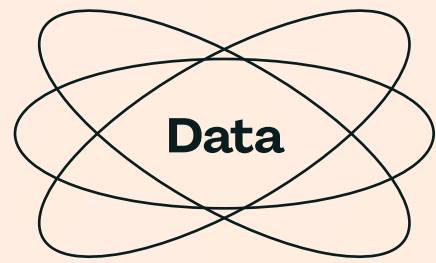


What is the primary pain point in your role caused by lack of technological support?

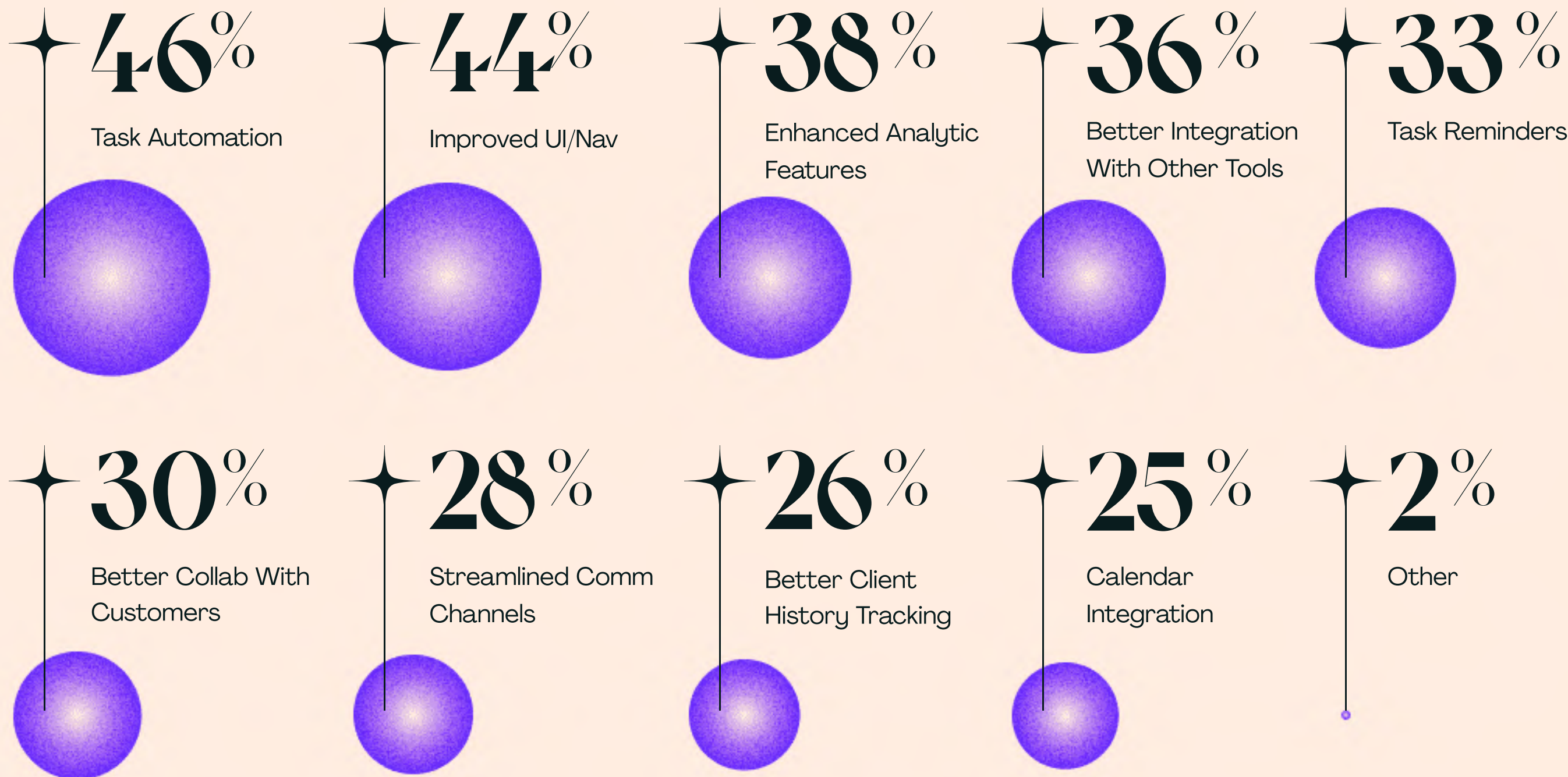


What do you wish you could tell your boss but can't?

“To be a bit more open-minded to
implementing new tools, even if it's
little by little.”



What change would you like to see made by your company's CSP?



What Do CSMSs Want From Their CSPs?

Surprisingly, **58% of our survey respondents** currently do not use **Customer Success Platform (CSP) software** in their roles, with CSMSs at companies with less than \$10 million in annual revenue being **17% less likely** to have access to this vital tool.

However, **82% of the CSMSs** who currently use a CSP say that it boosts their team's efficiency.

Watch: [How to automate common CS tasks with Vitaly Playbooks](#)

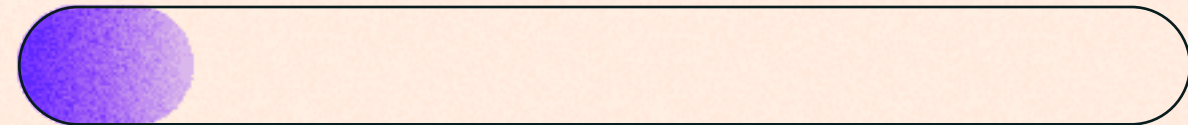
82%
of the CSMSs who currently use a CSP say that it boosts their team's efficiency.

Additional Learnings

Odds and Ends From CSMs

Their Current Work Environment

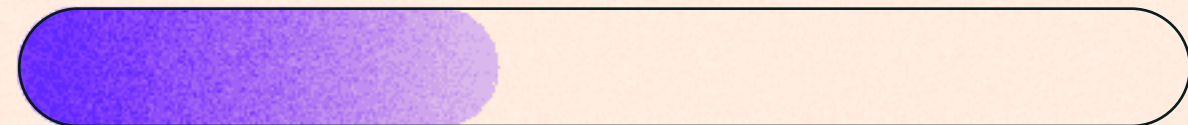
Fully Remote 15%



Hybrid 44%

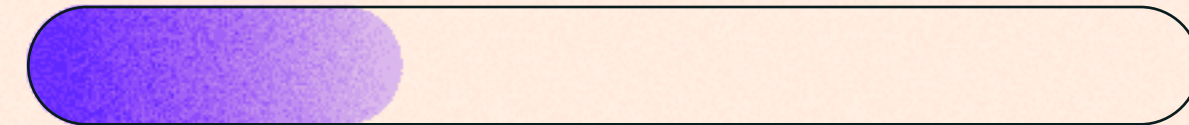


Fully Onsite 41%



Their Preferred Work Environment

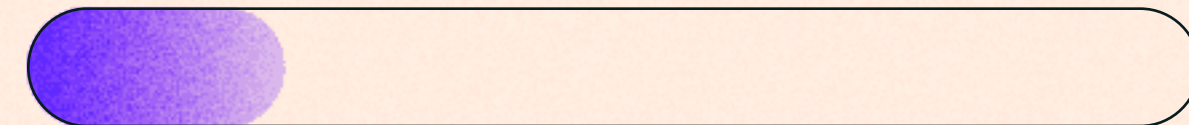
Fully Remote 32%



Hybrid 46%

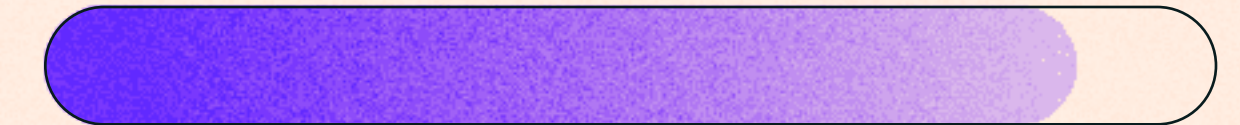


Fully Onsite 22%

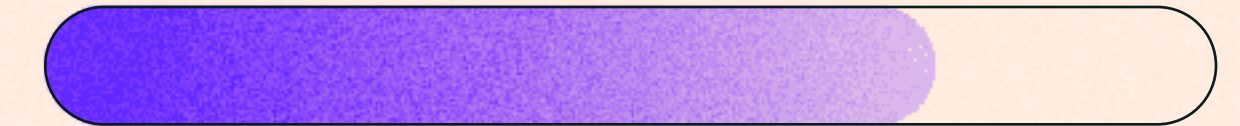


Work Relationships

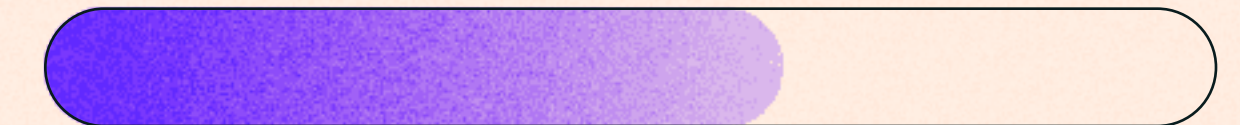
Have a Positive Relationship with Supervisor 88%



Feel Valued by Leadership 76%



Have a "Work Best Friend" 63%



What's the one thing that would most improve your job satisfaction?

“Moving to a hybrid job position. There's a lot of time I'm in the office for no reason.”

What do you wish you could tell your boss but can't?

“One thing I wish I could tell my boss is how much getting this job and how there for me she's been from the start has meant to me, and that I love her like family! I guess technically I could, but I don't want to make things weird.”

Summary ✨

Customer Success Managers are driven by passion and a genuine desire to help their clients. However, the combination of a down market for SaaS companies and the around-the-clock demands brought on by remote work and global customer bases have increased the stress-load for CSMs, to the point where their mental and physical health are being negatively impacted.

Balancing work and life for CSMs is an ongoing challenge, and it's one that leadership teams should approach proactively and empathetically, implementing more support for the people who work on the frontlines of customer experience.

Our survey respondents suggested that better internal communication, access to professional development resources, and more time off — without being made to feel guilty about it — would all provide higher overall job satisfaction. CSMs also feel underpaid compared to the level of pressure they have to endure from clients and management.

The work itself is often frustrating for CSMs, especially when they're faced with inefficient processes and outdated Customer Success software. Too much administrative work was a common complaint from our survey respondents, who are hungry to [automate repetitive tasks](#) so they can spend more time on in-depth strategy and client service.

Finally, a lack of internal and external [collaboration](#) is a challenge that needs to be addressed. Only a minority of CSMs describe their relationship with their clients as “highly collaborative,” and they feel siloed from departments like Operations and Sales.

While Customer Success Platforms can't address everything that keeps CSMs up at night, we see a big opportunity for CS teams to better leverage CSPs for task automation, [data organization](#), and client collaboration.

Once the common pain points of the CSM's day are alleviated through increased efficiency and productivity, CS leaders can focus on solving the company culture challenges that drive CSMs to burnout. (Step one: Please stop Slacking them on the weekends.)

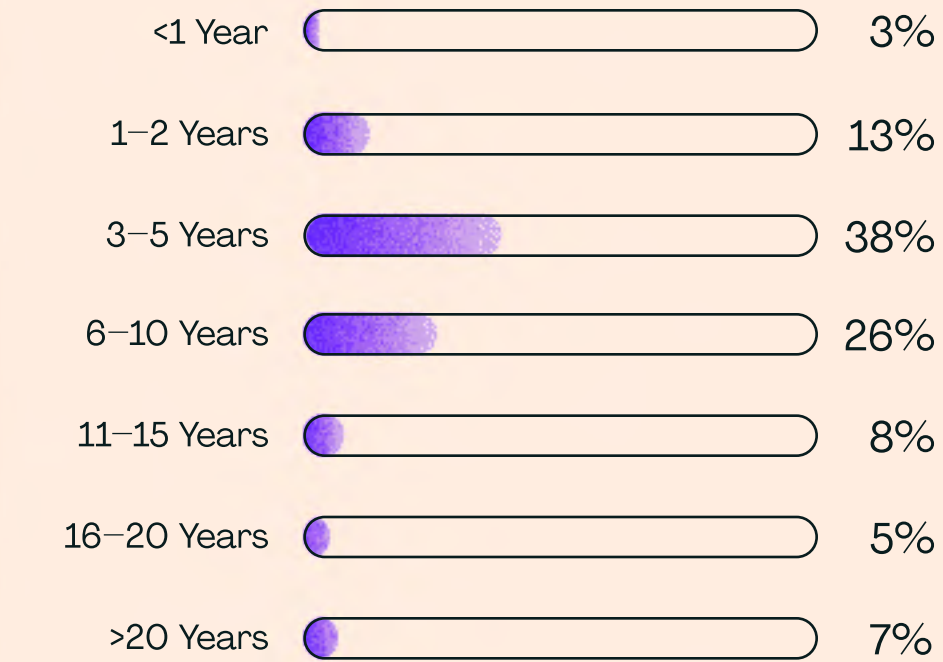
679

Survey Respondents

41

Average Respondent Age

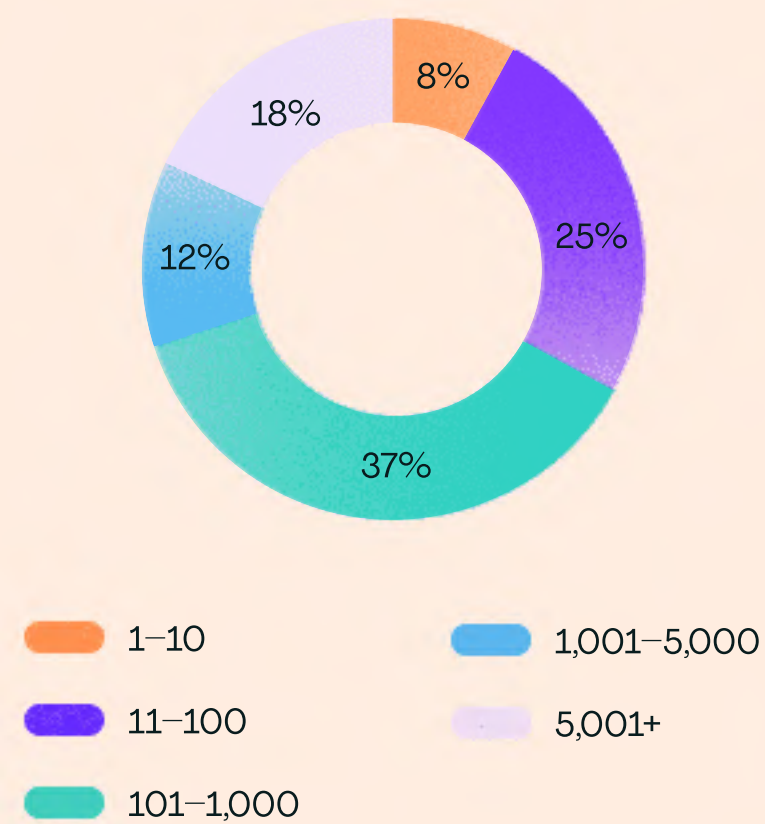
Number of Years Participants Have Been Employed as a CSM



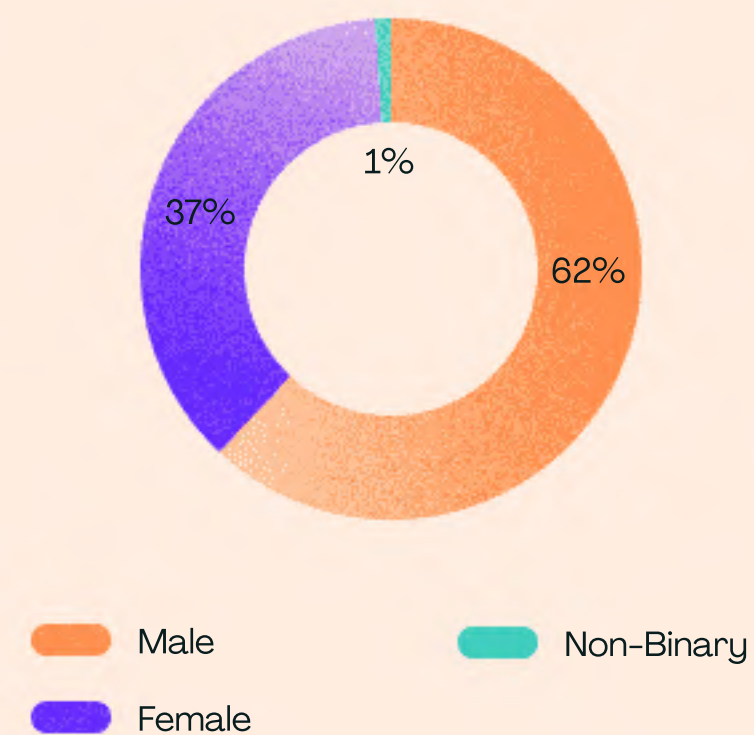
Annual Revenue of Participants' Company Last Year



Number of Employees at Participant Companies



Participant Breakdown by Gender



\$74,942

Average Respondent Salary

100%

of participants work as full-time B2B Customer Success Managers.

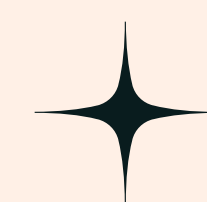
For more original research on the Customer Success industry and expert advice from the sharpest minds in CS, visit vitaly.io/success-network



Now that we've shed some light on the daily challenges of Customer Success Managers, you might be interested in fixing the internal roadblocks that get in the way of productivity on the CS team.

If so, Vitaly can help, providing seamless communication and collaboration within your Customer Success organization and beyond. Our all-in-one platform serves as the single source of truth for customer data, and helps CSMs and their customers develop truly collaborative relationships.

Vitaly is on a mission to help B2B companies improve productivity, visibility, and collaboration in the Customer Success department and beyond.



[Schedule a demo](#) to take your Customer Success team to a new level of efficiency.