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The Customer Journey.

A model: the story of how a company delights its customers, written as forty-two moments — each with the signal that starts it, the outcome that ends it, the one team that owns it, and the milestone it touches. With the workbook that is the map.

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Model · Version 1.2
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CONTROL

The story of how we delight customers.

The Operating Model says how a Customer Success organization is built. This model says what it does to a customer, in order: every step a customer takes with a company, from the first lead to the renewal, written down with who owns it and how anyone would know it happened. It is the spine the plays hang from — every play on this shelf is a moment on this map, and every moment touches one of the Operating Model's twelve milestones.

VERSION	DATE	AUTHORITY	NOTES
1.2	October 2026	Juan Carlos González II	Two vocabularies: the forty-two become *moments*, each mapped to one of the Operating Model's twelve *milestones*; the twelve drawn as the backbone; stage four named Expansion
1.1	October 2026	Juan Carlos González II	First public edition: the three maps merged into forty-two generic milestones; the stage principles, the gates and the challenge lanes written out; the four plays placed as milestones; every product-specific milestone generalized away; renewal nurture made trigger-based; the workbook built with an owner check and a per-account tracker
1.0	2017 – 2019	Juan Carlos González II	Built three times: in 2017 as Senior Director of Customer Success at a hospitality-software company in the Vista Equity portfolio — forty-nine moments across eight functions; in 2018 as Vice President of Customer Success at a managed file transfer and network management software company; and in 2019 at a financial services software company, where the 2018 map carried over almost whole

HOW TO USE THIS MODEL

Pages 4–5 are why a journey is worth mapping at all. Pages 6–12 are the model: the stages, the anatomy of a moment and the two vocabularies, the whole map on one page, then onboarding, adoption, the challenge lanes and renewal in turn. Pages 13–14 are who does what, and how to build your own map in ninety days. Then open the workbook and rewrite every blue cell for your company.

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I · WHY

A journey starts with a vision.

Every company is in business because it has an idea of what the world should look like. The vision says what that world is; the mission says how the company will make it so. A customer journey anchors the customer's experience in that vision, executed through that mission — and the best visions are the ones that inherit the customer's own.

VISION

What the world should look like

Broad enough to hold the company's ambitions, not so broad that nobody can relate to it. One company decided to build happiness and ended up in films, parks and every kind of human delight; its rival decided to make cartoons, and made cartoons. Businesses change and adapt. A well-set vision shouldn't.

THE CUSTOMER'S VISION

Inherited, not imposed

The strongest vision I ever worked under said, in effect, *our purpose is to help our customers achieve theirs*. That sentence makes the customer's dream the company's, and it makes the journey the place where the two are aligned: the company can focus on its mission and the customer can focus on their dreams.

THE STEWARD

Customer Success owns the journey

In a company that says its customers' vision is its own, Customer Success becomes the hub of the wheel. Product takes its cues from Success; Support takes its cues from Success; leadership asks Success what customers want. Success doesn't do most of the journey — it brings out the best in every team that does.

Two documents, one journey

A journey has two halves, and companies usually write only one. The **engagement model** is the story of how we delight customers in partnership — the stages and the principles, told from the customer's side. The **operating framework** is the programs that govern every process and touchpoint behind that story — who does what, triggered by what, finished when. This model is both: the stages on page 6 are the story; the forty-two moments on page 8 are the framework.

STAGES IN THE JOURNEY ARE SUCCESS STEPS

We tend to think of moments as our own actions: activated, walked through, ticket resolved. In a customer-centric model the moments are the steps the customer takes toward their own desired business outcomes. Every outcome on this map is written as a state of the customer — "the customer confirms value," "the customer is mature" — never as an activity of ours. That one discipline is most of what separates a journey from a process map.

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I · WHY

Why map it.

Finis origine pendet — the ending depends upon the beginning. Customers leave for three reasons, all of them controllable, and each is decided at a place on the journey you can name in advance — most of them near the start. A map is how a company stops being surprised by its own churn.

CAUSE ONE

Improper solution

"What you sold me, I did not need." The hardest churn to win back, and it is decided in acquisition. Success isn't solely responsible for the sale, but it is accountable for making sure the customer has a solution that works for them — which is why Success has a role in moment 4.

CAUSE TWO

Incomplete value

"I'm using it, but I don't see what it does for me." "I don't think it's worth what I'm spending." Decided in early adoption, at the Value Workshop or in its absence. Value the customer can't articulate is value they won't renew.

CAUSE THREE

Inconsistent adoption

"I'm paying for something I don't use." Decided in the first ninety days, when the habit forms or doesn't, and re-decided every time a customer's staff turns over. The health score watches for it; the Adoption Workshop answers it.

WHERE CHURN IS BAKED IN

In my career, churn has had one birthplace more than any other: Hypercare, the ninety days after onboarding. That is when the time-to-value question solidifies in the customer's mind — *was this worth the price I just paid? Did I make the right decision? What is my experience like at the start?* — and once those answers settle, they are very hard to reopen. A renewal conversation in month twenty-two mostly reads back what month two wrote. That is why both of this map's gates sit inside those ninety days.

FROM	THE LEGACY MODEL	THE ENGAGEMENT MODEL
Horizon	Tactical operations, short-term	**Strategic execution, long-term**
Financial role	A cost center	**A revenue driver**
Action	Reactive	**Proactive**
Goal	Responsive	**Predictive**

What a lost customer costs

In traditional SaaS, a customer is paid for before they are earned. The company spends the cost of acquiring them up front, then waits out the payback period — in my experience ordinarily thirteen to fourteen months before the customer's monthly rate has repaid that cost and starts showing positive gross profit. It is why so many contracts run twenty-four months or longer, and why the first year decides the economics: a customer who leaves inside the payback period never paid for themselves, and everything spent winning them leaves with them. The journey is where that money is protected, and the map is how you see it.

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II · THE MODEL

Four stages.

Four stages, the same at every company I built them for. Each has a one-line definition the whole company can repeat, and three or four principles that say what Customer Success is for inside it.

STAGE 1

Acquisition

Attracting customers by identifying leads, converting them to opportunities, and engaging through a validated solution.

- Introduce Customer Success to the prospect as a differentiator in the pre-sales phase.
- Ensure every customer has clearly identified business challenges and opportunities driving the decision.
- Confirm the solution has been validated to meet the customer's needs.
- Drive a clean transition into onboarding: a comprehensive, coherent start to the relationship.

STAGE 2

Onboarding

Setting customers up for success by implementing their solution and ensuring their users are activated and trained.

- Facilitate an overview of what was purchased, framed by why it was purchased.
- Supervise the implementation for timely, relevant delivery of a complete, cohesive, consistent solution.
- Build confidence as a trusted advisor by naming challenges and opportunities early.
- Induct the customer into the community and prepare them for adoption.

STAGE 3

Adoption

Engaging customers to drive loyalty and instill delight by delivering value to their business.

- Monitor customer health by interpreting signals as opportunities to drive success.
- Align roadmaps through proactive engagements that unite the two visions.
- Deliver prompt, professional service through relevant resolution of escalated concerns.
- Promote the customer's business through the depth and breadth of a maturing partnership.

STAGE 4

Expansion

Advocating for the partnership by aligning roadmaps and executing on joint priorities and growth — which is what renewal looks like when it is done early.

- Energize the customer by anticipating their needs; build an accountable, transparent relationship.
- Engage for an enduring partnership by extending additional value at every opportunity.
- Empower the customer's people by immersing them in the community and the brand.

INSIDE ADOPTION

Early, then ongoing

Early adoption is the ninety days after go-live — Hypercare — closed by a graduation checkpoint. **Ongoing adoption** is everything after, run on signals. Churn is baked in, or kept out, before the split.

BESIDE ADOPTION

The challenge lanes

Seven moments that can happen at any time after go-live — a service failure, a dispute, a downgrade, a silence. They sit beside the path rather than on it, and each says exactly when Success is pulled in.

VARIANTS

A partner in the middle

Where customers come through a channel partner, the stages don't change; a partner manager is added beside the CSM at each one. Page 13 gives the split.

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II · THE MODEL

The moment.

The unit of the journey is the moment, and every moment answers the same questions: what is it, what starts it, how do we know it is done, and who does what. Every map I built used that shape — and every moment touches one of the twelve milestones the organization runs.

THE STORY

What it is

A name a customer would recognize: “Value Workshop,” “Renewal,” “Challenge: downgrade.” Short enough to say in a meeting.

THE SIGNAL

What starts it

An event you could see in a system or hear from a customer: “thirty days after go-live,” “the customer disputes an invoice.” If you can’t name the signal, the moment happens by accident.

THE OUTCOME

How we know it is done

A state of the customer, not an activity of ours: “the customer confirms value,” not “CSM held a meeting.” The outcome is the exit criterion, and it is the customer’s to grant.

THE CODES

Who does what

A code for each of eight functions. **R** owns the moment — exactly one. **A** is held to account for a defined part of it. **C** is consulted. **I** is informed. Then the milestone it touches.

One row of the map, as the workbook holds it:

NO.	MOMENT	SIGNAL	OUTCOME	SUCCESS	SALES	ONBO	SUPPORT	MARK	PRODUCT	FINANCE	PARTNERS
17	Value Workshop → milestone 06	Thirty days after go-live.	The customer confirms value and utilization with Success.	R	A	·	·	·	A	·	·

Four rules for writing them

1. **One owner.** Every moment has exactly one R. Two owners is no owner; the workbook’s owner check turns red when a row breaks the rule.
2. **A answers to the owner.** In a textbook RACI the A answers for the outcome; here that is the R, and A is any function held to account for a defined part of the work in support of the owner. The row says for what.
3. **Name when Success is pulled in.** Where Success is not the owner, its action says when it engages. A map that doesn’t say so pulls Success into everything.
4. **The customer grants the outcome.** If the outcome can be achieved without the customer noticing, rewrite it.

TWO VOCABULARIES, ONE JOURNEY

The Operating Model names twelve **milestones**: what the organization does, the same at every company. A journey’s **moments** are what the customer experiences, and their number varies from journey to journey — forty-two here, forty-nine in my first map. Each moment touches one milestone, even one the Operating Model files under another stage: the Value Workshop happens in Hypercare and still touches milestone 06. The team needs both vocabularies; the customer only ever sees the moments.

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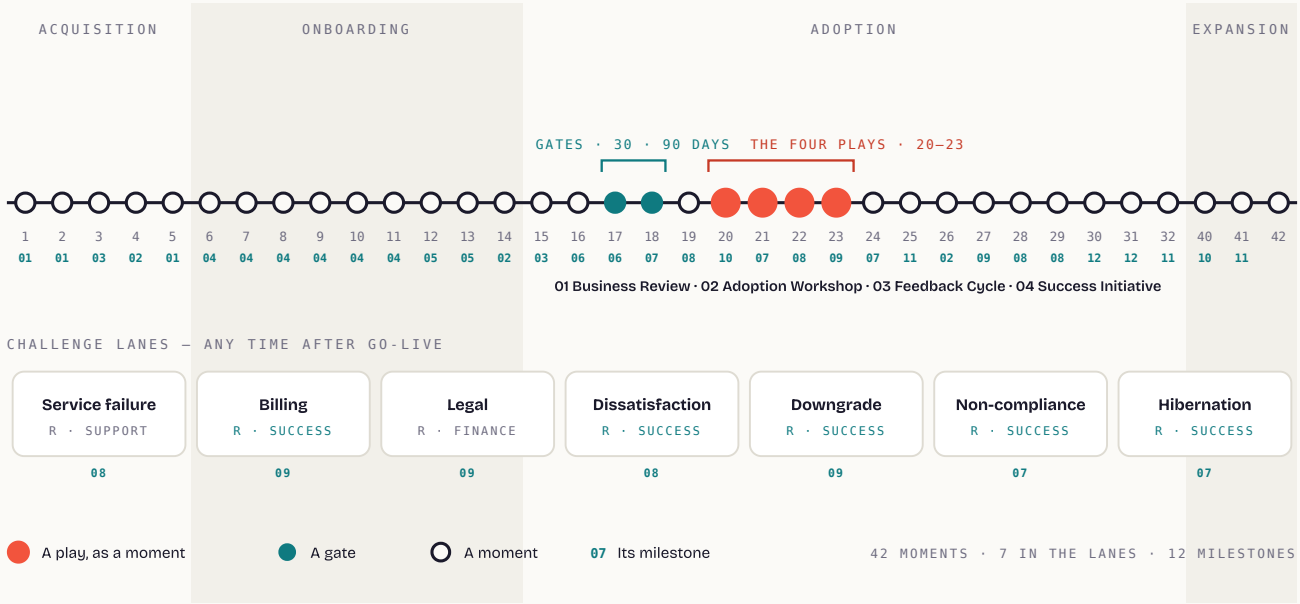
II · THE MODEL

The map on one page.

Forty-two moments: thirty-five on the path, seven in the challenge lanes beside it, each touching one of the twelve milestones — the teal number beneath it, and the table below. The four plays are moments with triggers of their own, and two gates — thirty days and ninety — sit inside the stretch where churn is baked in.



MILESTONE	MOMENTS TOUCHING IT
01 Lead generation	1 New lead pursued · 2 Existing customer lead · 5 Lost opportunity re-engaged
02 Opportunity pursuit	4 Customer accepts · 14 New need during onboarding · 26 Upsell, cross-sell or expansion
03 Solution validation	3 Discovery and analysis · 15 Onboarding validation
04 Customer enablement	6 Success assumes the relationship · 7 Kick-off · 8 Product overview · 9 Success plan · 10 Provisioning and configuration · 11 Configuration sign-off
05 Services training	12 Train the trainer · 13 Onboarding complete
06 Value workshop	16 Early-adoption action plan · 17 Value Workshop
07 Adoption and health	18 Graduation checkpoint · 21 **Adoption Workshop** · 24 Feature adoption · 38 Non-compliance · 39 Hibernation
08 Feedback cycle	19 Support case · 22 **Feedback Cycle** · 28 Incident · 29 Survey · 33 Service failure · 36 Dissatisfaction
09 Success engagement	23 **Success Initiative** · 27 Change in terms · 34 Billing · 35 Legal · 37 Downgrade
10 Business review	20 **Business Review** · 40 Renewal nurture
11 Customer nurture	25 Product release · 32 Anniversary · 41 Renewal
12 Loyalty actualization	30 Referral · 31 Public review
— the exit	42 Offboarding

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II · THE MODEL

Onboarding, the critical stage.

The customer only knows Sales when the contract is signed. Onboarding is where they meet everyone else — the beginning the ending depends on. Success doesn't run onboarding; it supervises it, and it owns the moments that are about the customer rather than the project.

MOMENTS 6 · 7

Transition and kick-off

Success introduces itself as the customer's partner and introduces the project manager as their day-to-day contact. The kick-off re-validates the solution, ratifies the plan and frames the project in the customer's value.

MOMENTS 8 · 9

Overview and success plan

Success delivers the overview personally — what was bought, and why — then writes the success plan with the customer: the goals, criteria and stakeholders that would make the purchase worth it, in their words.

MOMENTS 10 – 13

Configuration and launch

The project team configures; the customer signs off. Success trains the customer's trainers, who train everyone else. Go-live is monitored by Success; the project team stays on for thirty days, then hands the account to adoption.

ACTIVE, THEN PASSIVE

How Success engages

Active where it owns: the introduction, the overview, the trainers. **Passive** everywhere else: ensure others are on task, be available for escalation. The bottom line: monitor, review, and intervene as necessary. Watch for a customer who stops sending what the project needs — non-responsiveness in week two is churn in month four.

LAUNCHPAD BLOWUPS

Three causes, all controllable

Incomplete deployment — the customer went live on a solution that wasn't finished. **Improper solution** — the sale didn't fit, and onboarding found out. **Inconsistent adoption** — the trainers were trained and nobody else was. Count them, and read every one.

A SUCCESSFUL PROJECT

Five traits

Validated — the solution fits the need. **Aligned** — both sides agree on the plan and the outcome. **Integrated** — the teams hand off cleanly. **Timely** — dates are kept, or moved before they are missed. **Relevant** — every session is about the customer's business, not the product's features.

BEFORE THE FIRST WALKTHROUGH

For a new customer, the conversation about their business goals comes before the first product walkthrough, not after it — because it becomes the driving factor in how the walkthrough is given. Never again should two walkthroughs be the same.

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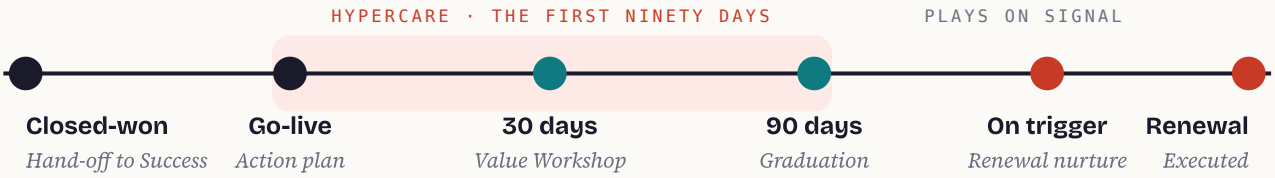
II · THE MODEL

Adoption: the gates and the plays.

Adoption is the stage most critical to the customer and the one Customer Success owns outright. It opens with ninety days of Hypercare closed by two gates, then runs on signals — and the plays are what the signals call.



GATE ONE · 30 DAYS

The Value Workshop

After the first full month live, Success sits with the customer and confirms value and utilization: what are you doing differently because of this? It is also where the survey is established across the customer's stakeholders. A customer who can't answer at thirty days won't at renewal.

GATE TWO · 90 DAYS

Graduation

At ninety days live, Success reviews the account and, as the tier warrants, holds the graduation conversation. The outcome: Success confirms the customer is mature. Hypercare ends, and the account takes the touch its tier earns — and becomes eligible for the survey and the referral ask.

AFTER GRADUATION

At least monthly

Every customer gets at least one touch a month — an automated email or a phone call, chosen by its signals and its tier. Diving in constantly is doing it wrong; silence for a quarter is doing it worse. Silence is a signal, not a steady state.

PLAY	MOMENT	SIGNAL	OUTCOME
Play 01	Business Review	The customer is due, by tier, timing or need.	The customer has re-validated the value proposition and roadmap alignment.
Play 02	Adoption Workshop	A signal shows adoption weakening.	The customer is restored to adopted status.
Play 03	Feedback Cycle	The customer signals feedback on software, service or support.	The customer agrees the options delivered address their concerns.
Play 04	Success Initiative	Signals show operating challenges — cases, escalations, risk.	The customer confirms every challenge identified is resolved.

Each play is written up on its own on this shelf. The map holds only what the journey needs: the trigger that calls the play, and the state of the customer that ends it. The Customer Health Score is what reads the signals.

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II · THE MODEL

The challenge lanes.

Some moments have no place in the order: they can happen any day after go-live. My first map had eight lanes, mostly for the specifics of that product; the second generalized them. What every version insisted on is that each lane say exactly who owns it and exactly when Success is pulled in — so that Success is pulled into the right things and only those.

LANE	SIGNAL	OWNER	WHAT SUCCESS DOES
Service failure	The customer reports a technical, service or payment failure.	Support	Engages only if the customer rejects the solution offered, or a significant sum or trend is flagged.
Billing	The customer disputes an invoice, or is placed on credit hold.	Success	Owns the conversation; Finance is the resolution partner.
Legal	The customer implies a legal dispute.	Finance	Refers the matter to Finance and ceases further communication — as does everyone.
Dissatisfaction	The customer asserts the service is not what was expected.	Success	Runs a structured call and gains agreement on the resolution.
Downgrade	The customer seeks to consolidate or downgrade.	Success	Diagnoses the reason before negotiating the terms.
Non-compliance	The customer ceases normal behavior without notice.	Success	Treats silence as a signal, not a steady state.
Hibernation	A qualifying event — seasonality, a restructuring, force majeure.	Success	Agrees the hibernation terms and the date to wake.

LEGAL

Everyone stops

When a customer refers legal action, or names a lawyer, every team refers the matter to Finance and ceases further communication. All internal correspondence copies Finance. It is the only moment where every function has the same action, and it is written that way on purpose.

NON-COMPLIANCE

Silence is a signal

A customer who stops behaving normally — stops transacting, stops paying, stops logging in — without telling anyone is not in a steady state. It is in a deteriorating one. Success owns it because nobody else will notice.

DISSATISFACTION

Telling them no

When the customer says the service isn't what they expected, the answer is a structured conversation that ends in agreement — and sometimes it is no. Not because no is the most service-oriented response, but because it is the most success-oriented one.

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II · THE MODEL

Expansion: renewal, and the way out.

Three moments close the map, in the stage the Operating Model calls Expansion — which is what renewal looks like when it is done early. Two of them are about keeping the customer, one is about letting them go well — and all three are owned or declared by Success, because the relationship is Success's to keep or to end.

MOMENT 40

Renewal nurture

Starts on a trigger, not a date. Reactive organizations wake up thirty to sixty days out, after the decision is made. Here the first trigger wins: health turning Yellow or Red in the last six months, the customer's budget cycle opening, or the lead time the tier sets from the customer's own buying cycle. Success holds a renewal business review whose only purpose is to re-align value.

MOMENT 41

Renewal

Success leads the renewal on mutually acceptable terms; Finance authorizes anything that deviates from standard. The customer executes an affirmative renewal — not an auto-renewal they didn't notice, which renews a contract and not a relationship. Marketing sends the renewal welcome.

MOMENT 42

Offboarding

When a customer has churned and cannot be saved, Success declares it, holds a pre-offboarding conversation, and follows the case until every system is clean. Support executes; Finance closes. The reason is recorded at the moment it is known — and the churn is dated by the customer's last transaction, not by the day the paperwork caught up.

Five traits of a successful partnership

1	2	3	4	5
Timely Acknowledge the same day; resolve within the week.	Relevant Arm the customer with something they can apply.	Transparent Here's what you need, and here's what we think you need.	Accountable Each side invites the other to hold it to its word.	Strategic Not a problem-solver: the one who knows who should solve it.

I taught these five to every team that inherited one of these maps, because they are the test of whether the journey is working at any moment you stop on. A Business Review that is late fails the first; one full of product features fails the second; one that hides the bad quarter fails the third. The map tells you where you are. The traits tell you how well you are doing there.

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III · RUNNING IT

Who does what.

Eight functions appear on every row. Read across a row and you see a moment; read down a column and you see a team's whole job in the customer's life — which is the conversation the map is really for.

FUNCTION	OWNS	ACCOUNTABLE	TOUCHES	ITS PART IN THE JOURNEY
Success	23	13	41	The steward. Owns the relationship moments and the plays; accountable or consulted almost everywhere else.
Sales	6	13	25	Acquisition, and every new need — including the ones Success surfaces.
Onboarding	4	8	18	The project: kick-off, provisioning, configuration, completion.
Support	4	14	24	The day-to-day point of entry; cases, incidents, service failures, offboarding.
Marketing	4	9	17	Releases, reviews, anniversaries, the welcome and the renewal package.
Product, Finance, Partners	0 · 1 · 0	9 · 11 · 6	15 · 13 · 9	Rarely owners, always present: the feedback loop, the money, the field.

READING THE COUNTS

Success owns half, by design

The steward owns about half the moments and touches nearly all of them. Any other function owning more than a quarter is carrying work the map should spread; one that is only ever Informed has been left out of the journey. The workbook's Functions tab does this count for you.

WITH A CHANNEL PARTNER

Two managers, one customer

The partner manager manages the partner; the CSM manages the customer. In acquisition the partner manager leads and introduces the CSM; in onboarding the CSM takes the customer; in adoption both sit in the business reviews and jointly lead a partnership review; at renewal the partner manager sells and the CSM sources referrals.

DAY TO DAY

Not the CSM

A customer's day-to-day contact should be Support or the project team, never the CSM. The map makes that explicit: Support is accountable in fourteen moments and redirects strays back to the CSM only where the CSM is the owner.

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III · RUNNING IT

Building your map, and the checklist.

Ninety days from a blank workbook to a map every team has agreed to and every account is tracked against. The first draft is the easy part; the agreement is the work.

WEEKS ONE TO THREE

Draft it

Start from the forty-two in the workbook. Delete what you don't run; add what you do. Write every signal as an observable event and every outcome as a state of the customer. Give every row exactly one owner. Name, for every lane, when Success is pulled in.

WEEKS FOUR TO EIGHT

Agree it

Walk the map with each function, one column at a time: "this is your job in the customer's life — is it right?" Fix the owner disputes in the room. Read the Functions counts together. Publish one map, company-wide, as the single source of truth.

WEEKS NINE TO THIRTEEN

Run it

Load every account into the Tracker with its go-live and renewal dates. Review the overdue gates every Monday. Wire the signals into the health score. Teach the map in an hour to every new hire, in every function — and re-read it against the quarter's churn.

WRITE

- [ ] Four stages, each with a one-line definition
- [ ] Three or four Success principles per stage
- [ ] Every signal observable; every outcome the customer's
- [ ] Exactly one owner per moment
- [ ] Every moment mapped to one of the twelve milestones
- [ ] The four plays placed as moments with triggers
- [ ] The thirty- and ninety-day gates
- [ ] Renewal triggers and lead times by tier
- [ ] Every challenge lane says when Success engages

EVERY WEEK

- [ ] Tracker reviewed: overdue Value Workshops and graduations
- [ ] Renewal triggers read; accounts entering nurture identified
- [ ] New customers loaded on closed-won

EVERY QUARTER

- [ ] Churn read against the moment where it began
- [ ] Launchpad blowups counted and read
- [ ] One moment rewritten that the quarter proved wrong
- [ ] The map walked again with one function

EVERY YEAR

- [ ] The whole map re-agreed, function by function
- [ ] The five traits tested at five moments
- [ ] Does every new hire know where their team sits on it?

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