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Stand Out, Get Hired, and Thrive: Modern Customer Success Skills for the AI Era
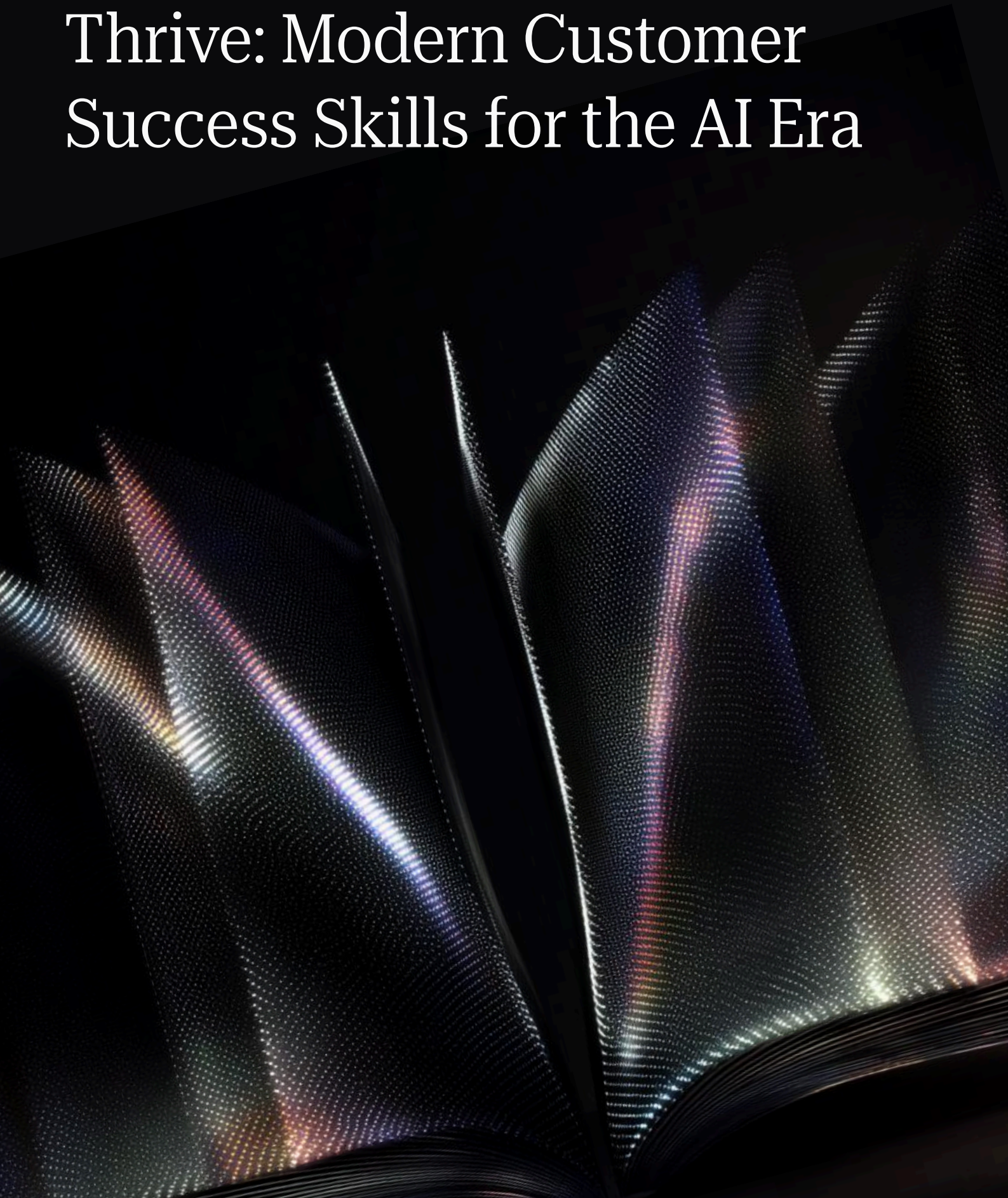
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Introduction

Calls are shorter. Prep time is tighter. You're being asked to own more:renewals, expansion, adoption. And you're still expected to make it personal. Your company wants faster insights, more automation, and proof that CS is driving revenue.

They expect you to be able to do all this because, with AI, you have the tools at hand. You just need to be able to use it as fluently as you use CS platforms or CRMs.

The old ways of managing accounts with static playbooks and manual check-ins aren't enough anymore. Customers expect speed, precision, and context. And you can only deliver if you're AI-literate, data-savvy, and business-minded.

CS isn't just the post-sales relationship team anymore. In many companies, it's becoming the engine behind retention, expansion, and customer-led growth. But with that shift comes new expectations. And new skills.

Can AI help with QBR prep? Is there a faster way to research accounts? Will it flag risks before they become a problem? The best CSMs are actively using AI to rethink how they work, what they prioritize, and how they deliver value.

This eBook is designed to help you do exactly that.

Whether you're early in your CS career or leading a team, what follows will help you:

→   Understand how the CSM role is evolving

→   Learn the key skills you'll need to stay ahead

→   Build new habits that make you more effective, faster

→   And show up to interviews or reviews with confidence in your future-readiness

Get ready for the age of AI, where the most valuable CSMs will continue to support customers, but they'll also be expected to orchestrate outcomes, drive revenue, and build systems that scale.

CHAPTER 1

Then vs Now: The Changing Face of Customer Success

How Customer Success evolved from a support role to a strategic operator.

Traditional Customer Success

Customer Success didn't start as a strategic function. In most companies, it came out of support or account management. Basically, they were the team that kept customers happy after the deal closed.

Back then, a "great CSM" was someone who built strong relationships, answered questions fast, and made sure customers were getting value. And honestly, that worked for a while. The job was all about retention, onboarding, and playing defense.

You had your own lane. Sales handled the close. Product built the roadmap. Marketing brought in leads. CS focused on adoption and renewals. Everyone stayed in their silo.

The tools were simple as well. Spreadsheets, a CRM, maybe a playbook if your team was a little more mature. And success was measured by NPS, support tickets, and whether your customer renewed.

But now the game has changed.

The New Model in the AI Era

Today, that old model isn't enough.

Modern CSMs are becoming operators. In addition to building relationships, you're influencing how much customers expand, how quickly they see value, and whether they become advocates.

You're expected to think like a GTM team member, not just a relationship manager. That means:

> → Owning renewals and influencing expansion opportunities
>
> → Running plays that directly impact revenue
>
> → Collaborating more deeply with Sales, Product, and Marketing

AI has raised the bar. What used to take hours, like summarizing a call, prepping for a QBR, figuring out which accounts need attention, can now be done in minutes. That's changing expectations, both inside the company and outside.

And because AI is handling more of the "routine work," CSMs are moving from reactive to strategic, and from task-oriented to insight-driven.

How AI is Changing the Game

Let's get specific. These are the shifts you're likely already seeing, or will very soon:

→ **Automation of repetitive tasks:** Tools like Intercom Fin can handle half your tickets. Meeting summaries, CRM updates, and onboarding sequences can all be automated.

→ **Proactive signals:** Instead of waiting for churn, AI can surface warning signs like drops in usage, late payments, or support patterns.

→ **Faster prep:** Instead of digging through notes before a call, AI can pull up the last conversation, highlight action items, and even suggest what to talk about next.

→ **Data-driven decisions:** No more flying blind. With AI-powered dashboards and predictions, you can prioritize where to spend your time and prove why it matters.

But the catch is, all of this makes the job *look* easier on the surface. But in reality, expectations are higher.

Ask Yourself

Take a moment to reflect:

→ Are you still operating with a "relationship-first" mindset, or are you shifting to an "outcomes-first" approach?

→ How comfortable are you with AI tools right now? Are you experimenting, or waiting to be trained?

→ Do you still work in silos, or are you part of strategic conversations about renewals, product, and growth?

You don't need to have all the answers right now. But if you're starting to feel the shift, you're not alone.

The future of Customer Success lies in evolving with the tools, expectations, and business realities that are already here.

CHAPTER 2

The Skills Modern CSMs Need to Stand Out

What CSMs need to stay valuable in an AI-driven world.

You've probably heard people say, "AI won't take your job, but someone who knows how to use AI might." The same goes for Customer Success.

The CSMs who adapt fastest are the ones getting promoted, poached, and pulled into strategic conversations.

Execution & Ownership

The best CSMs today drive outcomes.

This means showing up with a "get it done" mindset. You don't need a perfect deck or a 10-step plan. You need clarity on what matters this week, and the discipline to focus on it.

> "
>
> "At Fyxer we use the Four Disciplines of Execution to stay focused. We define battles we're going to fight each quarter, and everyone makes weekly commitments that ladder up to the most important goal. That becomes the priority, and everything else comes second."
>
> Violaine Yziquel, Co-Founder & Former CEO of Customer Success Network, CCO at Fyxer AI

This kind of mindset often shows results in many ways:

> → You keep your pipeline clean without being asked.
>
> → You block time each week to follow up on risk accounts.
>
> → You experiment with your own workflows to improve speed.

More than anything, CS leaders are looking for people who take initiative and follow through. Instead of doing only what you're told, go the extra mile. Try to spot inefficiencies, challenge the status quo when it's holding back results, and have the drive to see things through.

This kind of high-energy, ownership mindset is increasingly rare, but incredibly valuable. You don't need permission to make something better.

Curiosity & Experimentation

Top CSMs need to be curious. Not in a surface-level way. but in a "let me try this new tool and push it to its limits" kind of way.

You'll often find them:

> → Testing out how ChatGPT can prep them for customer calls
>
> → Using Perplexity to research a customer's industry in 2 minutes.
>
> → Putting together automation in Zapier, just to see if it works.

They also get curious *outside* of CS. They'll shadow Sales, ask Growth about lifecycle emails, or peek into Product's backlog. This helps them understand how it all fits together.

Data Fluency

CS is no longer a "feelings-first" function. You still need empathy, but you also need to speak data.

That doesn't mean pivot tables or SQL (although those don't hurt). It means being able to look at:

> → Product usage data and know which accounts are slipping.
>
> → NPS trends and identify where customer sentiment is softening.
>
> → CRM timelines and see where a renewal needs a push.

It also means being able to take action:

→ Creating playbooks for feature adoption based on usage gaps.

→ Triggering a retention campaign when usage drops below X%.

→ Logging qualitative feedback in a way that the product team can act on.

No one's telling you to get a degree in data science to be a CSM. But you do need to be someone who listens to what the numbers are telling you, and then does something about it.

Technical Agility

A quick reality check: You don't need to know how to code, but you do need to understand how systems talk to each other.

You should be able to:

→ Understand what an API does (at least conceptually).

→ Know the basics of what your GTM stack includes: HubSpot, Intercom, Salesforce, Slack, Zapier, etc.

→ Talk to engineers without getting lost in the jargon.

More advanced CSMs are going a step further by becoming **automation enablers.** Maybe they're setting up webhooks between platforms. Maybe they're writing simple prompt libraries for AI bots. Maybe they're just flagging low-lift wins to the ops team.

Either way, they're not afraid to make use of the tools available to them.

Human Skills That AI Can't Replace

Yes, AI is changing a lot. But there are some things it just can't do.

→ **Build trust.** You still need to earn credibility through follow-through, honesty, and knowing what matters to your customers.

→ **Tell a story.** Turning raw data into a compelling narrative that moves stakeholders? Still a human job.

→ **Read the room.** When a customer sounds polite but appears hesitant, AI might miss it. You won't.

And one underrated trait: **playfulness.** The best CSMs don't take themselves too seriously. They bring a bit of humor, energy, and levity into their work. It helps customers open up, and it keeps the job fun.

Next, let's talk about how to actually *build* these skills. You don't need to learn it all at once, but you do need to get moving soon.

How to Practice and Build These Skills

Practical ways to level up as a CSM.

Actually building the skills you need as a modern CSM can seem tough.Your calendar is already packed with back-to-back customer calls, internal meetings, and the occasional fire drill.

But you don't need to carve out hours each day to level up. If you're intentional, small steps can compound quickly. This chapter breaks down tactical ways to build the habits and muscle memory that matter in today's AI-powered CS landscape.

Build with purpose

Start with one thing. Don't try to automate your entire workflow at once. Pick a low-stakes process, like prepping for a recurring check-in, and experiment with using AI to make it faster or better.

You could:

→   Use AI to summarize past meeting notes and CRM activity before a call.

→   Build an onboarding content assistant that drafts tailored welcome emails.

→   Set up an AI-powered customer research cheat sheet based on usage data, support tickets, and past QBRs.

"Jump on the boat of AI and make it the best tool of your life to help you grow. If you're someone who likes to challenge the way you do things and optimize your time, tools like Perplexity or Charged GT can completely change your workflow. You can prep for a customer meeting in 10 minutes, pulling product usage, subscription data, stakeholder info, and news. Modern CSMs should be all over this."

Violaine Yziquel, Co-Founder & Former CEO of Customer Success Network, CCO at Fyxer AI

Don't set perfection as your goal. The real goal is to find a repeatable way to save time or enhance output, even if it's not a dramatic improvement. Once it's working, teach someone else. Then try the next one.

Sharpen analytical thinking

When a customer stops using a feature, a modern CSM has to not only notice, but also know what the issue means and what to do next. That level of insight starts with watching the right signals.

Here's a simple exercise:

> Pick 3–5 product signals you can access. Maybe it's logins, feature clicks, support ticket volume, or license utilization. Then:
>
> → Create a simple trigger → action map (e.g., "low usage in Week 2 → trigger onboarding refresher")
>
> → Track your assumptions manually over a month
>
> → Adjust based on outcomes and build a lightweight playbook

Even if you don't have a fancy product analytics tool, you can still train your brain to think in terms of cause, signal, and outcome.

Get technical, without a computer science degree

You can be confident with technology even if you don't know how to write Python scripts. You just need to understand how the systems around you talk to each other, and how to ask the right questions

A few high-impact ways to get started:

→ Take a free or low-cost no-code/low-code course. Tools like Zapier or Make help you automate everyday workflows.

→ Learn what APIs do (think of them like translators between your tools) and how integrations are set up.

→ Partner with a GTM or RevOps engineer to shadow one of their projects. Ask them to explain how systems pass data between platforms like HubSpot, Salesforce, Intercom, and Slack.

This technical fluency is good for efficiency, and it makes you a more strategic partner when advocating for customers.

Grow your network intentionally

Nowadays, most online communities are a mess of Slack channels you forget to check. But that doesn't mean you should write them all off.

The trick is to use your network deliberately. Instead of dropping into general discussions, try:

→ Reaching out 1:1 to someone who posted a smart insight

→ Asking for 20-minute virtual coffees with CS leaders you admire

→ Joining niche groups that focus on AI in CS, automation, or product adoption

A good network gives you feedback, accountability, and new ideas to bring back to your team.

Now that you know how to develop the necessary skills, let's talk about how you can turn all these skills into interview gold. Let's talk hiring.

Interviewing and Getting Hired in the AI Era

Learn what hiring managers want from modern CSMs.

You've been building the skills. You're experimenting, automating, analyzing. Now comes the part that can feel a little uncomfortable: showing it off.

Whether you're actively job hunting or just keeping an eye on the market, the expectations for CS candidates have shifted, especially in AI-forward teams.

In this chapter, we'll walk through what hiring managers are really looking for, how to stand out in interviews, and what your resume and LinkedIn need to reflect if you want to stay competitive.

What hiring managers are looking for

In the past, hiring managers were mostly scanning for buzzwords or years of experience. Now they're also looking for signals that you're adaptable, revenue-minded, and capable of working in a fast-moving, AI-powered environment.

Here's what that looks like:

→ **Curiosity**
Are you exploring new tools on your own? Playing with ChatGPT, Perplexity, Zapier, even if it's not part of your official job? Hiring managers want signs that you're genuinely interested in how tech can change the way you work.

→ **Drive and ownership**
Can you show how you move things forward on your own? Weekly progress updates, personal OKRs, or a side project you launched are great examples. They're looking for people who don't wait for permission.

→ **Revenue orientation**
Are you comfortable talking about renewals, upsells, and account growth? Even if you weren't "quota-carrying," showing that you understand the commercial side of CS is a huge plus.

→ **Real metrics**
"Worked on onboarding" is vague and unhelpful. But "reduced onboarding time by 30%" or "increased adoption of X feature by 50%" tells a clearer story. Hiring managers want to see the impact of your work.

How to demonstrate these skills in an interview

This part trips people up, and it's not because they don't have the experience. It's usually because they forget to tell the story behind it. Think about your recent work through the lens of action, learning, and outcomes.

Here's what to prep:

→ **Stories about mistakes**
Yes. They're valuable. Share a time you missed a renewal risk, or tried to automate something that backfired. Then explain what you learned and how you improved things.

→ **Examples of process improvement**
Maybe you set up a Slack workflow to notify CSMs of low usage. Or built a health score that made your QBRs more impactful. Walk through the before/after clearly.

→ **Cross-functional collaboration**
Talk about a time you worked closely with sales, product, or marketing. What was the shared goal? What did you contribute? What was the outcome?

Be ready for questions like:

→ *How are you using AI today?*

→ *How have you used data to prevent churn?*

→ *How would you improve our onboarding experience?*

The key is to tie everything back to real work and real results.

Resume & LinkedIn tips for the new CS era

Think of your resume and LinkedIn as your teaser trailer. Listing every task you've done is an outdated way of going about it. Instead, include the things that clearly show how you've created value.

Keep these principles in mind:

> → **Include real, quantifiable metrics**
> Use numbers and data wherever possible: "Drove 20% increase in feature adoption," "Improved NPS by 15 points," "Cut onboarding time by 10 days."
>
> → **Mention the tools you know**
> If you've used AI bots to summarize meetings, include that. Tools like HubSpot, Intercom, Zapier, Notion AI, and how proficient you are in them matter.
>
> → **Highlight cross-functional projects**
> Did you collaborate with product on a feature rollout? Co-own a campaign with marketing? These are the kinds of stories that show you're more than a relationship manager.

Your next opportunity might come from a recruiter scanning your profile. So make sure it reflects the CSM you are today. The one who's ready for the business landscape of today. Not the traditional CSM you were two years ago.

Next up: Where this is all heading, and how you can stay ahead of the curve.

CHAPTER 5

Where CS is Headed, And How You Can Stay Relevant

Adaptability is the new job description. Learn what that means.

If you've made it this far, you've probably understood the shift already. CS is undergoing a transformation. What used to be a post-sales support function is now at the center of customer growth, revenue, and strategic impact.

But staying relevant in this next era of Customer Success means letting go of some assumptions, picking up new skills, and stepping into roles that might not have existed even five years ago.

CSMs becoming mini-CEOs for their accounts

The best CSMs are orchestrating the entire post-sale experience. It's like being a Chief Operating Officer, but for a portfolio of customers.

What does this look like?

> → Taking ownership of **revenue** (renewals, upsells, expansions).
>
> → Watching for **early signals** of risk or opportunity, and acting on them.
>
> → Understanding how onboarding, product usage, support, and success all connect.

You don't need a "rev ops" title to think like an operator. If you know how to connect the dots between adoption and account health, or between customer goals and product outcomes, you're already playing that role. Now it's time to lean into it fully.

The playbook isn't dead, but it is evolving

Yes, playbooks still matter. But we're moving beyond static checklists.

Modern CS playbooks are:

→ **Signal-based** – they trigger based on product usage, sentiment, or account milestones.

→ **Dynamic** – they evolve with each customer's journey, not just the calendar.

→ **Augmented by AI** – think automated follow-ups, smart meeting prep, real-time health scoring.

But don't forget: **human connection still matters.** The AI can suggest what to do, but how you show up, frame a conversation, build trust, and advocate for your customer is something it simply can't replicate.

So don't ditch the playbook. Just update it for a smarter, faster, more interconnected world.

And remember, there's no need to predict every trend in CS to stay relevant. You just need to be ready to adapt, experiment, and stay customer-obsessed, even as the tools and tactics change around you.

In our final section, we'll pull it all together with a few key principles to guide your next steps.

CONCLUSION

Be the CSM the Future Needs

As AI reshapes how companies operate, it's not just your tools that need to evolve. It's your mindset.

The CSMs who will thrive in this new era won't be the ones clinging to old definitions of the job. They're the ones who are open, adaptable, and willing to redefine what it means to drive customer value.

So here's what matters now:

> → **Be experimental.** Try new tools. Automate a manual process. Test something, even if it doesn't work the first time.
>
> → **Stay curious.** Understand how other teams operate. Ask why things are done a certain way. Keep learning, even when you're busy.
>
> → **Take action.** Don't wait for perfect plans. Do the thing that moves forward your customer or your company.
>
> → **Work across teams.** Great CS isn't built in a silo. The more connected you are to product, sales, and marketing, the more impact you'll have.
>
> → **Be human.** Empathy, trust, and clarity still win. That won't change, no matter how good AI gets.

More than anything, stay flexible. Keep learning. Focus on outcomes. And don't be afraid to redefine your role as the landscape shifts.

The CSMs who embrace change will be the ones setting the pace for what comes next.

Brought to you by Velaris

Velaris is the intelligent Customer Success Platform built to help CS and post-sales teams gain control over operations, scale outcomes and prove their impact.

Want to see how we can help you?

Book a demo today ↗

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