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Customer Success Competency Model.

A way to measure a person's performance against their potential in a role — three disciplines, twelve competencies, each at low, moderate and high complexity, with the interview questions to find them.

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CONTROL

Twelve revisions.

VERSION	DATE	AUTHORITY	NOTES
1.6.0	November 1, 2026	Juan Carlos González II	Exhibit C, the Customer Success Operations Manager; Part V, job architecture — the role profile, the Operations track, the role brief; the lineage before 1.0.0; vendor names generalized in the matrix and in Exhibits A and B
1.5.2	October 27, 2026	Juan Carlos González II	Summary aligned to the twelve competencies; Gains Consensus on Outcomes confirmed under Bias for Action; designed edition
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1.1.0	December 15, 2020	Juan Carlos González II	Competency Area Interview Questions
1.0.0	December 7, 2020	Juan Carlos González II	Initial Authorization

Before this table. The model was first authorized on November 7, 2018 (1.0.0), as Vice President of Customer Success at a managed file transfer and network management software company; its interview questions followed on November 15, 2018 (1.1.0), and its job descriptions on January 9, 2019 (1.2.0). It was carried to a financial services software company in 2019 and rebuilt in December 2020, and the numbering restarted each time — the table records the line that leads to this edition. Its earliest form was a 2017 career-pathing sheet at a hospitality-software company in the Vista Equity portfolio.

HOW TO READ THIS DOCUMENT

Pages 4–11 are the model itself — three disciplines, twelve competencies, each described at low, moderate and high situational complexity. They are domain-agnostic. **Pages 12–24** are the Customer Success ladder: what every competency looks like for each of four roles. **Pages 25–37** are the interview bank, mapped to the Employee Personality Profile. **The exhibits** are three job descriptions built from the model, and **Part V** is the job architecture: the role profile, the Operations track, and the role brief.

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THE MODEL

Everyday Leadership.

Customer Success is an executive profession grounded in the conviction that each individual contributor can make a tremendous impact on Juan.co's success through their daily actions – not just when they hold a specific title or reach an arbitrary milestone. Everyday Leadership is about advocating for an incredible experience through high performance and successful outcomes, both for our clients and our team members. The Customer Success Competency Model describes the key behaviors that exemplify the actions needed to be successful in any role at Juan.co by delivering business impact to our customers and our company.

Competencies are general terms that describe knowledge, skills, and abilities that determine how a part of a role or responsibility correlates with performance. Competencies are measured against well-accepted standards and are improved through experience and education. The Customer Success Competency Model abstracts competencies through the lens of successful outcomes into strengths needed to execute effectively as a leader. At the heart of this model are core values and our vision for the company, and radiating from this vision are the three disciplines that are essential to success as an executive at Juan.co:

DISCIPLINE

Strategic Thinking

Exercise Disciplined and Strategic Thinking by identifying and analyzing applicable information in order to resolve blockers and improve results.

- **Strives for Continuous Improvement**
- **Creative and Rigorous Problem Solving**
- **Comfort with Complexity and Ambiguity**
- **Demonstrates Good Judgment**

DISCIPLINE

Bias for Action

Demonstrate a Bias for Action which includes managing time and resources effectively, and prioritizing efforts in alignment with organizational goals.

- **Organizes Work using Processes**
- **Manages Resources Effectively**
- **Aligns Priorities and Efforts to Goals**
- **Gains Consensus on Outcomes**

DISCIPLINE

Building Effective Relationships

Build Effective Relationships through collaborating with both internal and external parties to achieve mutually beneficial outcomes.

- **Conveys Information Clearly**
- **Builds Authentic Relationships**
- **Inspires and Motivates Others**
- **Resolves Conflict through Empathy**

THE MODEL

Situational complexity.

Individual team members demonstrate proficiency in each of the competencies that fall under the three disciplines above based upon their role's relative responsibilities. Situational Complexity manifests into low, moderate, and high expectations for how these competencies are executed with successful outcomes.

The same behavior means something different at a different altitude. Every competency in the matrix that follows is therefore described three times — what it looks like, what proficiency means there, and a concrete example — so that a *role* can be placed on the scale, and a *person* measured against the rung they hold and the one above it.

LOW

The ground is known. Processes, tools and relationships are established by others; the work is to use them well, learn from one's own outcomes, and escalate when the pattern breaks.

MODERATE

The ground shifts. Problems must first be defined; solutions adapt known approaches; the individual improvises inside the playbook and improves the team's systems, not only their own.

HIGH

The ground is unmade. Cause and solution are unknown; standards must be invented; the individual leads others through ambiguity and is accountable for outcomes they cannot yet measure.

READING THE MATRIX

Each competency card carries its definition at left and three columns at right. The first sentence of each column describes the situation; **Proficiency means** describes the bar; **Examples** are drawn from Customer Success but travel. Customer Success as a domain runs moderate to high; most individual-contributor roles sit at moderate with two or three behaviors that run high.

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COMPETENCIES MATRIX · STRATEGIC THINKING

Strategic Thinking.

Strives for Continuous Improvement

Self-driven focus on continuous learning and improvement; upholds accountability for achieving intended outcomes.

LOW

Performance improvement is typically limited to one's own development. Actions to improve are clear.

Proficiency means learning from past actions and outcomes to improve work quality consistently.

EXAMPLES Self-improvement to one's own workflow; listening to one's own prospecting calls; others' feedback.

MODERATE

Focus is on incremental improvement to solutions or team processes, systems and performance.

Proficiency means learning from the past actions and outcomes of others to improve in quality of solutions consistently.

EXAMPLES Providing coaching feedback on Tier 1 case resolution; conducting deal reviews to increase win rate.

HIGH

Standard metrics for measuring success must be developed. Improvement may involve systemic changes.

Proficiency means identifying actions to drive improvement, while also maintaining accountability for achieving the outcomes.

EXAMPLES Enhancing our product architecture; increasing revenue growth; market penetration of product.

Creative and Rigorous Problem Solving

Using rigorous logic to define problems, generate effective solutions, and anticipate hidden challenges.

LOW

Problems are well defined, with precise data used to identify the situation. Solutions tend to follow a routine cause-effect relationship.

Proficiency means quickly defining the problem and applying the most effective solution – not necessarily the most obvious one.

EXAMPLES Resolving Tier 1 issues using best practices; following process for nurturing prospects; solving internal help desk tickets.

MODERATE

Problems must first be defined. Solutions may be new, or adaptations of known approaches, and may require actions on the part of others.

Proficiency means using observations and data to define the problem, and proposing a well-constructed solution.

EXAMPLES Designing and delivering training to address skill gaps in team members; proposing new account or onboarding workstreams to reduce support tickets.

HIGH

Both the cause and the solution remain unknown and problem-solving involves monitoring both leading indicators and lagging outcomes.

Proficiency means using a disciplined and data-driven approach to defining the problem, testing sustainable solutions.

EXAMPLES Improving the reliability of our product infrastructure; changing our product positioning or pricing to increase win rate; reducing performance-based team attrition.

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Comfort with Complexity and Ambiguity

Able to navigate complexity and ambiguity comfortably. Demonstrates curiosity and openness when faced with unknown situations.

LOW

Ambiguity experienced is typically organizational with limited uncertainty about the tasks at hand.

Proficiency means filtering for ambiguity that impacts the goals at hand, instead of being reactive to atmospheric complexity.

EXAMPLES Asking for clarity on code requirements; changing prospecting pitch to test new approach; learning to resolve release issues reactively.

MODERATE

One must identify where ambiguity is a true blocker to forward momentum, as opposed to a perceived blocker.

Proficiency means developing strategies on how to move forward given anticipated levels of ambiguity and risk.

EXAMPLES Describing new features to customers or employees before release; testing feature configuration issues to create support articles; developing sales strategy based on customer feedback.

HIGH

Responsibilities include leading through change and providing clarity for others despite ambiguity.

Proficiency means understanding how undetermined factors might impact the work, and mitigating those risks as possible.

EXAMPLES Implementing broad actions to reduce business risk; reducing ambiguity through effective proactive communication around large scale org-wide changes.

Demonstrates Good Judgment

Selects appropriate data for analysis and uses rigor and intellectual horsepower to drive decision quality.

LOW

Decisions are low-risk and typically follow a predictable pattern with models of past success. Proficiency meals using good judgment to select the appropriate course of action given the situation at hand and data available.

EXAMPLES Choosing the correct template to send emails to prospects; matching the customer challenge to the appropriate corresponding playbook.

MODERATE

Judgment involves evaluating the risk with decisions using vetted evidence, and escalating as appropriate.

Proficiency means suggesting mechanisms for systematic validation of information received to ensure high-quality decisions.

EXAMPLES Determining when additional resourcing is required to meet a project deadline; making hiring decisions; reporting a product bug.

HIGH

Decisions must be made with available information, which is often incomplete or unclear.

Proficiency means rigorously questioning assumptions and understanding which information is best used to make a decision.

EXAMPLES Selecting go-live dates for meaningful product changes; pursuing business partnerships or acquisitions; setting forecast assumptions.

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Bias for Action.

Organizes Work using Processes

Utilizes organizational systems and processes to get work done with efficiency.

LOW

Processes and best practices are well established. There is sufficient support for their practical use.

Proficiency means managing individual work effectively, delivering against known goals and deadlines.

EXAMPLES Tracking daily activities against Tier 1/BDR, SLAs/goals; releasing tested and reviewed code.

MODERATE

One must drive adherence to processes and best practices within a team or project group.

Proficiency means managing project and program work effectively, delivering against known goals and deadlines.

EXAMPLES Driving SME completion of training; ensuring on-time development of product ships; managing pipeline.

HIGH

New systems, routines, and practices must be developed and implemented within the organization.

Proficiency means using data to ensure the developed systems and processes are impacting our goals.

EXAMPLES Tracking multiple concurrent engineering projects; designing or adapting the CRM's architecture and core workflows.

Manages Resources Effectively

Accurately scopes the work at hand and secures the time and resources needed.

LOW

There are known and predictable models of success in terms of how to allocate one's own time.

Proficiency means matching the situation at hand with the appropriate playbook to meet goals and solve problems.

EXAMPLES Engineer completing on-time ship of own code; completing tasks in advance of customer go-live; using knowledge base articles to resolve Tier 1 customer issues.

MODERATE

Individuals are leveraging known and successful capacity and resource plans for attaining project, program, or team goals.

Proficiency means contextualizing a known playbook given unexpected circumstances to meet goals and solve problems.

EXAMPLES Managing multiple individuals deploying code for a feature; tracking completion, and ensuring deployment of ta raining program.

HIGH

The Individual holds responsibility for determining the budget and allocating for the resources needed.

Proficiency means using data and evidence to develop a budget and resource plan, as well as adjusting that plan and adjust it over time.

EXAMPLES Long term phasing of roadmap delivery; team capacity planning and budgeting to meet SLAs and goals.

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Aligns Priorities and Efforts to Goals

Understands how work is aligned to overarching priorities and goals, prioritizing efforts accordingly.

LOW

Goals are defined and communicated by others, with limited autonomy in terms of priorities.

Proficiency means correctly identifying the cause of a problem or situation and applies the appropriate solution.

EXAMPLES Understanding the scope of a feature sprint; prioritization of recruitment sourcing; resolving issues efficiently to meet SLAs.

MODERATE

The individual is monitoring progress towards defined team or project goals, and there is some autonomy in shifting the priorities of others.

Proficiency means using autonomy to correctly identify the cause of a problem or situation, and applies the appropriate solution.

EXAMPLES Product Manager prioritization of feature enhancements across releases; Customer Success Manager working with multiple business units to fully resolve a customer issue.

HIGH

The organization has a high degree of dependency on the department's ability to achieve its goals.

Proficiency means thinking critically about how all individuals contribute to broader goals, and maintaining focus on those priorities.

EXAMPLES Designing quota and commission plans to meet revenue goals; increasing revenue retention through department-wide goals.

Gains Consensus on Outcomes

Develops agreement and delivers alignment on mutually beneficial outcomes by leveraging partnerships.

LOW

The Outcome is typically mutually beneficial and therefore requires limited consensus building.

Proficiency means leading a discussion between partners about how each will contribute to the outcome.

EXAMPLES Coordinating implementation activities; setting pricing for customers; escalating tickets for support.

MODERATE

The Individual is typically managing with indirect authority through influence, typically requiring some consensus building.

Proficiency means maintaining conditions of support for necessary action, despite competing priorities.

EXAMPLES Maintaining buying momentum during a sales cycle; Customer Success Managers ensuring support resolves all customer issues; working with managers on hiring and team development initiatives.

HIGH

Consensus is not required and decisions made may not be equitable beneficial to all parties involved.

Proficiency means maintaining coalitions of support for the outcomes, despite competing needs or dissenting views felt by partners.

EXAMPLES Setting approach to product development in order to meet multiple business objectives; determining how one team will contribute to the goals of another; maintaining momentum through effort.

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Building Effective Relationships.

Conveys Information Clearly

Conveys relevant information clearly choosing appropriate tools and media based on the audience and situation.

LOW

Others have established communication methods and tools.

Proficiency means selecting the appropriate communication method and tool given the information.

EXAMPLES Delivering an initial prospecting pitch; resolving Tier 1 issues for customers; and replying to internal emails.

MODERATE

The Individual drives the adaptation of known communication methods, tools, and repeatable routines.

Proficiency means adapting effective communication methods and tools given the audience and information.

EXAMPLES Delivering a sales demonstration tailored to customer needs; providing direction to a project team; completing a business review.

HIGH

Individuals must develop appropriate tools, resources, and communication habits.

Proficiency means developing effective communication methods and tools that result in stakeholder enablement or action.

EXAMPLES Articulating impact and risk of ideas to our business; conveying org-wide policy shifts; designing new product builds standards.

Builds Authentic Relationships

Practices active listening to create authentic relationships built on trust.

LOW

Relationships are defined in advance and the partners share aligned goals and objectives.

Proficiency means engaging with authenticity and empathy, and nurturing genuine relationships.

EXAMPLES Establishing AE relationships; Tier 1 to Customer relationships, or Peers in Engineering.

MODERATE

Relationships are with internally aligned teams; mutual objectives and goals may need to be established.

Proficiency means maximizing defined relationships so that mutually aligned goals and objectives are achieved.

EXAMPLES Sales to post-sale; Recruiting with hiring managers; Support to the Product team.

HIGH

Relationships must be formed with partners that have independent needs and goals.

Proficiency means maximizing those relationships, such that both parties aid one another in their respective goals.

EXAMPLES Estabioshing Customer Success Managers to Customer relationships; Managing relationships with Boards or third-party development groups.

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Inspires and Motivates Others

Communicates a vision that inspires and motivates others, adapting the message according to the audience and venue.

LOW

The Vision has been created and tailored, and delivering guidance has been provided based on the audience.

Proficiency means choosing the guidance that best matches the audience, accurately delivering that message.

EXAMPLES Engineering creating quality code for others; prospecting to set a meeting; delivering training to customers.

MODERATE

Generic Vision has been created and delivering guidance has likely been provided, but both may need to be tailored based on audience.

Proficiency means motivating aligned stakeholders by communicating a vision that is adapted to their context and needs.

EXAMPLES Writing marketing content; training on product release; recruiting candidates.

HIGH

The Vision must be first defined and then systematically ingrained into the culture and norms of an organization.

Proficiency means motivating key influencers so that they can share and reinforce the message with others.

EXAMPLES Change management activities, such as new product positioning or team structures and activities.

Resolves Conflict through Empathy

Acknowledges and incorporates the perspectives of others into conflict resolution.

LOW

Conflict may be the result of interpersonal differences or differing approaches to a task.

Proficiency means approaching those situations with maturity using behaviors of inclusion and positive communication techniques to resolve the problem.

EXAMPLES Disagreements with peers related to work approach or preferences.

MODERATE

Conflict may be the result of competing priorities or misalignment on outcomes.

Proficiency means reducing potential conflict by proactively nurturing relationships with aligned individuals.

EXAMPLES Product manager scrums with Engineers; Talent Business Partner check-ins with managers; Project Managers with solutions or services specialists.

HIGH

Conflict may be philosophical and resolution may require real empathy and humility.

Proficiency means recognizing the merits of opposing viewpoints. It also means reducing conflict by proactively nurturing the relationships to align perspectives better.

EXAMPLES Product roadmap alignment with sales priorities; operating plan development; cross-functional goal setting.

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II

Customer Success Competencies.

Customer Success, in general, is a moderate to high situational complexity domain. The professional has to apply a series of best practices and continually-evolving body of knowledge, skills, and abilities to well-understood situations, and innovates and architects novel solutions to primarily complicated circumstances or ambiguous problems with contentious stakeholders, concurrently mitigating for unknown risks.

Twelve competencies, four rungs each — Customer Success Manager I and II, Senior Customer Success Manager, Manager of Customer Success — with a definition and an example at every rung. The next rung's definition is the development plan.

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BIAS FOR ACTION

Organizes Work using Processes.

CSM I **Customer Success Manager I**	DEFINITION Demonstrates an understanding of how to make use of documented processes and supported best practices, while also executing on timely, relevant approaches to addressing organizational needs. Primarily low complexity in the use of pre-existing playbooks and success plays; minimal customization or improvisation.	EXAMPLE Manage customers who match specific criteria for operationalizating an existing playbook or process to bring that customer back to a normalized or de-escalated state. Identification of other like-customers comparing similar measures and applying of appropriate and relevant solution process or success play.
CSM II **Customer Success Manager II**	DEFINITION Requires using pre-existing best practices for the Customer Success domain while also improvising and delivering new solutions grounded in data and results. Customer Success Managers must identify high-performance work opportunities and efficiently employ both standard predefined processes and innovate new workflows and solutions to deliver results.	EXAMPLE Proactively manage customers that show signs of moving to 'Yellow' or 'Red' health status, and build a plan to address (including using pre-established playbooks, or creating your playbook, as appropriate). Record of executing Success Plays in systems and adaptation of other plays for specific circumstances in CSM's book of business.
SENIOR CSM **Senior Customer Success Manager**	DEFINITION Has built new workflows or processes, practice areas, or skills that have been successfully deployed to organize work. Consistent demonstrated evidence of innovation and improvisation of prior approaches to adapt to unique circumstances. High complexity role that continues to defines excellence in the Customer Success domain that leads through example.	EXAMPLE Design a workflow and its associated documents or templates used to manage a customer through a typical challenge or stage in the Customer Journey.
MANAGER **Manager of Customer Success**	DEFINITION Has cultivated, repeatedly practiced [independently] and deployed to a Program; workflows, processes and skills that have been administered to streamline tasks. A complex role that surfaces efficient behavior within the Program under the Customer Success organization fosters empowerment for the individual contributor.	EXAMPLE Standardize an existing workflow and its coinciding collateral used to manage enterprise/key strategic customers when delivering a business review held on-site.

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BIAS FOR ACTION

Manages Resources Effectively.

CSM I **Customer Success Manager I**	DEFINITION Demonstrates the ability to evaluate challenges and opportunities and assign the corresponding resources to execute against them properly. Understanding of high touch and low touch levels of effort and their associated approaches, proactive and reactive modalities of engagement.	EXAMPLE Accurately determine, forecast, and plan when a customer requires a Business Review (High Touch, Proactive), Adoption Workshop (High Touch, Reactive), Success Engagement (Low Touch, Proactive), or Feedback Loop (Low Touch, Reactive) approach and execute effectively.
CSM II **Customer Success Manager II**	DEFINITION This role requires the professional to use industry-standard and team-appropriate playbooks to execute on adoption, business reviews, customer satisfaction, and attitudinal loyalty campaigns (including learning and development and roadmap alignment). It also necessitates improvisation to build engagements by leveraging data and constructing custom engagements with resources and staff.	EXAMPLE When assembling a play to help a customer with, for instance, a training need, the Customer Success professional will engage the right stakeholders. They will also employ the proper tools (online learning, phone call, in-person meeting, etc.) that is appropriate for the client's significance and the risk of that client churning.
SENIOR CSM **Senior Customer Success Manager**	DEFINITION Has designed an approach by mapping resources against data and evidence appropriately, built a scalable solution for customers that can be operationalized and adapted for a use case that is non-specific and adjustable based upon the unique challenge or opportunity that the customer has encountered.	EXAMPLE Create a new success play, or modify an existing success play, that uses multiple stakeholders across the organization to deploy solutions to the customer; outline critical criteria, requirements for engagement, and measures of success. Then, evangelize and train others on the use and execution of this approach.
MANAGER **Manager of Customer Success**	DEFINITION Leverages and deploys to Program an efficient approach using resource mapping with supporting information. They engineer a scalable solution for the program to aid strategic enterprise and key account customers. This solution can be operationalized and adapted for a use case that is nonspecific and interchangeable based upon the unique challenge or business case that the customer has encountered.	EXAMPLE Standardizes the process of creating a new success play. Use techniques that encourage the Program to think critically in a solution-driven manner. Use internal resources (cx tracker, success criteria, open items and a next step timeline). Track these success plays' utilization and win rate of these success plays by holding recurring (PRMs) Program Resource Meetings.

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BIAS FOR ACTION

Aligns Priorities and Efforts to Goals.

CSM I

Customer Success Manager I

DEFINITION

Demonstrates the ability to capture business goals and objectives, deconstruct the intent against a challenge or problem, and successfully apply the proportionate effort to ensure the business goals or objectives are met. Can measure success and communicate back to stakeholders.

EXAMPLE

Successfully identifies problems and key stakeholders involved; proven coordination and escalation to relevant parties. Manages communication with the customer and drives timely and appropriate follow-up with all stakeholders to ensure progress against objectives. Follow through to completion as necessary.

CSM II

Customer Success Manager II

DEFINITION

Requires execution in a high complexity environment: multiple stakeholders and team members contribute to goals and will require prioritization, facilitation, coalition-building, and articulation of a focused plan in a highly autonomous situation; problems are both identified and solutions are architected by the professional from among the perspectives of multiple participants.

EXAMPLE

Deconstructs a challenge or problem into which stage of the Customer Success Journey is applicable, and which relevant stakeholders and organizations are involved. Consequently, they convene relevant stakeholders and facilitates a solution by brokering a project plan and ensuring that it is correctly executed across all teams.

SENIOR CSM

Senior Customer Success Manager

DEFINITION

Leads the customer success function in architecting programmatic initiatives against complex, multivariate deals or challenges with competing priorities and constrained efforts. Directs stakeholders to achieve alignment on the definition of success and measures against the objective, and then project manages the action through all stages of a resolution lifecycle. Comprehensively reports back to all stakeholders, customers, and the customer success organization at large the initiative's results.

EXAMPLE

Assist the product or sales organizations in the pursuit of a new or complex deal; facilitate an approach that incorporates the stakeholders' perspectives and the challenges or opportunities posited by the customer. Organize a solution play that aligns activities against intended results, and both coordinates and manages the efforts of others to win the deal successfully.

MANAGER

Manager of Customer Success

DEFINITION

Standardization of programmatic initiatives for intricate opportunities or challenges. Ability to prioritize seemingly equally practical tasks with the Program and its customers. Directs Program with the utilization of tools for 'open item priority alignment' (recap/overview of communication effort) to educate stakeholders on the definition of success.

EXAMPLE

Guides Program on opportunities for proper engagement with the product or sales organizations in the pursuit of a new or complex deal; facilitates an approach that incorporates the perspectives of both multiple internal stakeholders and the challenges or opportunities posited by the customer. Coaches Program on how to organize a solution play that aligns activities against the intended result. Both coordinates and manages the efforts of others to win the deal successfully.

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BIAS FOR ACTION

Gains Consensus on Outcomes.

	DEFINITION	EXAMPLE
CSM I **Customer Success Manager I**	Demonstrates communication fluency to identify agreement areas, and drives conversations with stakeholders that align with how their activities will achieve the desired outcome.	Manage a recurring check-in with a customer and identify shared responsibilities and activities to bring an escalation (project, case, or issue) to a successful resolution.
CSM II **Customer Success Manager II**	Complexity poses a scenario that consensus may not be easily obtained and decisions may ultimately require forging a coalition of stakeholders to support outcomes. Customer business priorities will need to be aligned with the product roadmap and communicated to resolve competitive or dissenting views.	Confront a problematic issue with a customer and build a working agreement to move forward on the relationship. The case involves actively engaging multiple stakeholders, both at the company and in the client organization; creating alignment will require political skill to convince stakeholders that they are directing outcomes that, ultimately, the Customer Success professional controls in the interests of customer loyalty.
SENIOR CSM **Senior Customer Success Manager**	Navigates complex outcomes by building solutions that may not necessarily be equitable to all stakeholders, but around which dissenting views or competing needs can be overcome. Consensus is sometimes unachievable, and undesirable, as the Customer Success professional advocates for the greater interest of the successful business relationship. Demonstrates building coalitions to maintain support amidst challenging changes or issues.	Manage challenging and/or complex change with multiple stakeholders. Identify risks associated with the deployment of change and mitigate by organizing an executive framework and gaining alignment (or at the very least agreement) on desired outcomes and success measures for the change across all stakeholder groups.
MANAGER **Manager of Customer Success**	Leads by example and coaches Program to find direction and 'path paving' within complex outcomes. Identification of overall wellness outcome which may or may not result in consensus but will have an impactful and positive over-arching theme. Over communicates role objective to drive success for customer by working in a seamless fashion cross departmentally.	Provide support for Program and customers by managing challenging and complex changes with multiple stakeholders (internally and externally). Offers coaching for the Program to identify risks related to change with proper alignment on key outcomes (success criteria) for the change across all stakeholder groups.

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STRATEGIC THINKING

Strives for Continuous Improvement.

CSM I **Customer Success Manager I**	DEFINITION Demonstrates the capability to identify inefficient processes or programs, either at the company or customer organizations, formulate a plan of remediation, and execute this plan or project to enhance the operational weakness; evidence of amelioration of a process ownership and continuous improvement.	EXAMPLE Without reinventing the process, the Customer Success professional correctly identifies a deficient program, such as a customer's practice in reviewing reporting and applying them to their business decision-making. Builds an intervention plan to assist the customer in improving this practice; owns continued follow-up to verify improvement overtime and addressing the underlying deficiencies.
CSM II **Customer Success Manager II**	DEFINITION Requires identifying actions, including organization and process re-engineering, driving improvement, and optimizing results for teams and individuals alike. Advocating for the customer requires continually challenging conventional thinking and consistently seeking efficiencies and higher performance across the organization and its teams.	EXAMPLE If the normal process of delivering a costumer’s solution is not producing results, the Customer Success professional must create a new method, sometimes from scratch, to replace the aging process. Additionally, sometimes the customer will need to be convinced of the need to adopt this change to be successful.
SENIOR CSM **Senior Customer Success Manager**	DEFINITION Owns and develops measures that set the standard for cross-functional operational excellence across the organization and provoke change at the company across departments and teams. Track record of proactively identifying deficient processes and re-engineering them while concurrently owning consequences and measures of success (and outcomes) against which they are measured.	EXAMPLE Leads an operational center for excellence at the company and is recognized as a process optimization re-engineer within the Customer Success Organization; owns a cross-functional practice area with material and functional impact on client services or the customer experience (such as a product task force or similar).
MANAGER **Manager of Customer Success**	DEFINITION Exemplifies ability to provide constructive feedback with self, team, processes and product. Surfaces and identifies improvement opportunities. Identifies said opportunities and shares with Program and customer, fostering an opportunistic perspective throughout obligation.	EXAMPLE Administer 'Success Stories Success Play' to Program and customers "You Asked, We Listened" effort. Works with Program to identify which customers and their specific scenarios helped 'move the needle' regarding the product. Facilitates by showcasing feature requests that have shipped and made a tremendous impact on the customer base.

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STRATEGIC THINKING

Creative and Rigorous Problem Solving.

CSM I **Customer Success Manager I**	DEFINITION Demonstrates capacity to evaluate problems against a framework of well-defined issues and can match those concerns against a predictable routine to address by using data. Can apply the most effective solution by performing considered analysis and can synthesize recommendations for maintaining the solution's high performance against the original problem set while countering temptations to apply the most obvious answer.	EXAMPLE Manage and address a customer escalation by challenging the underlying assumptions and re-classifying the problem in the most straightforward and most precise terms. Then, implement a not obvious solution but is effective based upon both the data available and other similar use-cases; follow-up and gain agreement with the customer on both definitions of success and corresponding successful outcomes.
CSM II **Customer Success Manager II**	DEFINITION Manages both problem-solving of complexity classes: Low, or well-understood problems many customers face and resolved through a standard playbook or escalation tree; and High, or poorly understood problems or challenges requiring a deeper dive to identify root causes and data that will lead to a plan to resolve the underlying challenges through a data-centric, results-oriented approach.	EXAMPLE Customer Success professionals must be willing to challenge assumptions and ask if what the stakeholder (either the company or the customer) is saying is accurate or, alternatively, if the underlying problem is something that hasn't been considered before. The solution must be based upon data -- What is the definition of success to solve this problem? And how can we measure our progress towards or achievement of success?
SENIOR CSM **Senior Customer Success Manager**	DEFINITION Manages the monitoring of signals, leading indicators, and lagging outcomes of ambiguous and unknown problems whose root causes are indeterminable or overly complicated. Represent clear evidence of utilizing disciplined and comprehensive execution of approaches that are grounded in data with ongoing calibration and iteration of methodologies to define the problem and test the efficacy of solutions to meet customer and organizational needs.	EXAMPLE Probes non-consolidated and unactionable feedback from a customer or stakeholder to build a framework of pain points, challenges, opportunities, and risks, and manages these underlying behaviors against hypothetical root causes which are addressed using a series of innovative, customized, and creative success engagements. Addressing the underlying challenge yields a well-defined description of the problem, which is ultimately determined by the solution that the Customer Success professional developed and developed effectively.
MANAGER **Manager of Customer Success**	DEFINITION Continuously displays healthy curiosity accompanied by a strategic/complex outlook of the "big picture" goal. The individual participates in various troubleshooting sessions that directly correlate to complex issues that frequently arise. Provides documentation to support and guide Program and customers through rigorous scenarios.	EXAMPLE Ongoing workshops/sessions held for the Program and its customers provide a detailed explanation of the various outlets/resources at their disposal. Deploy an organizational "How-To" to Program (internal doc) and customers (external doc).

STRATEGIC THINKING

Comfort with Complexity and Ambiguity.

CSM I **Customer Success Manager I**	DEFINITION Demonstrates an understanding of organizational decision-making and can filter contextual complexity to only ambiguity that impacts goals and tasks. Able to diagnose and deconstruct complex or ambiguous issues into core components and execute around underlying issues without expending efforts reactively to this complexity.	EXAMPLE When the actual decision-maker at a client organization is challenging to ascertain, the Customer Success Manager can identify how decisions are made (if not necessarily who makes these decisions) and whether these pose dependencies or milestones for operating work. When a decision-making structure is anticipated to impact their work, there is evidence of proactive escalation and engagement to manage the risk.
CSM II **Customer Success Manager II**	DEFINITION Requires a high degree of comfort with complexity and ambiguity; change management is a central challenge both our customers and our internal teams face. Customer Success must drive change and hold team members accountable for performance across both organizations while also mitigating unknowable unknowns (specifically, creating safeguards that anticipate and mitigate risks with transformation, change, and adoption).	EXAMPLE The Customer Success professional should always plan for the worst and assume that, in the absence of proactive management of situations, the Customer will move towards the challenge and, eventually, churn, if left to their discernment. For example, silence and disengagement are signs of a deteriorating situation, not a “steady state.” Evidence of confronting silence and ensuring engagement, and not indifference, with precise action planning prevails.
SENIOR CSM **Senior Customer Success Manager**	DEFINITION Directs change leadership initiatives designed to provide clarity for other team members and stakeholders. Understands how undetermined or unknown factors might potentially impact work and operates proactively to mitigate those risks and ensure the underlying operating program successfully meets objectives, as evidenced in key data results.	EXAMPLE New technology or security compliance mandates, such as SHA-2, TLS 1.2, or similar, may have indeterminable impacts on both customers and the company alike. The Customer Success professional has led both internal and external groups by introducing and transforming change by ensuring a clear action plan, well-communicated impact mapping, and a consequential ongoing regime to ensure the transition that this requires is executed successfully.
MANAGER **Manager of Customer Success**	DEFINITION Has internalized active listening capability, ignoring all external or internal personal "challenges" with verbal or written communication styles, harnessing an ability to streamline and focus on the target issue, challenge or effort request.	EXAMPLE Cultivates a 'noise filtering' approach that expands the Program. Customer-facing challenges are archived and used as a case study example for weekly Program meetings. During weekly Program meetings, the individual will carve out time to discuss examples of encountering "noise" and how it was or was not overcome.

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STRATEGIC THINKING

Demonstrates Good Judgment.

CSM I **Customer Success Manager I**	DEFINITION Demonstrates an understanding of successful approaches to predictable and well-understood circumstances, including listing of courses of action to take, including solutions and success plays. Can select the appropriate and relevant application given the data and situation at hand. Leverages case studies, documented approaches, and shared knowledge to generate successful outcomes repeatedly.	EXAMPLE Customer escalations from the Support organization are routinely predictable and well-understood, even if the customer's sense of urgency is disproportionate to the (usually low-level) risk associated with the underlying issue. The Customer Success Manager can effectively de-escalate and deploy the right solution approach, directing other teams to complete repeatable and well-documented steps from prior cases, to ensure the customer is well served.
CSM II **Customer Success Manager II**	DEFINITION Customer Success Managers must demonstrate good judgment by selecting from a toolkit of potential tactics, initiatives, and solutions to make the right decision. Also evaluating rapidly changing strategic circumstances and, through careful evaluation and challenging underlying assumptions, to prioritize which information is relevant to a proper resolution.	EXAMPLE Often, a customer's problem that a customer faces is a known quantity and has a concrete solution; do not re-invent the wheel, but look at tried and true practices that have worked for customers elsewhere. For example, a customer that raises a concern about a potential security breach deserves an empathic but reasoned response that provides a standard evaluation and delivery of our determination of what occurred in response to their assertion of a breach, not a crisis response as a gut-reaction.
SENIOR CSM **Senior Customer Success Manager**	DEFINITION Track record of decision-making amidst incomplete or unclear information. Able to evaluate and prioritize the impact and relevance of information needed to make a decision. The confrontation of a customer or stakeholder's stated positions to unearth consolidated and actionable details. The Customer Success professional has a track record of using inadequate details to instinctively follow-through on a value-centric success-driven play.	EXAMPLE Sometimes, a customer will deliver unconsolidated and unactionable feedback, often making the underlying challenges or opportunities unclear. The Customer Success professional must confront incomplete or unclear circumstances with direct questioning to unearth root issues, and then decide on how best to address the unconsolidated and unactionable feedback based upon an instinctive reaction to the circumstances and context of the expressed positions' circumstances and context. These exercises are consistently successful.
MANAGER **Manager of Customer Success**	DEFINITION Embedded with a "trust your gut" mentality, pulling from previous Customer Success Manager experience currently and previously to verify proper decision-making skills self-led. The program is exposed to various avenues of "trusting your gut" with ongoing coaching to Customer Success Managers.	EXAMPLE Draws from archived examples of demonstrating sound judgment. Examples are broken down into categories that are labeled 'Team', 'Customers', 'Escalations' and 'Personal'. Guidelines are determined and this example or case study is deployed to the Program for reference.

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BUILDING EFFECTIVE RELATIONSHIPS

Conveys Information Clearly.

CSM I

Customer Success Manager I

DEFINITION

Demonstrates comprehension of the applicability of various communication methods, modalities, and tools that have been established by others. Has a consistent track record of selecting the proper communication method for the corresponding use case for to convey information clearly and engage the customer or stakeholder with the appropriate consequence, dependent on the corresponding use case.

EXAMPLE

Understands when to shift from email to phone conversations (e.g., a "three-round e-mail" rule for conveying information). Consistently recaps phone conversations with a written record (for both transcribing and validating and agreement from stakeholders). Makes use of in-person or virtual meetings for time-sensitive, high-urgent, or politically-charged conversations.

CSM II

Customer Success Manager II

DEFINITION

Communication is multi-channel and highly situational. Each stakeholder at an organization is motivated by different vested interests and desired outcomes, each of which must be managed and taken into account over time to forge a lasting partnership. Has a track record of consistently utilizing the appropriate media (email, phone, in-person, etc.) or systems to convey information.

EXAMPLE

Customers communicate across a spectrum. Some customer stakeholders are highly technical, whereas others are straightforward and simplistic in their understanding of technology. The Customer Success professional must comfortably communicate across the entire spectrum and reach stakeholders in their native expression, using the tools and modalities appropriate for the corporate culture in question.

SENIOR CSM

Senior Customer Success Manager

DEFINITION

Communication channels are multi-variate and cross-stakeholder, requiring carefully constructed synergy creation that the Customer Success professional architects build with the appropriate engagement vehicle. When engaging with customers, utilize the best tool for each individual participant to ensure that they are both deeply involved and transparently accountable for follow-up action. Will make use of engagement framework, models, pyramids, or similar to ascertain the participants' alignment and engagement.

EXAMPLE

Customers are community or engaged stakeholders who, based upon an individual's position in the ladder of engagement, have a threshold of willingness to take action and an appropriate communication mode or engagement mode. The Customer Success Professional will map stakeholders into their place in the pyramid. The Senior Customer Success Manager will deploy the proper form of communication - email recaps of an in-person meeting, a follow-up phone conversation to ensure engagement, etc. - to validate participation and build precise alignment on communication objectives to drive outcomes.

MANAGER

Manager of Customer Success

DEFINITION

Possesses the ability to qualify the communication style of the customer within the infancy of the relationship. Leverages playback and split-track strategies to concisely and completely understand the knowledge bases/level of the customer. The Program adopts and carries out the identify, strategize and implement methods for communication with customers.

EXAMPLE

Keeps clear and updated record of the touchpoint journey, follows and executes process within regularly used tools to accurately document communication. The Program is educated and familiarized with said practices and in the occurrence of new Customer Success Manager adopting customer- transition period would be minimal and nonexistent to the customer.

BUILDING EFFECTIVE RELATIONSHIPS

Builds Authentic Relationships.

CSM I

Customer Success Manager I

DEFINITION

Demonstrates the capability to receive and interpret corporate and professional relationship definitions and peering charts with minimal complexity; titles, roles, and responsibilities are aligned with the organization's stated objectives for engaging. Experience with authentic and empathic communication, nurtures from a human-centric value-driven perspective.

EXAMPLE

Taking possession of a new account requires a review of contacts; the Customer Success professional will identify key stakeholders by name and titles, and engage directly based upon a general understanding that these contacts are aligned with the value business case articulated in company systems.

CSM II

Customer Success Manager II

DEFINITION

Building authentic relationships is at the heart of Customer Success, and most relationships are complex and multivariate. Business owners and significant stakeholders will have demands that will need careful navigation and compromise to forge acceptance and, ultimately, alignment with an approach towards respective (sometimes conflicting) goals.

EXAMPLE

Customers have both business owners and end-users of different types (back and front of the restaurant), each with different needs and expectations of what technology means to the business. Use a “RACI” framework and, if large enough, an organizational peering chart, to understand roles and responsibilities at your client organization quickly and, ultimately, which role you should engage and how for the proper buy-in.

SENIOR CSM

Senior Customer Success Manager

DEFINITION

Relationships are complicated and multi-dimensional with a high degree of variability; mastery of authenticity in enterprise-grade relationships requires alignment of independent goals with organizational priorities to build a coalition for action around a central organizing plan. The Customer Success professional must develop and strengthen historical institutional relationships. Simultaneously, build an organizational peering model that determines how these, and changes in relationships and players, can deliver results for the business partnership.

EXAMPLE

Key strategic and enterprise accounts are involved with often-changing relationship dynamics based upon conflicting and shifting priorities of its key stakeholders; relationships will change and personalities will rapidly enter and exit the relationship requiring constant calibration. The Customer Success professional must build one-to-one relationships with stakeholders and redirect those relationships into meaningful action-centric coalitions among multiple competing and ever-changing players with different goals.

MANAGER

Manager of Customer Success

DEFINITION

Embodies absolute mastery of reciprocated value metrics by enabling partnership strengthening tools that drive continuous intention with authenticity. Customers are exposed to numerous programs that directly and indirectly focus on impactful effort, resulting in best-outcome scenarios for the Program and its customers.

EXAMPLE

Compile, standardize and deploy exercises to arm Customer Success Managers with a skill set to build and maintain reciprocated relationships with customers. A proactive strategy is taken to a new level of mindful/detail-oriented consistency. "Help Me, Help You" case study introspective is done regularly shared with program's customers.

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BUILDING EFFECTIVE RELATIONSHIPS

Inspires and Motivates Others.

CSM I

Customer Success Manager I

DEFINITION

Demonstrates an understanding of visionary guidance and its application to the company mission; the Customer Success professional can use best practices to deliver this vision to the appropriate audience and can execute competently and capably on the accurate delivery of this message.

EXAMPLE

New customers will often require a reiteration of the value proposition of their purchase. The Customer Success professional can capably identify the audience member and deliver the company's value through a general overview and map this value directly to the customer's organizational mission, ensuring to address essential business needs as a part of the alignment exercise.

CSM II

Customer Success Manager II

DEFINITION

Inspirational vision often originates with the Customer Success professional. It requires integration with the company or the customer's mode of thinking to build support; key influencers and stakeholders must be a part of a comprehensive campaign to set and manage expectations and buy-in for the Customer Success value proposition.

EXAMPLE

Audiences that Customer Success professionals engage are mixed; sometimes, a chef is both back-office and front-office; other times, a restaurant manager is only operational. Inspiring and motivating customers requires a strong value definition of why Customer Success is valuable, and then making sure it is delivered in a way that ensures the recipient embraces that message as their own.

SENIOR CSM

Senior Customer Success Manager

DEFINITION

Visionary leadership requires constant redefinition and articulation within the business relationship framework, which is then reinforced through the practice of executing an operating plan. The Customer Success professional can recruit influencers and key stakeholders to be champions and stewards of a situational vision that maps back to the original value proposition, and then equips them with the tools necessary to evangelize and execute against the mission on both sides of the relationship.

EXAMPLE

Business Reviews are critical activities with clients that reinforce the fundamental relationship is aligned with the original vision but calibrated for changing business circumstances that arise from the operating partnership. The Customer Success professional must competently organize and lead multi-stakeholder business reviews past challenges of value acceptance and seize roadmap alignment opportunities. The rest of the customer organization leverages the partnership for their ongoing business needs.

MANAGER

Manager of Customer Success

DEFINITION

Internal (program/team) and external (customer-facing) focus on positive, strength building instances that are harnessed and repeated for improvement/hurdle opportunities. The individual leads by example focusing on COE (center of excellence) capabilities of the Program and customer's COE capabilites.

EXAMPLE

Has standardized a P.P.C. model (peak, pit, commit) for the Program. During recurring internal meetings, program contributors will share a peak and pit moment of their week and commit to one small goal to keep uphill momentum at the forefront of their minds for sustainable and repeatable performance. The manager and the Program will administer this with a select group of customers for adoption/project proficiency.

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BUILDING EFFECTIVE RELATIONSHIPS

Resolves Conflict through Empathy.

CSM I

Customer Success Manager I

DEFINITION

Demonstrates an understanding of personality dynamics or working styles and how they contribute to different work approaches. The Customer Success professional can engage stakeholders and audiences with an inclusive and mature mindset, focusing on clear and consistent communication to resolve any misunderstandings and ensure issues do not threaten success.

EXAMPLE

Some customers will routinely miss scheduled meetings or fail to participate in properly-calendared conferences. It will fall to the Customer Success professional to reach out to the customer and ensure that the sessions are the right vehicle to provide, through a focus on openness and understanding, the needs of the relationship if there are underlying issues that take higher priority. The Customer Success Manager should address those issues should be addressed before resuming business-as-usual.

CSM II

Customer Success Manager II

DEFINITION

Conflicts are a natural part of the business relationship that spans both the business value's perception and the operational execution to achieve that value. The Customer Success Professional must confront this conflict through honest and empathic conversations that build alignment and negotiate an operating agreement towards successful outcomes.

EXAMPLE

Customers who routinely obstruct progress in the relationship by expressing challenge to the product's value but yet are unwilling to participate in adoption, insights, or results-oriented exercises, will require an intervention. The Customer Success professional capably engages the customer in an open, transparent, and empathic conversation exploring similarities, confronting differences, and achieving agreement on desired outcomes to build a plan of action to resolve underlying challenges.

SENIOR CSM

Senior Customer Success Manager

DEFINITION

Strategic relationships often will have high-performing and ambitious personalities with healthy perspectives that clash with the Customer Success program's underlying vision. The Customer Success professional must confront difficult issues by managing change at every opportunity: recognizing the value that philosophical perspectives on the business challenges afford the partnership, while nurturing shared perspectives and the relationship at its core to pursue success opportunities.

EXAMPLE

Operational change is a typical flashpoint for enterprise customers who are unwilling to accept change from their own perceived or philosophical understandings of reality; the Customer Success Manager must reinforce the current facts about the operating partnership (such as whether or not a piece of technology is currently a supported solution) and deliver change management through a realignment of operating priorities that minimize conflict and maximize business results.

MANAGER

Manager of Customer Success

DEFINITION

Ability to appropriately understand, diagnose and triage a complex instance of conflict. The Customer Success Manager can swiftly address and manage challenging issues with strategic customers and carry out to the Program that successfully, in a repeated fashion, facilitates management strategy for Program customers.

EXAMPLE

The Customer Success Manager has a list of protocol items for resistant or rebellious customers. These protocol items encompass highly strategic verbal/written techniques for de-escalation strategies that will progress the customer through a TSP (transformation success play). TSP's will be carried out by the CSM as well as Program CSMs.

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Interview Questions.

Evaluating individuals against the Customer Success Competency Model can be achieved either through a comprehensive performance assessment process suitable for existing employees and/or through a candidate interview process that maps their Employee Personality Profile (EPP) against the performance predictability indicators of corresponding competency areas. Suggested interview questions to assess success factors in executive leadership follow.

The Employee Personality Profile (EPP) is Criteria's assessment. A scale score does not decide a hire; it tells the interviewer where to press. Each competency below names its scale, describes effectiveness at low and high complexity, and lists the questions that surface it.

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BUILDING EFFECTIVE RELATIONSHIPS

Conveys Information Clearly.

Conveys relevant information clearly, choosing appropriate tools and media based on the audience and situation.

LOW COMPLEXITY

In low complexity roles, most of the communication methods and tools have been established by others. Proficiency means selecting the appropriate communication method and/or tool given the information.

HIGH COMPLEXITY

In high complexity roles, the individual must develop appropriate tools, resources, and communication habits. Proficiency means developing effective tools and methods of communication that result in stakeholder enablement and action.

EPP scale
Assertiveness
AST

This competency area maps to the Assertiveness (AST) scale score on the EPP, which provides a gauge of an individual's directness in expressing himself or herself and in dealing with others.

1. Give me an example of a time when you were able to successfully communicate with another person, even when that individual may not have personally liked you, or vice versa.
2. Tell us about a time when you had to present complex information. How did you ensure that the other person understood?
3. Have you had to "sell" an idea to your co-workers, classmates, or group? How did you do it? Did they "buy" it?
4. Tell us about a time when you and your current/previous supervisor disagreed but you still found a way to get your point across.
5. Tell me about a situation when you had to speak up (be assertive) in order to get a point across that was important to you.
6. Describe a situation in which you were able to effectively "read" another person and guide your actions by your understanding of their individual needs or values.

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BUILDING EFFECTIVE RELATIONSHIPS

Builds Authentic Relationships.

Practices active listening to create authentic relationships built upon trust.

LOW COMPLEXITY

In low complexity roles, the relationships are defined in advance and the partners share aligned goals and objectives. Proficiency means engaging with authenticity and empathy, and nurturing natural relationships.

HIGH COMPLEXITY

In high complexity roles, relationships must be formed with partners that have independent needs and goals. Proficiency means maximizing those relationships, such that both parties aid one another in their respective goals.

EPP scale
Extroversion
EXT

This competency area maps to the Extroversion (EXT) scale score on the EPP, which indicates the degree of self-perceived socialness. High extroversion is not necessarily an indicator of success, however, it can be a successful way to building relationships which yield results.

1. When is listening important on your job? When is listening difficult?
2. It is important to maintain a positive attitude at work when you have other things on your mind. Give a specific example of when you were able to do that.
3. Tell us about a time when you made an intentional effort to get to know someone from another culture.
4. Tell us about a time when you had to adapt to a wide variety of people by accepting/understanding their perspective.
5. Have you ever had difficulty getting others to accept your ideas? What was your approach? Did it work?
6. Describe a situation when you were able to have a positive influence on the actions of others.

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BUILDING EFFECTIVE RELATIONSHIPS

Inspires and Motivates Others.

Communications a vision that inspires and motivates others, adapting the messaging according to the audience and venue.

LOW COMPLEXITY

In low complexity roles, the vision has been created and tailored and delivery guidance has likely been provided based on audience. Proficiency means choosing the guidance that best matches the audience, and accurately delivering that message.

HIGH COMPLEXITY

In high complexity roles, the vision must first be defined and then systematically ingrained into the culture and norms. Proficiency means motivating key influencers so that they can share and reinforce the message with others.

EPP scale
Managerial
MGT

This competency area maps to the Managerial (MGT) scale score on the EPP, which measures how a person's work strengths combine with their ability to lead others. This is essential for both people-managers as well as those influencing the actions of others (e.g., Sales).

1. Have you ever had to persuade a group to accept a proposal or idea? How did you go about doing it? What was the result?
2. Describe your leadership style and give an example of a situation when you successfully led a group.
3. Give an example of how you have been successful at empowering a group of people in accomplishing a task.
4. Give an example of how you worked effectively with people to accomplish an important result.
5. Have you ever been a project leader? Give examples of problems you experienced and how you reacted.
6. Have you ever been in a position where you had to lead a group of peers? How did you handle it?

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BUILDING EFFECTIVE RELATIONSHIPS

Resolves Conflict through Empathy.

Acknowledges and incorporates the perspectives of others into conflict resolution.

LOW COMPLEXITY

In low complexity roles, conflict may be the result of interpersonal differences or a differing approach to a task. Proficiency means approaching those situations with maturity, using behaviors of inclusion and positive communication techniques to resolve the situation.

HIGH COMPLEXITY

In high complexity roles, the conflict may be philosophical in nature and resolution may require true empathy and humility. Proficiency means recognizing the merits of opposing viewpoints. It also means reducing conflict by proactively nurturing the relationships to better align viewpoints.

EPP scale
Cooperativeness
COP

This competency area maps to the Cooperativeness (COP) score on the EPP, which measures comfort working closely with others and taking the lead from others. A low COP score may indicate independence or aggressiveness in dealing with others.

1. Have you ever participated in a task group? What was your role? How did you contribute?
2. Please give your best example of working cooperatively as a team member to accomplish an important goal. What was the goal or objective? To what extent did you interact with others on this project?
3. Some people work best as part of a group; others prefer the role of an individual contributor. How would you describe yourself? Give an example of a situation where you felt you were most effective.
4. Tell us about the most difficult challenge you faced in trying to work cooperatively with someone who did not share the same ideas. What was your role in achieving the work objective?
5. What is the difficult part of being a member, not leader, of a team? How did you handle this?
6. When is the last time you had a disagreement with a peer? How did you resolve the situation?

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BIAS FOR ACTION

Organizes Work using Processes.

Utilizes organizational systems and processes to get work done with efficiency.

LOW COMPLEXITY

In low situational complexity roles, processes and best practices are well established. There is sufficient support on their effective use. Proficiency means managing individual work effectively, delivering against known goals and deadlines.

HIGH COMPLEXITY

In high situational complexity roles, new systems, routines, and practices must be developed and implemented within the organization. Proficiency means using data to ensure the developed systems and processes are impacting our goals.

EPP scale
Conscientiousness
CON

This competency maps to the Conscientiousness (CON) scale on the EPP, which describes a person's tendencies to be deliberate, self-disciplined, organized, and dependable.

1. How do you decide what gets top priority when scheduling your time? What do you do when your schedule is suddenly interrupted?
2. Discuss an important decision you have made regarding a task or project at work. What factors influenced your decision? Wha tare some of the major decisions you have made over the past (6, 12, 18) months?
3. Tell us about a time when you had to analyze information and make a recommendation. What kind of thought process did you go through? What was your reasoning behind your decision?
4. Tell us about a time when a job had to be completed and you were able to focus your attention and efforts to get it done.
5. Do you prefer with the "big picture" or the "details" of a situation? Give me an example of an experience that illustrates your preference. Tell us about a situation where attention to detail was either important or unimportant in accomplishing an assigned task.

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BIAS FOR ACTION

Manages Resources Effectively.

Accurately scopes the work at hand and secures the time and resources needed.

LOW COMPLEXITY

In low complexity roles, there are known and predictable models of success in terms of capacity required and resources needed. Proficiency means matching the situation at hand with the appropriate playbook in order to meet goals and solve problems.

HIGH COMPLEXITY

In high complexity roles, the individual holds responsibility for determining the budget and advocating for the resources needed. Proficiency means using data and evidence to develop a budget and resource plan, as well as adjusting that plan

EPP scale
Managerial
MGT

This competency area maps to the Managerial (MGT) scale score on the EPP, which measures how a person's work strength scombine with their ability to lead others. This is essential for both people-managers, as well as those influencing the actions of others (e.g., Sales).

1. Describe how you develop a project team's goals and project plan? How do you schedule your time? Set priorities? How do you handle doing twenty things at once?
2. Tell us about a time when you were particularly effective on prioritizing tasks and completing a project on schedule. Or, when you organized or planned an event that was very successful.
3. Have you ever been a project leader? Give examples of problems you experienced and how you reacted.
4. Of your current assignments, which do you consider to have required the greatest amount of effort with regard to planning/organization? How have you accomplished this assignment? How would you assess your effectiveness?
5. Give an example of how you have been successful at empowering either a person or a group of people into accomplishing a task.
6. How do you handle a coworker, team member, or direct report whose work is not up to expectations?

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BIAS FOR ACTION

Aligns Priorities and Efforts to Goals.

Understands how work is aligned to overarching priorities and goals, prioritizing efforts accordingly.

LOW COMPLEXITY

In low complexity roles, goals are defined and communicated by others, and with limited autonomy in terms of priorities. Proficiency means correctly identifying the cause of a problem or situation, and applying the appropriate solution.

HIGH COMPLEXITY

In high complexity roles, the organization has a high degree of dependency on the department's ability to achieve its goals. Proficiency means thinking critically how all individuals contribute to broader goals, and maintaining focus on those priorities.

EPP scale

Achievement

ACH

This competency area maps to the Achievement (ACH) score on the EPP, and the ability to follow through and complete tasks, achieve specific goals, and interest in intellectual/conceptual work.

1. Give an example of an important goal that you set in the past. Tell about your success in reaching it.
2. Tell us about a time when you had to go above and beyond the call of duty in order to get a job done.
3. What projects have you started on your own recently? What prompted you to get started?
4. When you have a lot of work to do, how do you get it all done? Give an example.
5. Describe a situation when you demonstrated initiative and took action without waiting for direction. What was the outcome?
6. Describe how you develop a project team's goals and project plan.

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BIAS FOR ACTION

Gains Consensus on Outcomes.

Gains consensus to achieve mutually beneficial outcomes by leveraging partnerships.

LOW COMPLEXITY

In low complexity roles, the outcome is typically mutually beneficial and therefore requires limited consensus building. Proficiency means leading a discussion between partners about how each will contribute to the outcome.

HIGH COMPLEXITY

In high complexity roles, consensus is not required and decisions made may not be equitably beneficial to all parties involved. Proficiency means maintaining coalitions of support for the outcomes, despite competing needs or dissenting views felt by partners.

EPP scale
Assertiveness
AST

This competency area maps to the Assertiveness (AST) scale score on the EPP, which provides a gauge of an individual's directness in expressing himself or herself and in dealing with others.

1. Describe the most challenging negotiation in which you were involved. What did you do? What were the results for you? What were the results for others?
2. Have you ever been in a situation where you had to bargain with someone? How did you feel about this? How did you prepare for it? How did you present your position? How did you resolve it?
3. Tell us about the last time you had to negotiate with someone. What was the most difficult part?
4. Give a specific example of a time when you had to address an angry customer. What was the problem and what was the outcome? How would you assess your role in diffusing the situation?
5. It is very important to build good relationships at work but sometimes it doesn't always work. If you can, tell about a time when you were not able to build a successful relationship with a difficult person.

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STRATEGIC THINKING

Strives for Continuous Improvement.

Self-driven focus on continuous learning and development; upholds accountability for achieving intended outcomes.

LOW COMPLEXITY

In low complexity roles, performance improvement is typically limited to one's own development. Actions to improve are clear. Proficiency means learning from past actions and outcomes to consistently improve in work quality.

HIGH COMPLEXITY

In high complexity roles, standard metrics for measuring success must be developed. Improvement may involve systemic changes. Proficiency means identifying actions to drive improvement while also maintaining accountability for achieving the outcomes.

EPP scale
Competitiveness
CMP

This competency area maps to the Competitiveness (CMP) scale score on the EPP, which reflects the need to win, to perform better than others, or to surpass standards of achievement or performance.

1. Describe a time when you made a suggestion to improve the work in your organization.
2. Describe how your position contributes to your organization's goals. What are the goals or mission?
3. Tell us about a suggestion you made to improve the way job processes or operations worked. What was the result?
4. There are many jobs in which well-established methods are typically followed. Give a specific example of a time when you tried some other method to do the job.

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STRATEGIC THINKING

Creative and Rigorous Problem Solving.

Uses rigorous logic to define problems, generate effective solutions, and anticipate hidden challenges.

LOW COMPLEXITY

In low complexity roles, the problems are well defined, with clear data used to identify the solution. Solutions tend to follow a routine cause-effect relationship. Proficiency means quickly defining the problem and applying the most effective solution, not simply the most obvious one.

HIGH COMPLEXITY

In high complexity roles, both the cause and the solution remain unknown and problem solving involves monitoring both leading indicators and lagging outcomes. Proficiency means using a disciplined and data driven approach to defining the problem, and testing sustainable solutions.

EPP scale

Conscientiousness and Openness

CON

This competency area maps to the Conscientiousness (CON) and Openness score scale on the EPP, which provides an indication of a person's tendency to be deliberate, disciplined, organized, and dependable as well as the extent to which an individual is imaginative and creative, as opposed to down to earth and conventional.

1. Tell us about a time when you had to analyze information and make a recommendation. What kind of thought process did you go through? What was your reasoning behind your decision?
2. How did you go about deciding what strategy to employ when dealing with a difficult customer?
3. Have you ever had a situation where you had a number of alternatives to choose from? How did you go about choosing one?
4. What innovative procedures have you developed? How did you develop them? Who was involved? Where did the ideas come from?
5. There is more than one way to solve a problem. Give an example from your recent work experience that would illustrate this.

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STRATEGIC THINKING

Comfort with Complexity and Ambiguity.

Navigates complexity and ambiguity comfortably. Demonstrates curiosity and openness when faced with unknown situations.

LOW COMPLEXITY

In low complexity roles, ambiguity experienced is typically organizational, with limited uncertainty about the tasks at hand. Proficiency means filtering for ambiguity that impacts the goals at hand, as opposed to being reactive to atmospheric complexity.

HIGH COMPLEXITY

In high complexity roles, responsibilities include leading through change and providing clarity for others despite ambiguity. Proficiency means understanding how undetermined factors might impact the work, and mitigating those risks as possible.

EPP scale

Stress Tolerance and Patience

This competency area maps to the Stress Tolerance and Patience scale score on the EPP, which measures the way people respond to stress, their ability to be calm/composed, even under stressful conditions – as well as a person's ability to effectively cope with frustration encountered in completing tasks in a conflict-laden situation.

1. Tell us about a situation in which you had to adjust to changes over which you had no control. How did you handle it?
2. Have you ever worked in a situation where the rules and guidelines were not clear? Tell me about it. How did you feel about it? How did you react?
3. Have you ever been caught unaware by a problem or obstacles that you had not foreseen? What happened?
4. Sometimes we need to remain calm on the outside when we are really upset on the inside. Give an example of a time that this happened to you.
5. Have you ever dealt with a situation where communications were poor? Where there was a lack of cooperation? Lack of trust? How did you handle these situations?

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STRATEGIC THINKING

Demonstrates Good Judgment.

Selects appropriate data for analysis and uses rigor and intellectual horsepower to drive decision quality.

LOW COMPLEXITY
In low complexity roles, decisions are low-risk and typically follow a predictable pattern with models of past success. Proficiency means using good judgment to select the appropriate course of action given the situation at hand and data available.

HIGH COMPLEXITY
In high complexity roles, decisions must be made with the available information – which is often incomplete or unclear. Proficiency means rigorously questioning assumptions and understanding which information is best used to make a decision.

EPP scale
Conscientiousness
CON

This competency area maps to the Conscientiousness (CON) scale score on the EPP, which provides an indication of a person's tendency to be deliberate, disciplined, organized, and dependable.

1. Give me a specific example of a time when you used good judgment and logic in solving a problem.
2. Give me an example of when you took a risk to achieve a goal. What was the outcome?
3. Everyone has made some poor decisions or has done something that just did not turn out right. Has this happened to you? What happened?
4. In a current job task, what steps do you go through to ensure your decisions are correct and effective?
5. Sometimes it is essential that we break out of the routine, standardized way of doing things in order to accomplish the task. Give an example of when you were able to successfully develop such a new approach.

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IV

Exhibits.

Three job descriptions built from the model: a Customer Success Manager at moderate complexity, a Manager of Customer Success at high, and a Customer Success Operations Manager — high in two disciplines, low in the third, because the role faces inward. The competencies and proficiencies at the end of each are lifted straight from the matrix — which is the point. A job description should be the model, applied.

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EXHIBIT A

Customer Success Manager.

ORGANIZATION	Customer Success	DEPARTMENT	Success Management
MANAGER	Manager, Customer Success	DIRECT REPORTS	N/A
CLASSIFICATION	Exempt: Professionals: Business Operations Specialists (13-1199) Exempt: Administrative: Customer Service Representatives (43-4051)		

Customer Success Managers are responsible for an incredible customer experience, delivering joy and delight to our client community of professionals. As a part of the Company's "customer obsessed" mission, Customer Success Managers build thriving client partnerships, aligning customer business goals to an accelerated approach that maximizes value realization from company solutions. The Customer Success discipline ensures high customer satisfaction levels, successful engagement with our platform and products, increased retention and driven growth, and consistently strong actualization of value from solutions by developing and executing proactive success plans.

Essential Duties and Responsibilities

- Create and execute Customer Success plans to establish strong trust-based client relationships, driving adoption and business value from solutions and our partnerships.
- Establish proactive, value-driven, high-touch relationships with customers to understand, document, and align client strategies and business objectives with the Company's product portfolio and service capabilities.
- Deliver a proactive engagement and communication strategy that focuses on meeting customer outcomes, creating client advocates that evangelize the Company and drive new opportunities.
- Engage consistently with customers throughout the client lifecycle to ensure alignment on actual vs. expected performance, value realization, and business goals, to drive solution and partnership impact.
- Manage programs and optimize processes in the Company Customer Journey, utilizing success markers to maintain the proper balance between technology and touch to maximize customer health.
- Define and monitor key performance indicators on a portfolio of clients and execute actions to ensure these targets are consistently met and jointly scored between the Company and our customers.
- Educate customers on the Company's solution landscape, relevant to their business practices, while also conducting workshops to build stakeholder alignment on joint roadmap for products and services.
- Work collaboratively across the Company's organization to amplify the impact of client feedback, ensuring customer questions, comments, and concerns lead to consolidated, actionable plans that deliver results.
- Partner extensively with the internal stakeholders to support account teams in conducting business reviews and structured engagements that deliver valuable business insights and roadmap alignment.
- Design, develop, and deliver customer success engagements and campaigns that mitigate risk, reduce churn, drive referrals, and maximize growth on the account, deployed internally and externally.
- Manage the customer experience, orchestrating and collaborating with the internal teams and resources to ensure and document clients' progress, achieve their goals, and execute cohesively.
- Direct a cross-functional approach that supports the customer onboarding framework by identifying and executing actions that drive client business value realization against purchased solution scopes.
- Advocate for customers by channeling the "Voice of the Customer" to drive best practices, aligning their business roadmap with our platforms and solutions, and engaging them as a community.
- Execute on or participate in the Company's Customer Success Organization alignment and evolution of programs to accommodate changes in business requirements, partner or vendor agreements, and other needs as they arise.
- Evaluate and generate internal buy-in to the Customer Success philosophy and ensure it permeates all organizations, departments, programs, and initiatives across the company.
- Foster a Customer Success culture by sharing customer insights, wins, and growth opportunities that inform sales, engineering, marketing, and service improvement.
- Maintain industry and technical knowledge by attending workshops and reviewing relevant publications, establishing networks and participating in professional organizations.

Key Performance Indicators

1. Gross Revenue Retention (GRR) for individual assigned account portfolio.
2. Net Revenue Retention (NRR) inclusive of expansions and growth of client relationships.
3. Customer Health inclusive of client satisfaction measures including Net Promoter Score (NPS) and Customer Satisfaction (CSAT).

Skills and Experience

- Bachelor's Degree in a relevant field, such as business management, industry, or program management. Master's Degree or other advanced degree preferred. Six Sigma Green Belt or higher a plus.
- 5+ years of progressive experience in customer success, account management, customer operations, client services, or program management in a client-facing capacity, with direct accountability for retention and expansion of the customer account relationship.
- Prior experience with managed services, change management, or business transformation a plus.
- Exceptionally strong consultative, presentation, and relationship skills are essential.
- Experience working with Executive and C-Level Teams.
- Ability to understand and document customer requirements, map to product, track and report metrics, identify upsell and cross-sell opportunities.
- Related industry certifications a plus.
- Experience with a CRM, a service desk, or a customer success platform a plus.
- Proven history of identifying and executing actions to drive high levels of customer retention and growth.
- Strong ability to manage process execution across the Industry stakeholder, partner, and vendor ecosystems; experience with specific vendor systems such as Vendor a plus.
- Proven ability to facilitate and work across internal teams (Engineering, Product, Operations, Sales, Finance, etc.) to obtain knowledge and necessary information in accelerating delivery efforts.
- Fluency with industry, professional, managed services, and business operations.
- Excellent written and verbal communication skills, with the ability to convey highly technical information in an easy-to-understand manner.
- Excellent organizational skills and experience managing competing priorities.

Competencies & Proficiencies

MOD Building Effective Relationships

- Adapting effective communication methods and tools given the audience and information.
- Maximizing defined relationships such that the mutually aligned goals and objectives are achieved.
- Motivating aligned stakeholders by communicating a vision that is adapted to their context and needs.
- Reducing potential conflict by proactively nurturing relationships with aligned individuals.

MOD Bias for Action

- Managing project and program work effectively, delivering against known goals and deadlines.
- Contextualizing a known playbook given unexpected circumstances to meet goals and solve problems.
- Uses autonomy to correctly identify the cause of a problem or situation and apply the appropriate solution.
- Maintaining coalitions of support for necessary action, despite competing priorities.

MOD Disciplined and Strategic Thinking

- Learning from past actions and outcomes to consistently improve in work quality.
- Quickly defining the problem and applying the most effective solution – not merely the most obvious one.
- Filtering for ambiguity that impacts the goals at hand, instead of being reactive to atmospheric complexity.
- Using sound judgment to select the appropriate course of action given the situation at hand and data available.

EXHIBIT B

Manager, Customer Success.

ORGANIZATION	Customer Success
MANAGER	Director, Customer Success
CLASSIFICATION	Exempt: Professionals: Business Operations Specialists (13-1199) Exempt: Administrative: Customer Service Representatives (43-4051)
DEPARTMENT	Success Management
DIRECT REPORTS	Customer Success Manager Senior Customer Success Manager

Customer Success Managers are responsible for an incredible customer experience, delivering joy and delight to our client community of professionals. As a part of the Company's "customer obsessed" mission, Customer Success Managers build thriving client partnerships, aligning customer business goals to an accelerated approach that maximizes value realization from company solutions. The Customer Success discipline ensures high customer satisfaction levels, successful engagement with our platform and products, increased retention and driven growth, and consistently strong actualization of value from solutions by developing and executing proactive success plans. Reporting to the Director, Customer Success, the Manager, Customer Success leads one or more Customer Success Manager teams, supervising and mentoring them to become trusted advisors and high performing business executives.

Essential Duties and Responsibilities

- Develop and mentor a team of passionate and motivated customer success managers, building a high performance culture and business value-focused results, grounded in trust-centered client relationships.
- Define and forecast key performance indicators for account segments within your team's portfolio, including retained revenue and net growth.
- Report on customer engagement and value actualization, utilizing the appropriate tools and technologies.
- Manage programs and optimize processes in the Company Customer Journey, utilizing success markers to maintain the proper balance between technology and touch to maximize customer health for your team.
- Design processes and systems that enable customer success managers to design and develop solutions, delivering on retention and driving growth, for customers using the Company's platform and service offerings.
- Educate customers on the Company's solution landscape, relevant to their business practices, while also conducting workshops to build stakeholder alignment on joint roadmap for products and services.
- Work collaboratively across the Company to amplify the impact of client feedback, ensuring customer questions, comments, and concerns lead to consolidated, actionable plans that deliver results.
- Partner extensively with the internal stakeholders to support account teams in conducting business reviews and structured engagements that deliver valuable business insights and roadmap alignment.
- Design, develop, and deliver customer success engagements and campaigns that mitigate risk, reduce churn, drive referrals, and maximize growth on the account, deployed internally and externally.
- Manage the customer experience, orchestrating and collaborating with the internal teams and resources to ensure and document client progress towards achieving their goals; execute this experience cohesively.
- Direct a cross-functional approach that supports the customer onboarding framework by identifying and executing actions that drive client business value realization against purchased solution scopes.
- Advocate for customers by channeling the 'Voice of the Customer' to drive best practices, aligning their business roadmap with our platforms and solutions, and engaging them as a community.
- Execute on or participate in the Company's Customer Success organization's alignment or evolution of programs to accommodate changes in business requirements, partner or vendor agreements, and other needs as they arise.
- Evaluate and generate internal buy-in to the Customer Success philosophy and ensure it permeates all organizations, departments, programs, and initiatives across the company.
- Foster a Customer Success culture by sharing customer insights, wins, and growth opportunities that inform sales, engineering, marketing, and service improvement.
- Maintain industry and technical knowledge by attending workshops and reviewing relevant publications, establishing networks and participating in professional organizations.

EXHIBIT B · CONTINUED

Key Performance Indicators

1. Gross Revenue Retention (GRR) for individual assigned account portfolio.
2. Net Revenue Retention (NRR) inclusive of expansion and growth of client relationships.
3. Customer Health inclusive of client satisfaction measures including Net Promoter Score (NPS) and Customer Satisfaction (CSAT).

Skills and Experience

- Bachelor's Degree in a relevant field, such as business management, industry, or program management. Master's Degree or other advanced degree preferred. Six Sigma Green Belt or higher a plus.
- 7 to 10+ years of progressive experience in customer success, account management, customer operations, client services, or program management in a client-facing capacity with direct accountability for retention and expansion of the customer account relationship.
- 3 to 5+ years of people management experience.
- Prior experience with managed services, change management, or business transformation a plus.
- Exceptionally strong consultative, presentation, and relationship skills are essential.
- Experience working with Executive and C-Level Teams.
- Ability to understand and document customer requirements, map to product, track and report metrics, identify upsell and cross-sell opportunities.
- Related industry certifications a plus.
- Experience with a CRM, a service desk, or a customer success platform a plus.
- Proven history of identifying and executing actions to drive high levels of customer retention and growth.
- Strong ability to manage process execution across the Industry stakeholder, partner, and vendor ecosystems; experience with specific vendor systems such as Vendor a plus.
- Proven ability to facilitate and work across internal teams (Engineering, Product, Operations, Sales, Finance, etc.) to obtain knowledge and necessary information in accelerating delivery efforts.
- Fluency with industry, professional, managed services, and business operations.
- Excellent written and verbal communication skills, with the ability to convey highly technical information in an easy-to-understand manner.
- Excellent organizational skills and experience managing competing priorities.

Competencies & Proficiencies

HIGH Building Effective Relationships

- Developing effective communication methods and tools that result in stakeholder enablement or action.
- Maximizing relationships with partners, such that both parties aid one another in their respective goals.
- Motivating key influencers so that they can share and reinforce the message with others.
- Recognizing the opposing viewpoints' merits; reducing conflict by proactive nurturing the relationships to align perspectives better.

HIGH Bias for Action

- Using data to ensure the developed systems and processes are impacting our goals.
- Using data as evidence to establish a budget and resource plan, as well as adjusting the plan over time.
- Thinking critically about how all individuals contribute to broader goals, and maintaining focus on those priorities.
- Maintaining coalitions of support for the outcomes, despite competing needs or dissenting views felt by partners.

HIGH Disciplined and Strategic Thinking

- Identifying actions to drive improvement while aleo maintaining accountability for achieving outcomes.
- Using a disciplined and data-driven approach to defining the problem and testing sustainable solutions.
- Understanding how undetermined factors might impact work and mitigating those risks as possible.
- Rigorously questioning assumptions and understanding which information is best used to make a decision.

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EXHIBIT C

Customer Success Operations Manager.

ORGANIZATION	Customer Success	DEPARTMENT	Success Operations
MANAGER	Director, Customer Success	DIRECT REPORTS	N/A
CLASSIFICATION	Exempt: Professionals: Business Operations Specialists (13-1199) Exempt: Administrative: Customer Service Representatives (43-4051)		

The Customer Success Operations Manager's mission is to drive the effectiveness and efficiency of our Customer Success Organization. You will report into the Director, Customer Success and will be their trusted partner in defining customer success objectives, strategy, and tactics, and in implementing processes that scale. You will own identifying, evaluating, analyzing, and implementing operational solutions, including success playbooks, to deliver exceptional value to our customers.

Essential Duties and Responsibilities

- Report to stakeholders, including executives and teams, on past results of success engagements, including but not limited to renewals and upsells through dashboards and presentations.
- Analyze performance of the Customer Success program, including tracking leading indicators of renewals and upsell, and evaluate them to understand what is going well and what needs improvement.
- Deliver the Customer Lifecycle by determining the timing and content of touch points for Customer Success Managers along the customer journey to drive adoption, success measures, and results.
- Devise external communications by coordinating across the Customer Success team to synchronize digital tech touch engagements with Customer Success Manager touchpoints.
- Mitigate and manage risks by detecting early signals of at-risk renewals, designing playbooks for Customer Success Managers to address them, and provide escalation and remediation pathways.
- Develop opportunities by identifying key acceptance criteria and corresponding top client candidates for upsell or cross-sell in driving growth and expansion of accounts across Success Management.
- Coordinate cross-functional processes that help meet renewal and upsell targets and deliver on customers' needs, including processes for Customer Success Managers to facilitate company-wide plays.
- Manage resources and people across the Customer Success Organization by tiering existing customers, assigning them to Success Managers, re-distribute workload as needed, and forecast hiring needs.
- Determine the metrics upon which compensation, including bonuses, are based and define targets, tracking, and reporting methodologies for those metrics.
- Provide enablement support through materials and data that help Customer Success Managers work more effectively, including but not limited to customer health scores, alerts, and early warning systems.
- Utilize technology to deliver client engagement and communication processes in scalable and automated ways that drive strong relationships and ensure client business outcomes are being consistently met.
- Manage the configuration of the company's Success Management systems — the success platform, the CRM, and the service desk — to ensure business, client, and engagement data are fully integrated and automated.
- Design and deploy scalable processes and rules to ensure data hygiene, process compliance, policy frameworks, and program management procedures are well-documented and consistently optimized.
- Create and execute automated Customer Success plans to establish strong trust-based client relationships anchored in business value from purchased solutions and measured through outcomes.
- Support the broader Customer Success Organization teams to ensure client needs are being properly addressed and strong customer delight is actualized through a cohesive engagement experience.
- Drive scalable automation and efficiency across the Customer Success Organization by working cross-functionally and trans-organizationally to implement solutions across processes, systems, and data.

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Key Performance Indicators

1. Success Playbook Utilization and Actualization Rates.
2. Resource Management Capacity Model Utilization and Actualization Rates.
3. Internal Customer Feedback measures, including Customer Satisfaction (CSAT).

Skills and Experience

- Bachelor's Degree in relevant field, such as Information Technology, Management Information Systems, or Operations. Six Sigma Green Belt or higher a plus.
- 5+ years of experience in leading or supporting virtual Customer Success or Account Management roles, preferably with subscription or software offers, with direct accountability for renewals and expansions.
- Prior experience deploying and managing a customer success platform, and leveraging it to execute a "one-to-many" automated tech-touch engagement model.
- Exceptionally strong consultative, presentation, and relationship skills are essential.
- Experience working with Executive and C-Level Teams.
- Ability to understand and document customer requirements, map to product, track and report metrics, identify upsell and cross-sell opportunities.
- Proven history of identifying and executing actions to drive high levels of customer retention and growth.
- Prior experience with data modeling and predictive analytics.
- Strong ability to manage process execution across the Information Technology stakeholder, partner, and vendor ecosystems.
- Proven ability to facilitate and work across internal teams (Engineering, Product Operations, Sales, Finance, etc.) to obtain knowledge and necessary information in accelerating delivery efforts.
- Fluency with software and services business operations.
- Excellent written and verbal communication skills, with the ability to convey highly technical information in an easy-to-understand manner.
- Excellent organizational skills and experience managing competing priorities.
- Results-driven and execution-oriented personality.

Competencies & Proficiencies

LOW Building Effective Relationships

- Selecting the appropriate communication method and/or tool given the information.
- Engaging with authenticity and empathy, and nurturing natural relationships.
- Choosing the guidance that best matches the audience, accurately delivering that message.
- Approaching situations with maturity using behaviors of inclusion and positive communication techniques to resolve situations.

HIGH Bias for Action

- Using data to ensure the developed systems and processes are impacting our goals.
- Using data as evidence to develop a budget and resource plan, as well as adjusting that plan over time.
- Thinking critically how all individuals contribute to broader goals, and maintaining focus on those priorities.
- Maintaining coalitions of support for the outcomes, despite competing needs or dissenting views felt by partners.

HIGH Disciplined and Strategic Thinking

- Identifying actions to drive improvement while also maintaining accountability for achieving outcomes.
- Using a disciplined and data-driven approach to defining the problem and testing sustainable solutions.
- Understanding how undetermined factors might impact work and mitigating those risks as possible.
- Rigorously questioning assumptions and understanding which information is best used to make a decision.

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V · JOB ARCHITECTURE

The role profile.

Every exhibit has the same six parts, in the same order. Write every role on the team the same way, and the profiles line up: the same scorecard climbing the ladder, the same disciplines at rising complexity.

PART	WHAT IT IS FOR
The header	Organization, department, manager, direct reports, and the classification. Where the role sits, and who it answers to.
The mission	One paragraph: why the role exists. If it cannot be written in a paragraph, the role is two roles.
Essential duties	What the person does, each line starting with a verb. The work, not the hours.
Key performance indicators	Three, numbered. What the role is measured by — the same numbers the business reads.
Skills and experience	What a person needs on the first day. Short, and only what can be checked.
Competencies and proficiencies	The three disciplines, each tagged LOW, MOD or HIGH for the role's situational complexity, with the proficiency statements lifted straight from the matrix.

The scorecard, up the ladder

ROLE	KEY PERFORMANCE INDICATORS
Customer Success Manager	Gross revenue retention for the assigned portfolio · net revenue retention, with expansion · customer health, with NPS and CSAT
Manager, Customer Success	The same three, for the team's whole book
Customer Success Operations Manager	Playbook utilization and actualization · capacity model utilization and actualization · internal customer satisfaction
The Customer Success executive	Gross revenue retention · net revenue retention · NPS · CSAT

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V · JOB ARCHITECTURE

The Operations track.

The ladder in Part II climbs from Customer Success Manager I to the Manager of Customer Success. Operations is the other way up: the same twelve competencies, practiced on the team instead of the customer. One example for each, at the level of a Customer Success Operations Manager.

COMPETENCY	IN OPERATIONS
Organizes Work using Processes	Implements and runs the systems the Success team works in, and keeps the data in them clean enough to trust.
Manages Resources Effectively	Directs a cross-functional effort to define how churn is measured, analyze its impact and its types, prescribe the plays that answer it, and synthesize a forecast of the churn still to come.
Aligns Priorities and Efforts to Goals	Tracks the leading indicators of renewal and expansion, and reads them for what is working and what is not.
Gains Consensus on Outcomes	Brings Sales and Marketing activity into the retention and referral plan, so three teams pull toward one number.
Strives for Continuous Improvement	Coordinates the cross-functional processes — with Product, Engineering, Support and Sales — that meet the team's targets and deliver what customers need.
Creative and Rigorous Problem Solving	Sees the pattern behind isolated exceptions, opens a review with the stakeholders, and writes the policy and the training that handle the next one.
Comfort with Complexity and Ambiguity	Equips the Success team with the materials and data that let them work better — health scores, alerts, early warnings — before anyone asks.
Demonstrates Good Judgment	After an acquisition brings in a new product and its customers, builds the program that prepares the team for the challenges that customer base predictably brings.
Conveys Information Clearly	Decides the timing and content of the touchpoints along the customer journey, so each Success Manager says the right thing at the right moment.
Builds Authentic Relationships	Finds the customers ready for more, with the criteria that make them ready, and puts them in front of the right Success Manager.
Inspires and Motivates Others	Keeps the team steady when the work is not, and makes room for the ideas that improve the service customers receive.
Resolves Conflict through Empathy	Detects the early signals of an at-risk customer, designs the play that answers them, and gives every Success Manager a clear path to escalate.

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V · JOB ARCHITECTURE

The role brief.

Before a role is posted, one page that says why it exists and how you will know you hired well — written by the hiring manager, from the model, before anyone writes the job description. NEW IN THIS EDITION

SECTION	WHAT TO WRITE
1 · Mission	Why the role exists, and why now. Two sentences.
2 · Outcomes	Three to eight measurable results the person should deliver in their first year. These become the KPIs.
3 · Complexity	LOW, MOD or HIGH for each discipline — Bias for Action, Disciplined and Strategic Thinking, Building Effective Relationships — with one sentence on why.
4 · Competencies to test	The three to five competencies that matter most for this role, each pointing to its questions in Part III.
5 · The first ninety days	What done looks like at thirty, sixty and ninety days.
6 · The interview team	Who interviews, and which discipline each of them tests — so no discipline is tested twice and none is missed.

> **WHAT THE BRIEF LEAVES OUT**
>
> Pay, equity, where to recruit from, and the posting itself. Those come later, from other people; the brief is the hiring manager's promise about the job, made before the market has a say in it.