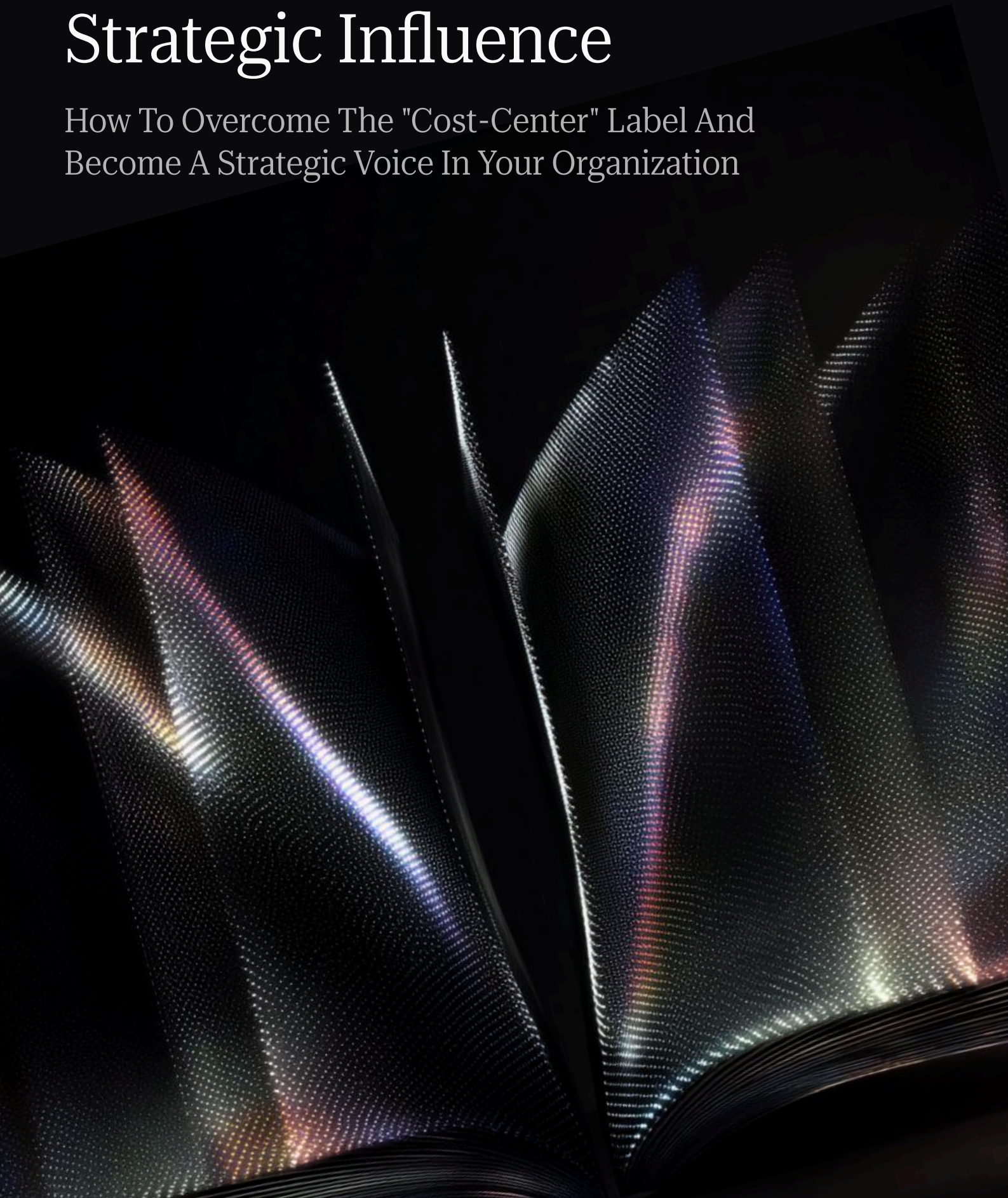velaris

The CS Leader's Guide to Strategic Influence

How To Overcome The "Cost-Center" Label And Become A Strategic Voice In Your Organization

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velaris

Introduction

You're in the quarterly planning meeting. The room is excited to hear about Sales talk about pipeline velocity. Marketing rolls out a flashy new campaign and everyone's clapping. Then it's your turn.

"Retention's good," you say. "We've been working closely with customers to ensure adoption. NPS is trending up."

The room nods politely. Then moves on. Sound familiar?

Too often, Customer Success gets treated like a post-sales afterthought; it's a team that's "nice to have," but not truly driving the business forward. Sometimes you're seen as glorified support. Other times, just relationship managers who babysit accounts.

And when budget cuts come around? You're first on the chopping block.

It's frustrating. But it's not entirely irrational.

Because here's the truth: building strong customer relationships isn't enough to earn strategic influence. To shift the perception, CS leaders have to go beyond connection. You need to show how Customer Success drives measurable business outcomes.

That's what this book is here to help with.

Inside, you'll find practical ways to connect your team's work to revenue growth, expansion, and long-term customer value. Not just feel-good metrics, but the kind of data that makes the C-suite lean in.

If you want CS to be seen as essential, it's time to start speaking the language of the business. And if you're aiming to move beyond CS leadership into a CCO or CRO role, mastering this shift from retention to revenue ownership is how you get there.

CHAPTER 1

The Cost Center Trap:
Why CS Has Been
Labeled the 'Fixer'

The fundamental misconception that holds
CS leaders back and the mindset shift you
need to unlock growth.

What CS Leaders Get Wrong: Relationship-Building Doesn't Create Value

You've probably seen this play out: A CSM builds an amazing relationship with a customer, where they're chatting regularly, sharing laughs, and could name five fun facts about each other.

The customer says they're happy. Everyone feels good.

Unfortunately, this isn't enough.

If your CS team is only focused on keeping customers satisfied and sticking around, you're operating in neutral. You're preserving what's already there, but you're not moving the business forward.

Retention is maintenance. Value is momentum. And only one of those earns you a seat at the executive.

The Misconception:

It's easy to feel like you're doing great work when your customers like you. You're responsive, they thank you in meetings, and the relationship feels strong.

But the hard truth is, if your work isn't helping customers improve how they operate or make meaningful progress toward their goals, then it's not driving real business value.

Many CS teams pride themselves on being great relationship builders. But that shouldn't be your end goal, that should be your starting point.

True value creation happens when you help your customers reach outcomes they couldn't get to on their own. When you challenge their thinking, shift their approach, and align their success with your solution, then you're creating value.

> "If you just build relationships, you are a cost center. If you build relationships that drive value to a customer, where you challenge your counterpart on the customer side to do something differently, better, and faster, then you are building value.
>
> Ask yourself the question. Which part of the business am I a part of? Unfortunately, often the answer is that right now you are not the value creation team.
>
> You are a value maintaining team."
>
> Daniel Farkas, Former CRO, Staffbase, VP of CS, Renewals and Sales at Box

Why This Is a Problem

Simply maintaining relationships or answering customers' questions does not directly drive revenue or improve business outcomes.

And the business landscape is only getting tougher with the rise of AI and agentic systems. Businesses are moving past just selling licenses or seats. Now it's about selling results.

That means every team, including CS, is under more pressure to show the value they bring. It's not enough to be helpful. You've got to be impactful.

> "AI agentic businesses will be focused on delivering business outcomes to our customers rather than just seed or capacity that they will be buying from us. That will put pressure on costs, so every single person and team you hire is going to be all about the value they're bringing".
>
> Daniel Farkas, Former CRO, Staffbase, VP of CS, Renewals and Sales at Box

In fact, CS is probably under more pressure than any other team. Research by Bain shows that nearly 60% of software companies boosted their CS spending, but Net Revenue Retention (NRR) has dropped for 75% of them.

That disconnect between investment and results is exactly why CS is still treated as optional. The picture of Customer Success as a waste of an investment is stronger than ever.

For CS leaders, this should be a wake-up call. You're now navigating a fundamental shift in how companies grow, how customers buy, and how value is measured.

And when CS teams focus on relationships as an end in themselves, they fall into the trap of **"fixing" things** rather than **creating new value.**

CS then just appears as an optional add-on to sales that helps to make the expected value that sales has already created be actually delivered.

People also often see CS as a reactive function, handling issues after they occur, rather than proactively contributing to the business's long-term success. You're basically no different from customer support at that point.

This is especially problematic when CS teams themselves start to believe this version of their role.

If relationship-building is the only goal, then CS teams might feel comfortable without pushing for the more **strategic outcomes** that drive revenue, such as **expansion revenue**, **upselling**, and **proactive value delivery**.

If you fall into that mindset, you're never getting a chance to prove your worth as a CS team.

The Shift in Mindset that CS Leaders Need to Make

To move beyond the "cost center" label, CS leaders need to realize that relationships alone are not enough. While they play a crucial role in customer success, the key is to use those relationships as a foundation to deliver outcomes that tie directly to the company's growth goals.

CS has the potential to make a bigger impact on an organization's business outcomes than you think. For example, research by Bain indicates that a 5% boost to retention rates can increase profits by 25%.

So don't be afraid to fundamentally change the way you operate in CS, if that's what it takes to create value.

So how do you actually make that shift to start creating value? What does it look like in practice?

In Chapter 2, we'll discuss exactly how you can do this.

CHAPTER 2

From "Fixing" to Creating Real Value

Key steps to move from "cost-center" to "value creator".

What Is "Value" Anyway?

We've been talking a lot about "value", but ask five people what that means, and chances are you'll get five different answers.

For most CS teams, value equals satisfaction. If the customer is happy, we must be doing something right, right?

Not quite. In a world where the C-suite is watching budgets and demanding outcomes, "value" needs a much tighter definition.

To your CEO or CFO, value means business impact. It means revenue that wouldn't exist without you.

Here's what value **isn't**:

> → Answering tickets quickly
>
> → Having a friendly relationship with the buyer
>
> → Keeping your churn rate flat

And here's what it **is**:

> → Driving expansion through meaningful adoption
>
> → Preventing churn through proactive alignment with business goals
>
> → Unlocking customer insights that shape product and pricing strategy
>
> → Making revenue more predictable

So, if you're still thinking of CS as the team that just "keeps customers happy," you're operating with the wrong definition.

In the rest of this chapter, we'll explore how to act like a business partner, deliver value at scale, and transform your team into a real growth engine.

How to Drive Value That the C-Suite Cares About

1. Position Yourself as a Business Operator

It's one thing to be a partner to your customers. It's another to be a partner to your company's leadership.

If you want to influence decisions, shape strategy, and get buy-in for CS investments, your leadership team needs to see you as someone who thinks beyond customer health scores. Someone who understands how CS fits into the company's bigger picture.

CROs and CCOs are actively looking for people who already understand how the business works. People who don't need hand-holding, but come to the table with ideas, numbers, and a clear understanding of how their function supports the company's growth goals.

Understand their priorities; you can't be stuck thinking only about your own avenue of customer relationships.

Start Asking Business-First Questions

To elevate your role, you need to start asking:

> → How does our customer experience impact revenue this quarter?
>
> → What can CS do to shorten time-to-value or increase average expansion per account?
>
> → Where are we seeing friction that's slowing down renewals or hurting margin?
>
> → Are customers adopting the product in ways that drive renewals?

When you show that you're thinking about these things, and not just customer check-ins, you earn credibility as someone who helps drive the business.

Drive Value at Scale

To really be a business partner to the C-Suite, you have to demonstrate that you can drive value at scale.

Shift your focus from one-to-one relationships to strategies that impact your entire customer base.

That means helping users unlock more value through deeper product adoption, identifying signals that indicate upsell or cross-sell readiness, and building systems that work across hundreds of accounts.

> **Pro Tip**
>
> Set up signals that automatically flag accounts showing readiness for expansion—like hitting usage thresholds, adding new users, or engaging with specific features. This ensures your team focuses energy where it's most likely to create measurable impact.

By aligning yourself with what the business actually needs to grow, you stop being seen as the team that "manages churn." Instead, you start being seen as a strategic operator who can influence the top line.

2. Position your team as business advisors to your customers

To really drive the message that you're a true business partner, it's critical that you step into the role of a trusted advisor to the customer. Sure, you can help solve their problems. But you also need to start helping customers achieve their strategic business goals.

When you establish yourself as a trusted advisor to your customer, you're in a better position to deal with their problems proactively, since you can anticipate issues before they escalate.

When you establish yourself as a trusted advisor to your customer, you're in a better position to deal with their problems proactively, since you can anticipate issues before they escalate.

And when you are well-aligned on achieving business goals, it is easier to drive faster adoption, stronger product stickiness, and ultimately, higher expansion potential.

Understanding Customer Business Needs

You need to deeply understand the customer's business, their industry challenges, and how your product can solve their specific problems. Doing research on your customers, keeping up with industry trends, and being familiar with your own product are all vital steps.

> "Learn about your customers to a point where when you speak to them, they feel like you're a part of their team."
>
> Daniel Farkas, Former CRO, Staffbase, VP of CS, Renewals and Sales at Box

Each of your customers might have unique and complex business problems. If you understand your customer, and your product well enough, you will be the best person to advise them on how they can apply your product as a solution.

Pro Tip

Regularly meet with key customers not just to check on product usage, but to discuss their broader business challenges, competitive landscape, and growth goals. A good question to ask can be, "what does success look like for you?"

Creating Value Beyond the Product

It's always worth considering if you can suggest strategic improvements and solutions that **extend beyond your product itself**. Doing this enables you to position yourself as a true business advisor.

Try to proactively create value by identifying new use cases and exploring additional ways the customer can benefit from your solution. Look to deliver on opportunities they haven't even thought about yet.

If your customers trust you to be effective in creating value beyond the product, they also have more reason to be repeat customers who return when they move to new companies.

Once again, the best way to do this is to know your customer and product inside out.

3. Create a "Business-First" Culture in your CS Org

Shifting your team's focus from problem-solving to strategic business advisory means a cultural change. As a leader, it's essential to create a culture where value creation is the central mission of the team.

What does that look like in practice? You can do things like celebrating instances where team members go above and beyond to impact the customer's business and show how their work contributes directly to revenue, retention, and expansion.

Pro Tip

Hold team-wide discussions about the big picture, and how each member's role connects to business outcomes. Encourage your team to think strategically about each customer interaction and reward them for providing proactive, business-driven insights that lead to measurable results.

Training Your Team to Be Business Advisors

One of the most significant steps to positioning CS as a true **business partner** is ensuring that your team members are equipped with the skills and mindset of **business advisors** rather than just customer support specialists.

As a business advisor, your CS team needs to think beyond just fixing problems and ensuring product satisfaction. They need to act as trusted consultants, proactively guiding customers toward achieving their business objectives.

This requires CS leaders to communicate to their teams that the reactive approach they took in the past needs to change. The entire team needs to be focused on aligning the product with the customer's overall business strategy, and actively seeking out opportunities to create value.

Key Skills for CS Advisors

To prepare your team to become business advisors, you'll need to focus on training in key areas, including:

→ **Business Acumen:** Equip your team with a deep understanding of your customers' industries, challenges, and competitive landscapes. This will allow them to provide value through tailored recommendations and strategic advice.

→ **Consultative Selling:** Teach your team how to uncover business pain points, identify opportunities for improvement, and offer solutions that drive value.

→ **Communication and Influence:** Your team needs to be able to influence decision-making by demonstrating how your solution drives business outcomes. This means coaching them on negotiation skills, handling objections, and having strategic conversations with decision-makers.

→ **Product familiarization:** Train your team to be very familiar with the product, so that they can effectively identify which product features or services align with the customer's unique business goals. This ensures their recommendations are always relevant and impactful.

Practical Steps to Build Business Advisor Skills

→ **Onboarding and Ongoing Training:** Start by providing a solid onboarding program that focuses not only on product training but also on understanding the customer's business. Follow up with continuous learning through workshops, webinars, and industry reports that help the team stay up to date with customer trends and challenges.

→ **Shadowing and Mentorship:** Pair your newer team members with senior CSMs who excel in business advisory roles. This mentorship will give them hands-on experience in strategic conversations and value-driven recommendations.

→ **Regular Business Reviews:** Set up weekly or bi-weekly sessions where CSMs can discuss the business outcomes of their accounts. Encourage them to present strategic insights, and provide constructive feedback on how they can further improve their advisory approach.

Specializing Your CS Team for Greater Impact

As CS matures into a value-driving function, the generalist approach doesn't always scale. Expecting every CSM to handle all the aspects of CS can lead to burnout, and missed opportunities. One method to consider in solving this issue is team specialization.

By organizing your Customer Success team around key parts of the customer journey, you can ensure each phase gets the attention and expertise it deserves. For example:

→ **Onboarding specialists** focus on accelerating time-to-value and ensuring smooth implementation.

→ **Retention or lifecycle managers** monitor engagement and health signals to reduce churn risk.

→ **Support liaisons** handle more technical or reactive customer needs in coordination with Support.

→ **Expansion-focused CSMs** work closely with Sales to identify upsell and cross-sell opportunities.

This model not only allows for deeper expertise in each area, but also helps you align internal KPIs with business outcomes more clearly. It's easier to measure and improve onboarding velocity, renewal rates, and expansion revenue when ownership of each area is defined.

You don't need to restructure overnight. But as your team grows, you might want to think about where specialization could free up time and drive a more measurable impact.

Pro Tip

Start small. Pilot a specialized role in one high-impact area like onboarding or expansion, then expand the model based on outcomes.

CHAPTER 3

Partner Across the Org

How to build influence by bringing value
cross-functionally.

If you want CS to be seen as a revenue driver you need to work across departments. That means building real partnerships with Sales, Marketing, Product, and RevOps.

Why? Because that's how you embed CS into the business. You make your impact visible, measurable, and repeatable. You influence what's sold, how it's marketed, how it's built, and how success is defined.

When CS becomes the thread that ties everything together, it's impossible to ignore your value.

Bringing Sales and CS Together to Maximize Value

A key element of proving you're a business partner is **collaboration with sales.** CS and sales often work in silos. But when they're aligned, they can work together to provide a seamless, value-driven customer experience.

A really powerful way to demonstrate value is through collaborating with sales on **account strategies** and **customer journeys.** Sales teams focus on selling the right solutions, while CS ensures that customers see value from those solutions and continue to expand.

To make that happen, CSMs need to listen carefully to customer needs and signals, and then collaborate with Account Managers when there's a potential fit for expansion.

Have your eyes and ears on the ground, and pass the baton at the right moment.

Pro Tip

Align your goals with sales: work together on account health assessments, expansion strategies, and customer renewals. Share data and insights between CS and sales teams to create a seamless customer journey.

Helping Marketing Tell the Right Story

You know your best customers. Marketing knows how to tell a story. Put that together and you've got a powerful loop:

CS feeds insights into what value looks like, and Marketing amplifies that message in ways that attract more of the right customers.

Whether it's case studies, onboarding content, or persona-based campaigns, your day-to-day with customers can help Marketing sharpen their messaging and build better materials across the funnel.

Pro Tip

Nominate top accounts for advocacy programs. Share persona-level insights from your success stories to help Marketing target more effectively.

Making Product Feedback Actionable

You're sitting on a goldmine of insights, like what customers love, what's confusing, and what's blocking adoption. It'd be a waste if that feedback doesn't go back toward improving the product.

Work with product teams to turn usage trends and customer stories into roadmap priorities. Show them where friction is costing revenue or where a feature is driving expansion.

Pro Tip

Start a simple feedback loop: what CS surfaced, what Product shipped, who it helped, and how it moved the needle

Partnering with RevOps to Make Impact Measurable

CS might drive outcomes, but RevOps helps prove them. They're the team that connects systems, builds dashboards, and ensures data integrity.

Work with RevOps to define churn, expansion, and retention consistently across the org. Align on how CS performance is tracked and visualized, especially for executive visibility. The more tightly CS integrates into the data fabric of the company, the harder it is to ignore your impact.

Pro Tip

Co-create dashboards that blend CS activity with revenue signals, like how product adoption links to expansion or how health scores predict renewals.

CHAPTER 4

Demonstrating
Value with Data

Prove your worth with metrics that catch the
eye of leadership

To transform your image from a cost center to a **value-creation powerhouse**, one of the most powerful tools at your disposal is **data**.

Data-driven insights not only demonstrate the impact of Customer Success (CS) but also position your team as integral to the company's overall strategy and growth.

By focusing on metrics that align with business goals, you can effectively communicate the value that CS brings, making it clear that your team is contributing to the company's long-term success.

To earn your seat at the table, it's essential to shift the conversation from qualitative reports of "good customer relationships" to quantitative proof of **measurable impact**. CS leaders must use data to prove that their efforts contribute to **company growth**, **retention**, and **revenue**.

Key Metrics Every CS Team Should Track to Prove Value

Before you jump into the numbers, take a step back and ask: What are our company's top priorities right now? Is it growth? Retention? Global scale? Maybe it's improving margins or increasing wallet share.

Whatever those strategic goals are, your metrics should be mapped directly to them. Otherwise, even strong numbers won't resonate.

Identify the high-priority business objectives, then use that lens to measure and communicate the impact of Customer Success.

Some metrics act as proof points that show your team is helping the company hit its financial goals, and these are usually what the C-suite cares about the most.

Here are those critical metrics and how to use them:

Net Revenue Retention (NRR)

This metric reflects the ability to retain existing customers while growing the business with them.

By tracking NRR, CS can demonstrate the value of retaining and expanding existing accounts. A high NRR indicates that CS is effectively nurturing and growing customer relationships, reducing churn, and driving upsell opportunities.

> **How to Leverage NRR**
>
> Regularly monitor accounts for expansion opportunities and proactively identify customers at risk of churn. Use this data to drive retention and upsell initiatives.

Customer Lifetime Value (CLTV)

CLTV measures the total revenue a customer is expected to generate throughout their relationship with your company.

CS teams can impact CLTV by ensuring product adoption, preventing churn, and fostering long-term relationships that lead to repeat business and upselling.

> **How to Leverage CLTV**
>
> Track customer engagement and identify patterns of success. Use these insights to deliver more personalized experiences, driving further engagement and higher value.

Churn Rate

Churn rate is a direct measure of customer retention. A high churn rate signals that CS is not effectively demonstrating value to customers. Conversely, reducing churn shows the impact of CS's proactive efforts.

> **How to Leverage Churn Rate**
>
> Focus on early warning indicators (such as drops in usage or customer complaints) to prevent churn before it happens. Use these insights to refine customer success strategies and minimize risk.

Expansion Revenue (Upsell and Cross-sell)

Expansion revenue measures the growth in revenue from existing customers through upselling or cross-selling.

This is one of the most straightforward ways to demonstrate the direct value of CS. A proactive CS team will identify opportunities for additional value, leading to increased revenue per customer.

> **How to Leverage Expansion Revenue**
>
> Track the success of your upsell and cross-sell efforts, and correlate them with customer engagement and satisfaction. This data shows how CS contributes directly to the company's financial growth.

The Best Way to Track and Communicate These Metrics

Tracking these key metrics requires a combination of tools, processes, and a solid data strategy. You need systems that surface the right insights and tell a story that resonates with business leadership.

Start by building a centralized Customer Success dashboard. Whether you're working with Velaris, Salesforce, Gainsight, or another tool, the goal is simple: have one live source of truth that visualizes key metrics like NRR, CLTV, churn, and expansion revenue, as well as intermediate signals like product usage and adoption milestones.

A well-designed dashboard keeps your team focused on what matters, aligns reporting across stakeholders, and creates a single picture of CS impact at a glance.

Next, make reporting a habit. Deliver monthly updates with highlights and trend analysis, and dive deeper in quarterly business reviews (QBRs).

Pro Tip

Contextualize the data you present to executives instead of just highlighting what your team achieved. Show how customer growth, renewals, or expansions happened despite a volatile market or tightening budgets. Framing your impact within the broader business climate reinforces that CS is creating stability in uncertain times.

But don't stop there. Automate wherever you can: set up alerts for usage dips, upcoming renewals, or expansion triggers. That frees your team from routine checking and gives them room to dig into high-leverage conversations.

At the same time, hold regular stakeholder syncs, like monthly GTM meetings, or quarterly OKR check-ins. These keep CS metrics top of mind across RevOps, Marketing, Product, and Sales. Bringing others along builds visibility and shared accountability.

Pro Tip

Publish a monthly "CS impact snapshot" slide in your GTM deck, showing top three wins, biggest at-risk accounts won back, and one notable expansion. Keep it short. One slide, no more than 3 bullet points is perfectly fine. Let it speak for itself.

As you can see, tracking and communicating isn't only about metrics. Crafting a narrative where CS is clearly seen as a business engine is also part of the strategy.

When your data is systematic, timely, and contextualized, you evolve from the team that reports churn to the team that delivers insights leadership can act on and proves Customer Success is essential to growth.

Using AI to Prove and Scale CS Impact

To prove Customer Success is a value-driving function, you need to be able to rely on data. But most importantly, you need clarity in data.

AI helps CS teams collect more data, but it also brings greater insight into that data. If you configure and use it right, AI can surface insights that directly tie your work to business outcomes.

By analyzing patterns across customer behavior, product usage, and engagement, it can tell you *which accounts are likely to churn, which ones are primed for expansion, and which signals need your attention now.*

With that level of clarity, your team can act fast and stay focused where it matters most. Some practical ways AI can help you include:

> → **Predictive Signals:** AI can forecast churn or expansion potential using usage trends and historical behavior, helping CS teams engage proactively before it's too late.
>
> → **Smarter Health Scores:** Rather than relying on static scoring models, AI-enhanced health scores adapt in real time based on sentiment, engagement, and feature adoption.
>
> → **Customer Sentiment at Scale:** AI can scan emails, calls, and support tickets to detect frustration or loyalty. This makes it easier to prioritize risk and advocacy plays.
>
> → **Freeing Up Time for Strategy:** AI can automate low-value tasks like data entry, reporting, and health check summaries. That gives your team more time to focus on revenue-driving activities like strategic planning, upsell orchestration, and executive alignment.

In a world where CS is under pressure to prove its value, AI could give you the edge to take action that impacts retention, expansion, and long-term customer growth.

AI Tools Worth Exploring

1. CustomerGauge

What it does:

CustomerGauge is a B2B-focused Account Experience platform that helps you link Net Promoter Score (NPS), customer feedback, and revenue metrics. It identifies where value is being created, or lost, across accounts.

Why it's valuable:

It ties feedback to revenue so you can clearly show which accounts are at risk or ready to grow. This helps CS leaders quantify how relationship strength correlates with upsells, renewals, and churn risk across accounts.

How to use it for CS:

Use NPS and feedback data to segment accounts and align CS plays with revenue opportunities. Reference it in your executive reviews to show how advocacy drives growth, or where lack of engagement signals risk.

2. Zendesk

What it does:

Zendesk provides a robust customer support platform that captures sentiment and issues trends from support tickets.

Why it's valuable:

Support interactions offer a goldmine of signals. Zendesk's sentiment tracking and ticket tagging can give CS teams early alerts when something's going wrong, before it impacts renewal.

How to use it for CS:

Collaborate with Support to flag high-value accounts that show frustration. Feed that insight into your QBRs and playbooks, showing how CS is solving issues before they become business problems.

3. Woopra

What it does:

Woopra is a customer journey analytics tool that tracks users across touchpoints, like websites, products, emails, and more.

Why it's valuable:

It provides a timeline view of each customer's journey, helping CS teams understand exactly where drop-off happens and which experiences correlate with long-term retention or upsells.

How to use it for CS:

Map high-retention behaviors across touchpoints and reverse-engineer them into onboarding or adoption strategies. Use journey analytics to show where CS makes the biggest impact on long-term success.

4. Mixpanel

What it does:

Mixpanel gives deep insights into how users interact with your product. It supports cohort analysis, funnel visualization, and retention tracking.

Why it's valuable:

You can track behavior patterns across large user bases, which helps uncover opportunities for broader adoption or identify friction points leading to churn.

How to use it for CS:

Run cohort analysis to identify which behaviors predict renewal. Pair that data with your outreach to show how CS interventions lead to value realization and revenue lift.

5. Velaris

What it does:

Velaris brings together customer data, signals, and automation into one intelligent CS platform. It helps teams orchestrate renewals, expansions, onboarding, and more.

Why it's valuable:

It connects product usage, CRM data, support trends, and sentiment analysis to give CS teams a complete view of each account. Built-in automation ensures nothing falls through the cracks.

How to use it for CS:

Track revenue-influencing metrics like NRR, expansion triggers, and adoption milestones in one place. To go a step further, you can automate alerts, playbooks, and reporting to move from reactive firefighting to strategic execution.

Become The Voice That's Impossible To Ignore

The conversations you need to be having to demonstrate value.

Don't just ask for a seat at the table. Show them why you belong there.

For too long, Customer Success has fought to be seen as "strategic." But if the goal is real influence, it's not enough to be strategic. You need to shape strategy.

That starts by positioning CS not just as a function that supports customers, but as the team that knows the truth about what it takes to grow.

If you understand the customer's full journey, and have data to back it, you gain a unique vantage point. You can see what's working, what's broken, and what needs to change across the company.

Use that view to guide decisions within your organization, instead of being the ones always reacting to the decisions.

Influence cross-functional decision-making

Executive teams are often disconnected from what customers are actually experiencing. They make decisions based on gut feel, top-line metrics, or what Sales is hearing from prospects. That's where CS comes in.

As a CS leader, you're sitting on a stream of insights, like reasons why customers churn, where adoption stalls, and which features are fueling growth. When you bring those insights to the table (especially backed by data), you help shape strategy.

Pro Tip

Show up with context, instead of just quoting customer complaints. Saying "this customer said they are unhappy" won't cut it. Saying "30% of customers in our top tier are under-utilizing key features, and it's impacting renewals" makes people listen.

Be the voice of customer reality in executive planning

Customer Success is the only team consistently plugged in across accounts, industries, and lifecycle stages. You're seeing the full picture, so use that visibility.

When planning product roadmaps, pricing changes, or go-to-market strategies, CS should be at the table. Not to react, but to contribute. You know what's actually being adopted, what's confusing, and what customers value enough to pay for.

If you don't bring that reality into the room, someone else will. And they might just guess.

Pro Tip

Summarize key patterns from calls, support logs, and product usage into executive-ready storylines. Make it easy for your CEO or CFO to understand what customers really want and where the company is falling short.

Surface systemic issues that impact customer value and growth

Sometimes what holds customers back has nothing to do with the product, and has more to do with how the business operates. Maybe onboarding takes too long. Maybe support escalations are inconsistent. Maybe pricing is too complex.

These are cross-functional issues that CS feels first, but often struggles to escalate effectively. Don't stop at just flagging the problem. Frame it in terms of business impact.

If onboarding gaps are leading to delayed value realization, tie it to time-to-revenue. If pricing friction is hurting expansion, bring examples with lost ARR. The more you connect systemic issues to revenue or risk, the more likely you'll get buy-in to fix them.

Pro Tip

Start tracking these pain points systematically. A shared spreadsheet with patterns, customer quotes, and risk indicators can become a powerful tool in quarterly business reviews and exec syncs.

Use customer signals to guide resourcing and investment decisions

Your team knows where momentum is building and where red flags are starting to fly. Divert that insight from your usual firefighting to proactive forecasting.

If adoption in a certain segment is surging, push for more enablement or CSM support there. If churn is creeping up in a certain industry, raise it early and suggest adjustments.

Strategic CS leaders use their visibility to guide where the company should invest. This could be in onboarding headcount, success automation, or product features.

Pro Tip

Make your customer health data useful for more than just your team. Build one slide or dashboard that helps the entire exec team see where growth is likely, and where it's at risk.

Conclusion

The End of Justifying, The Start of Leading

Customer Success has proven its worth. Now, it's time to lead with clear business outcomes and drive growth through AI, smarter forecasting, and impactful customer engagement.

Conclusion: The End of Justifying, The Start of Leading

Customer Success has spent years trying to prove it deserves a seat at the table. But in this new era of outcome-based, AI-driven, margin-conscious growth, the current mainstream approach CS teams are taking isn't working.

Being seen as "strategic" isn't about being liked or being busy. It's about driving clear business outcomes.

Renewals, expansions, referrals, faster onboarding, and smarter forecasting are what your organization prioritizes. And CS has the insight and access to lead the charge on all of them.

There's no question about whether CS can deliver value. It's whether we take the right steps in creating that value, and making it visible, measurable, and scalable across every customer and every conversation.

Now it's time to turn insight into action

Use our custom worksheets and templates to implement what you've learned at your organization.

→ **"Cost Center to Value Driver" Self-Assessment**
Use this worksheet to evaluate how your CS team is currently perceived and where you may need to shift mindset, workflows, or reporting to become a strategic growth partner in the business.

→ **"Trusted Advisor" Meeting Prep Sheet**
Complete this sheet before any strategic check-in, EBR, or high-stakes customer call. Use it to center the conversation around the customer's priorities and proactively connect the dots to your product.

→ **Quarterly Executive Planning Cheat Sheet**
This worksheet helps you prepare for quarterly planning cycles by summarizing key insights, blockers, and cross-functional asks in a concise, exec-ready format.

→ **Customer Insights to Exec Storylines Worksheet**
This worksheet helps turn day-to-day customer signals into compelling, outcome-focused narratives for executive stakeholders.

→ **CS Business Outcomes Tracker Template**
Use this spreadsheet to connect day-to-day CSM actions to measurable business outcomes.

→ **Specialized CS Roles Planning Canvas**
Use this worksheet during team offsites, CS strategy reviews, or quarterly planning cycles. It's best completed collaboratively with team leads or senior CSMs.

→ **Cross-Functional Feedback Loop Tracker**
A shared spreadsheet that allows Customer Success to log, track, and resolve recurring issues that impact the customer experience.

→ **CS Metrics Reporting Template**
This template will help you concisely communicate their team's performance, insights, and strategic needs to execs.

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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