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The Customer Success Operating Model.

What Customer Success is, who it serves, how it is organized, and how a customer moves through it — the model behind the motions.

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CONTROL

A model, not a memo.

This document began as three internal briefings I wrote as Senior Vice President of Customer Success at a venture-backed software company — an introduction to Customer Success, to the customer journey, and to business reviews — and the quarterly strategy I reported to its leadership team. The company's particulars are gone — its name, its numbers, its people. The model they illustrated is here whole, because it was never about that company.

VERSION	DATE	AUTHORITY	NOTES
1.3	November 2026	Juan Carlos González II	Every motion at every tier, and the two standards every motion keeps: One, Three, Seven; and Evaluate, Analyze, Synthesize. The milestones pointed to the Customer Journey's moments; all four plays linked; Earn, Grow, Retain redrawn
1.2	November 2026	Juan Carlos González II	Services named as the workstream and the function where this edition said Onboarding: onboarding is a stage, and Success, Support and Services all deliver it; the plays now on the shelf named and linked
1.1	October 2026	Juan Carlos González II	The customer profile, the value curve, milestone signals and a quarter in the model, from the Q1 2022 leadership report
1.0	October 2026	Juan Carlos González II	First public edition, rebuilt from the three briefings (2022) as a Juan.co playbook

HOW TO READ THIS DOCUMENT

Part I defines the discipline and how it is measured. **Part II** defines the customer — by value, and by temperament. **Part III** is the organization: what it exists to do, how it is built, and how it is sized to the customer. **Part IV** is the journey: twelve milestones, the value curve, and the signals that make milestones real. **Part V** is the four motions the organization runs, how each runs at every tier, the two standards they all keep, and what a quarter of them looks like.

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PART I · WHAT CUSTOMER SUCCESS IS

Experience, evolved.

Customer Success is what happens when a company stops treating the people who already pay it as a cost to be contained and starts treating them as the revenue that has not been earned yet. Everything else in this model follows from that one change of mind.

Most companies arrive at Customer Success by renaming a support team. The name changes; the model does not. The table below is the difference, and it is the first thing I put in front of a new organization, because every argument we will have later — about headcount, about metrics, about who owns the renewal — is an argument about which column we are in.

The legacy model

FINANCIAL	Cost center
ACTION	Reactive
METRICS	Efficiency-oriented
MODEL	People-intensive
GOAL	Responsive

The mature model

FINANCIAL	Revenue driver
ACTION	Proactive
METRICS	Success-oriented
MODEL	Analytics-focused
GOAL	Predictive

Read down the right-hand column and notice that none of it is about being nicer to customers. A mature Customer Success organization is a revenue function that happens to be staffed by people who like customers. It acts before it is asked, it measures outcomes rather than tickets closed, it runs on data rather than heroics, and its ambition is to know what a customer needs before the customer does. The legacy model answers the phone. The mature model knows who is going to call.

> THE TEST
>
> Ask who in the company is accountable for net revenue retention. If the answer is "sales," you are in the left column, whatever the org chart says.

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PART I · WHAT CUSTOMER SUCCESS IS

Things we do, signs we see, success we share.

A Customer Success organization is measured in three layers, and the mistake most of them make is reporting the first layer as if it were the third.

ACTIVITY

Things we do

What the team did this week.

- Proactive touchpoints
- Reactive escalations
- Success engagements
- Support cases
- Onboarding projects

SIGNALS

Signs we see

What the customer is telling us, whether they mean to or not.

- Customer health
- Net Promoter Score
- Customer satisfaction
- Expansions, cross-sells, upsells
- Referrals and opportunities

RESULTS

Success we share

What the business keeps.

- Gross revenue retention
- Net revenue retention
- Recurring revenue
- Lifetime value

ACTIVITY → SIGNALS → RESULTS · EACH LAYER PREDICTS THE NEXT, AND ONLY THE LAST ONE PAYS THE BILLS

Activity is the easiest to count and the least meaningful to report; a team can be magnificently busy and lose the customer. Signals are the layer worth watching daily, because they move before revenue does: health scores dip, a champion stops replying, an NPS detractor appears, a referral arrives unprompted. Results are the only layer the board cares about, and the only layer a Customer Success leader should put their name on.

The discipline is to run the organization on signals and report it on results. Activity gets measured so that it can be managed, not so that it can be celebrated.

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PART II · THE CUSTOMER

Value, and the effort rule.

You cannot serve every customer the same way, and you should not try. The first act of a Customer Success leader is to define the customer — twice: by what they have invested in the partnership over its life, and by what they invest in it now.

Two numbers do the work. **Lifetime value** — the customer's cumulative billings — is their *perceived* investment: what the relationship has meant. **Annual recurring revenue** is their *current* investment: what it means this year. Rank the customer base by each, cut it into three tiers, and the same shape appears every time I have done it. A small top earns most of the effort; a long tail earns the least; and the middle is where the leverage is.

10% of customers · the top	**50%** of the effort	**Enterprise.** High touch, dedicated resources, a specialized practice. Each account is a program with a name on it.
35% of customers · the middle	**40%** of the effort	**Mid-market.** Low touch, semi-dedicated resources, a generalized practice. Engagement is driven by health and opportunity, not by calendar.
55% of customers · the tail	**10%** of the effort	**Small and midsize.** Tech touch, shared resources, an automated practice. Excellent enablement does the work a person cannot afford to.

The percentages are not a law; they are what the ranking produced at a company with a few hundred customers, and they have held within a few points everywhere I have applied them since. The *rule* is the point: effort follows value, deliberately, in writing — so that when the loudest small customer demands the attention of the quietest large one, the organization has an answer that is not "whoever shouted."

> DO IT TWICE
>
> Rank by lifetime value and by ARR separately. A customer high on one and low on the other is a story — a shrinking enterprise, or a growing one — and the story is the account plan.

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PART II · THE CUSTOMER

Temperament: four psychographies.

Value tells you how much to invest in a customer. It does not tell you how to talk to them. For that, place them on two axes — the business impact they are after, and the sophistication they bring to it — and four kinds of customer appear.

← LOWER BUSINESS IMPACT — HIGHER BUSINESS IMPACT →

HIGH IMPACT · LOWER SOPHISTICATION

Disruptors

Challengers transforming their function through your platform. They want a lot and are not yet sure how to get it; they need a guide more than a tool.

HIGH IMPACT · HIGHER SOPHISTICATION

Strategists

Thought leaders using the platform to deliver dramatic results. They know what they are doing; they need a partner who can keep up, and a roadmap they can shape.

LOWER IMPACT · LOWER SOPHISTICATION

Tacticians

Customers addressing specific use cases or focused on discrete tasks. Serve them precisely and do not oversell; they will tell you when they are ready for more.

LOWER IMPACT · HIGHER SOPHISTICATION

Innovators

Visionaries who provoke organizational change and present new opportunities. Low impact today, by their own choice; the ones most likely to be high impact next year.

↑ LOWER SOPHISTICATION — HIGHER SOPHISTICATION ↓

Psychography decides the *engagement cohort*: what a strategic engagement with this customer should look like, how long it should run, and what it should aim at. The rule I used: strategic engagements are limited to seven-to-thirty-day cycles, aimed at a specific milestone, triggered by health signals — adoption and outcomes that predict where the account is going — and delivered according to the cohort. Universal cadences (the business review, the health check) run for everyone. The cohort shapes everything in between.

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PART II · THE CUSTOMER

The customer profile.

Value tiers say how much; psychography says how. One more page says *who* — the three traits of the market you serve that decide what every engagement has to be like. Write it once, for your own customers, and hand it to every new hire.

This is the profile I wrote for one market — professionals whose business runs on referrals and reputation, whose transactions are one-time events, and who have no patience for software that asks to be learned. Yours will differ in every particular and in none of the headings.

TRAIT 1

Bias for action

- A tactical focus — a "just get it done" mindset.
- Averse to self-help: they will not read the knowledge base.

So: simple messages — timely, relevant, valuable. Nothing that needs a second read.

TRAIT 2

Relationships

- They drive their own brand through word of mouth.
- One poor customer experience resonates across the entire market.

So: every interaction is a referral or a warning. Support quality is a growth lever, not a cost line.

TRAIT 3

Decision-making

- Low tolerance for failure; most of their transactions are non-recurring, one-time events.
- Moving the needle even slightly has a dramatic, material impact on their business.

So: consolidated, actionable communication — one page, one ask, one number that moved.

The profile earns its keep in the "so" lines. Each trait, taken seriously, forbids something the organization would otherwise do by default — long onboarding emails, a help-center-first support model, a quarterly report with forty slides — and the forbidding is the point. A customer profile is not a persona poster. It is a list of the ways you are not allowed to waste this customer's time.

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PART III · THE ORGANIZATION

Earn, grow, retain.

An organization needs a sentence it can say about itself, three principles it will not trade, and one approach that turns both into revenue. Here are mine; the company is yours.

VISION

One team

The Customer Success organization builds results-focused partnerships with the people who pay us, so that every interaction leaves the customer better off than it found them. It makes the company one team with three jobs: simplify work, drive growth, and delight.

PRINCIPLES

Three, not ten

Organize the key drivers of business results by disciplinary mindset. **Unify** the programs, people and processes that have a stake in the client's experience. **Transform** that experience through mature segmentation — by revenue and potential, by industry and market, by psychography.

APPROACH

Three verbs

Earn revenue through the delivery of value — a bias for action. **Grow** revenue by driving depth — relationships. **Retain** revenue by exposing breadth — strategy. Every team, program and metric in the organization serves one of these first and feeds another next.

Earn → **Grow** → **Retain**

Value, with a bias for action → *Depth, through relationships* → *Breadth, through strategy*

Notice that the three verbs are the three disciplines of the Competency Model wearing revenue clothes. A bias for action earns. Building relationships grows. Strategic thinking retains. That is not a coincidence; it is the point. The same three things a good executive does are the three things a good Customer Success organization does, and you can hire for the one with the other.

The cycle has a direction. Value delivered earns the right to go deeper; depth earns the right to go wider; breadth — the customer seeing the whole of what you can do for them — is what gets you renewed, which is where the cycle starts again. An organization that tries to retain before it has earned is the one sending the "we noticed you haven't logged in" email.

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PART III · THE ORGANIZATION

Core elements and departments.

Each element of the model, and each department that runs it, is accountable for one number, serves one verb first, and feeds the next. Writing the table down is how the organization stops arguing about whose metric is whose.

CORE ELEMENT	KPI	FACTOR — SERVES FIRST	CYCLE — FEEDS NEXT
Theory of the customer	Gross revenue retention	Earn	Retain
Customer journey	Net revenue retention	Earn	Grow
Voice of the customer	Net Promoter Score	Retain	Grow
The Customer Success organization	Customer health	Retain	Grow
Theory of change	Net Promoter Score	Grow	Earn
Partnership framework	Net revenue retention	Grow	Retain
Customer experience	Gross revenue retention	Retain	Grow

DEPARTMENT	KPI	FACTOR — SERVES FIRST	CYCLE — FEEDS NEXT
Success management	Net revenue retention	Grow	Retain
Support	Customer satisfaction	Earn	Retain
Services	Net Promoter Score	Earn	Grow
Enablement	Gross revenue retention	Retain	Earn
Operations	Customer health	Earn	Retain

WORKSTREAM

Services

Provides onboarding services to customers upon acquisition, ensuring they are properly configured and their users educated. Earns.

WORKSTREAM

Support

Ensures customer questions and issues are properly answered and addressed — technical assistance, platform education, solution guidance. Earns, so that success can retain.

WORKSTREAM

Success

Manages the overall customer experience, driving account retention and growth by supporting every team and advocating for the client's business outcomes. Grows.

Five domains surround the customer — training, onboarding, services, support, success — and the three workstreams above are how they are staffed. Enablement and operations are shared services: they belong to everyone, which is why they need a KPI of their own or they belong to no one.

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PART III · THE ORGANIZATION

Touch models and resourcing.

Segmentation is where the theory of the customer becomes a staffing plan. Three touch models, each with a threshold that qualifies a customer for it and a ratio that pays for it.

HIGH TOUCH

Dedicated

1:7 assigned

Minimum of $100,000 ARR. Fully dedicated success, services and support teams; enterprise support, executive success management, program management. Supported by digital touch to expand **depth**.

- Monthly meetings
- Quarterly reviews
- Bi-weekly support reviews

MEDIUM TOUCH

Shared

1:30 pooled

Minimum of $20,000 ARR. Engagement driven by opportunity cycles and customer health; concierge support, steward success management, project management. Supported by digital touch to expand **breadth**.

- Quarterly touchpoints
- Semi-annual reviews
- Quarterly reporting

LOW TOUCH

Digital

1:100 tech touch

An established account plan with defined scopes and contracts. Self-service through exceptional enablement; standard support, oversight success management, engagement management. Entirely automated, digital tech-touch sequencing.

- Digital engagements
- Just-in-time staffing
- Self-service

WORKSTREAM	DEDICATED	SHARED	DIGITAL
Success	Assigned, 1:7 — about 10% of accounts	Pooled, 1:30 — about 35%	Tech touch, 1:100 — about 55%
Services	Defined scope; quarterly reviews	Defined scope; semi-annual reviews	Defined scope; just-in-time staffing
Support	Enterprise queue; bi-weekly reviews	Concierge queue; quarterly reporting	Standard queue; self-service
Shared services	Enablement — special projects, team enablement, train-the-trainer. Operations — systems engineering, process optimization, workflows.		

The thresholds are the ones I set at a company whose enterprise accounts started around six figures; scale them to your price list. The ratios travel as they are.

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PART IV · THE JOURNEY

Twelve milestones, four stages.

The customer journey is the model laid out in time. Twelve milestones, four stages, one direction — and the direction is growth. A journey that ends at renewal is a journey that ends.

STAGE 1

Acquisition

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

01 **Lead generation**

02 **Opportunity pursuit**

03 **Solution validation**

STAGE 2

Onboarding

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

04 **Customer enablement**

05 **Services training**

06 **Value workshop**

STAGE 3

Adoption

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

07 **Adoption and health**

08 **Feedback cycle**

09 **Success engagement**

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.

10 **Business review**

11 **Customer nurture**

12 **Loyalty actualization**

Three things to notice. The first three milestones belong to sales, and Customer Success should be in the room for the third: solution validation is where the wrong customer gets sold the right product, and that is the most expensive mistake in the model. The value workshop at milestone six is the hinge — it is where onboarding stops being a project and becomes a relationship. And the business review at milestone ten is not a renewal conversation; it is the conversation that makes the renewal conversation unnecessary. It has a play of its own.

> MILESTONES AND MOMENTS
>
> The twelve milestones are what the organization *does*. What the customer *experiences* is moments: forty-two of them on the Customer Journey, each touching one milestone, sometimes one this page files under another stage. Keep both vocabularies. The team runs on the first; the customer only ever sees the second.

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PART IV · THE JOURNEY

Who does what, and why customers leave.

A journey with twelve milestones and five departments fails in the handoffs. RACI is the cheapest insurance there is: one letter per team per stage, agreed before the first customer arrives.

R
RESPONSIBLE
Executes the work, creates the deliverables, finishes the tasks.

A
ACCOUNTABLE
Reviews the work, assists, and ensures it is properly executed. One per stage.

C
CONSULTED
Provides feedback, advice or guidance to the teams doing the work.

I
INFORMED
Kept in the loop on progress; not involved in the decisions.

STAGE	SALES	SERVICES	SUPPORT	SUCCESS	ENABLEMENT
Acquisition	R	I	I	C	I
Onboarding	I	R	C	A	C
Adoption	I	C	R	A	R
Expansion	R	I	C	A	I

A default to argue with, not a law: the useful part of a RACI is the argument. Success is accountable from onboarding onward because someone has to own the customer across the handoffs, and it should be the team whose number is net revenue retention.

The three causes of churn

Every lost customer I have ever done the post-mortem on died of one of three things, and each one lives in a stage.

STAGE 1 · ACQUISITION

Improper solution

The customer was sold something that does not solve their problem. No amount of success management recovers this; only solution validation prevents it.

STAGE 2 · ONBOARDING

Incomplete value

The solution fits, but the customer never got to the value — configured, not activated; trained, not changed. The value workshop exists to catch this.

STAGE 3 · ADOPTION

Inconsistent adoption

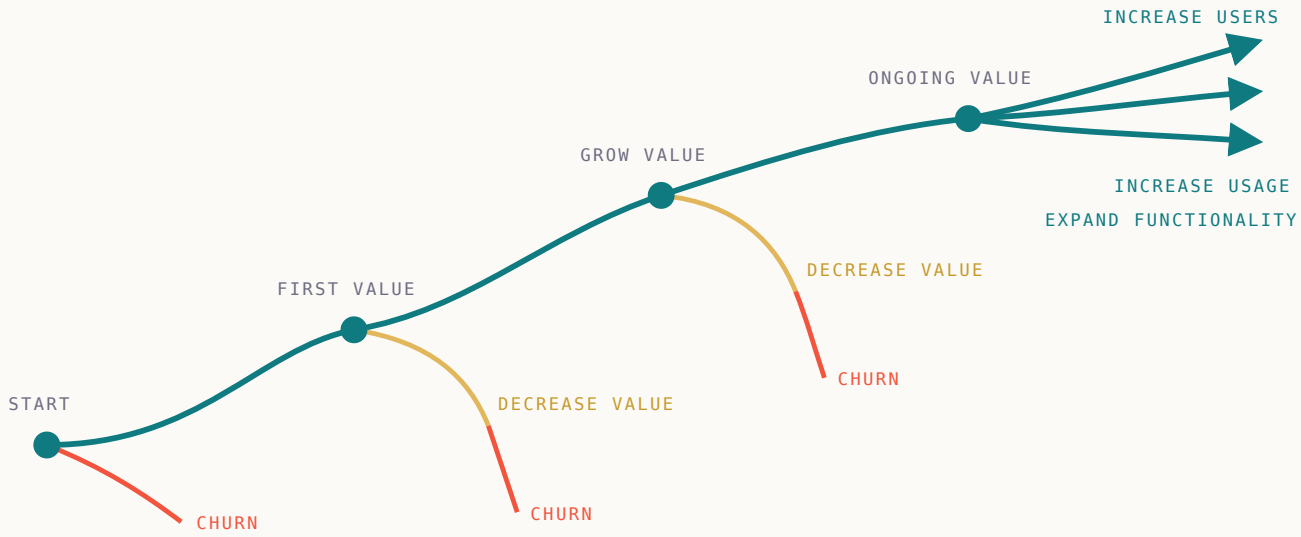
Value was delivered once and not again. Usage decays, the champion leaves, nobody notices until the renewal. Health signals exist to notice.

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PART IV · THE JOURNEY

The value curve.

The twelve milestones are the organization's view. The customer's view is simpler and more dangerous: a line that either rises or does not. Every node on it has one way up and one way out.



Three things the curve says that the milestone list does not. First, **there is a churn exit at every node, including the start** — a customer can leave before first value, and many do; that is the improper-solution churn from the previous page. Second, **value that stops growing starts shrinking**: there is no flat line, only the amber segment before the red one, which is what a health score is actually measuring. Third, **ongoing value has three doors** — more users, more usage, more functionality — and expansion is simply which door you walked the customer through. The business review is where you choose.

Put the curve next to the twelve milestones and the operating rhythm appears: onboarding exists to reach first value fast; adoption exists to keep the slope positive; the motions exist to catch the amber before it turns red; and expansion is not a sales event at the end but the natural continuation of a line that was already rising.

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PART IV · THE JOURNEY

Milestones have signals.

A milestone that nobody can see is a hope. For each one, write the story in a sentence, the signal that starts it, and the signal that ends it — in the systems you already have, so that the journey runs off data rather than memory.

The rows below are from the onboarding and early-adoption stretch of one company's journey, generalized; the pattern is what to copy. Every start signal is an event a system can emit. Every end signal is a fact someone is accountable for recording. Where a signal cannot be named, the milestone is not real yet.

NO.	STAGE	STORY	START SIGNAL	END SIGNAL
04	**Onboarding**	Pre-sale to post-sale transition	Opportunity marked closed-won in the CRM	A Customer Success Manager is listed as the account owner
04	**Onboarding**	Kick-off for enablement	The opportunity is in the services queue	Enablement scope has been determined
05	**Onboarding**	Customer training on the deliverable	Enablement scope has been determined	Customer Success verifies the customer has received initial adoption
06	**Onboarding**	Customer completes the engagement	Final delivery executed	The engagement is marked complete
06	**Onboarding**	Customer has expressed, or been identified with, a new need	Customer confirms the new need is relevant to their business	An opportunity is created in the CRM
07	**Adoption**	Challenge: onboarding validation	Customer is misaligned on contract, purchase or value	Customer Success confirms account alignment
07	**Adoption**	Early-adoption action plan executed	Enablement is marked complete	The early-adoption campaign is completed

Two of those rows are the same milestone with two stories — a milestone is not one event, it is the set of stories that get a customer from its start signal to its end signal — and one row is a *challenge*, a story that only runs when something has gone wrong. Write the challenges down too. They are the parts of the journey a new CSM most needs to have in writing, and the parts nobody thinks to document.

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PART V · THE FOUR MOTIONS

Support reimagined, services delivered, success managed.

Three departments, three imperatives — one sentence each that the team can hold me to, and the few things it has to be true of.

Support. Reimagined.

- An omnichannel, white-glove approach
- A disciplined problem-solving impulse
- Empathic response and resolution
- An obsession for client delight
- A consolidated bias for action

Support delivers a concierge experience for every client, in the application, by email, on the web, on the phone — and case management drives transparency through consolidated, actionable results. The customer should never have to tell us twice.

Services. Delivered.

- Onboarding onto the platform
- Joint platform development
- Enablement training services
- Assessments and health checks
- Principal business consulting

Services chooses the key moments through initiatives. The assessment — the "health check" — is the one I would keep if I could keep only one: evaluate the deployment against established benchmarks, analyze the opportunities and the challenges the stakeholders face, and synthesize a go-forward plan as a series of recommendations.

Success. Managed.

- Business reviews
- Feedback cycles
- Adoption workshops
- Success initiatives

Success models the engagement through strategy. Four motions on two axes — strategic or tactical, reactive or proactive — each with a play. They are on the next page, and each has a play of its own on the shelf.

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PART V · THE FOUR MOTIONS

The four motions.

A motion is a repeatable engagement with a purpose, a cadence, a channel and a deliverable. There are four, and they are not a list — they are a grid. Two questions place each: *what altitude*, strategic or tactical; and *what starts it*, a signal or the calendar.

	REACTIVE · STARTED BY A SIGNAL	PROACTIVE · STARTED BY THE CALENDAR
STRATEGIC · THE BUSINESS	**Adoption Workshops** Ensure the customer's teams are fully trained and realize business value from the solution. Strategic, because the subject is the customer's outcomes; reactive, because adoption signals — usage decaying, a new team arriving — call it. CADENCE THROUGHOUT THE JOURNEY, ON SIGNAL CHANNEL DIGITALLY · VIRTUALLY · IN PERSON DELIVERABLE TRAINING · KNOWLEDGE BASE PLAY THE ADOPTION WORKSHOP →	**Business Reviews** Leverage the insights from the work done together, align the customer's business challenges with the product roadmap, and prioritize new opportunities. Strategic and proactive: the only motion that is both, which is why it is the one that grows the account. CADENCE QUARTERLY AND SEMI-ANNUALLY CHANNEL DIGITALLY · VIRTUALLY · IN PERSON DELIVERABLE THE DECK · THE JOINT SCORECARD PLAY THE BUSINESS REVIEW →
TACTICAL · THE WORK	**Feedback Cycles** Uncover the business problems the customer's team is trying to solve for *their* customers, and provide short-term options and long-term solutions. Tactical, because the unit is a problem; reactive, because the customer brings it — through the concierge, through an engagement. CADENCE CONCIERGE- AND ENGAGEMENT-DRIVEN CHANNEL DIGITALLY · VIRTUALLY · IN PERSON DELIVERABLE OPTIONS · A RECOMMENDATION PLAY THE FEEDBACK CYCLE →	**Success Initiatives** Interventions designed to confront opportunities and pursue challenges — the seven-to-thirty-day engagements aimed at a milestone, shaped by the customer's cohort. Tactical, because each has a scope and an end; proactive, because we schedule them, or health triggers them before the customer notices. CADENCE SCHEDULED · HEALTH-TRIGGERED CHANNEL DIGITALLY · VIRTUALLY · IN PERSON DELIVERABLE ASSESSMENTS · PLANNING PLAY THE SUCCESS INITIATIVE →

Read the grid as a diagnosis. An organization that lives in the bottom-left — feedback cycles, all day — is a support team with a new name; one that lives only in the top-right is a sales team that has forgotten to deliver. A mature one runs all four: the tactical motions keep the customer, the strategic ones grow them, the reactive ones earn trust, the proactive ones spend it well.

The next two pages are what the four have in common: how each one runs at every tier, and the two standards none of them bends.

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PART V · THE FOUR MOTIONS

Every motion, every tier.

Touch is the customer's attribute, not the motion's. Every tier gets all four motions; the tier decides the form: how much time, which channel, who is in the room. A customer should be able to tell their tier by how much of our time they get, never by which motions they get.

MOTION	DEDICATED	SHARED	DIGITAL
Business Review	Every quarter, customized and held in the room, with every stakeholder properly peered	Every six months, a template with the slides chosen from options; sent by email, with an optional call	A series of emails, one a quarter, from the Success Manager's own name
Adoption Workshop	The full hour, stretched to ninety minutes for a large room; in person where it matters	Thirty minutes, live, one objective, built from training content you already have	An email and a video: one action, and an invitation to reply or call
Feedback Cycle	Always a structured call; the answer carried into the next business review	A call for detractors and requests; an email template for the rest, with a call offered	Written, with a call offered. A detractor still gets a person
Success Initiative	The full play: a weekly call between named leads, the executive sponsors informed at open and close	The same page and tracker, a shorter scope, the weekly call held to thirty minutes	One consolidated case for the account, reviewed from afar, the customer told by email

Read the table across, not down. Across a row, the form changes and nothing else does: the trigger that starts the motion, the clock that answers it, and the exit that ends it are the same for the largest customer and the smallest. Down a column is a staffing plan, and it is only as good as the thresholds and ratios that put a customer in the tier, on **page 11**.

> THE LINE NO TIER CROSSES
>
> Digital is a channel, not a lesser promise. A detractor gets a person at every tier, every request is acknowledged the same day at every tier, and no customer learns about a decision from a template that a person should have delivered.

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PART V · THE FOUR MOTIONS

Two standards every motion keeps.

Four motions and three tiers are held together by two standards that do not vary by play or by tier: a clock for answering, and a method for thinking.

One, three, seven

One
The same day

→

Three
Within three days

→

Seven
Within seven days

The same day: acknowledge the request. **Within three days:** a touchpoint that consolidates the feedback and makes it actionable. **Within seven days:** a major update, or the complete resolution or action plan.

It is a standard, not a feature of any one play. Every reactive motion carries it word for word, and a success initiative keeps its dates. The clock starts when the customer asks, not when we notice; and a date we give is a date we keep. More in the note One, Three, Seven.

Evaluate, analyze, synthesize

Evaluate
What is going on?

→

Analyze
What does it mean to them?

→

Synthesize
Options, or a plan

Evaluate: what is going on? **Analyze:** what does it mean to the customer's business? **Synthesize:** options and a recommendation, or a plan.

It is how Services runs a health check, how a feedback cycle builds its answer, and how an adoption workshop plans for more value: the same three steps, whatever the subject. Skip the second and the answer is about us; skip the first and it is about a guess.

> WHY STANDARDS, AND NOT RULES
>
> A rule tells a team what to do in the case someone foresaw. A standard tells them what good looks like in the case nobody did. These two are short enough to say in a hallway, and that is the point: a standard nobody can recite is a standard nobody keeps.

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PART V · THE FOUR MOTIONS

A quarter in the model.

A model that cannot be run in ninety days is a poster. This is what one quarter looked like when I ran it: three sprints for retention, one pipeline for the enterprise tier, and a health check for everyone else.

SPRINT 1

Sales enablement

Arm the account teams with what success knows: account analyses, health, the expansion doors on the value curve. Key-account campaigns are built here, not in marketing.

SPRINT 2

Maturity modeling

Score every enterprise partnership on the six dimensions of the Partnership Maturity Model; chart it; compare it to its peer group. The joint scorecard the business review needs.

SPRINT 3

Engagements for adoption

Run the signal-driven motions — adoption workshops and success initiatives — against the accounts the maturity model and the health checks flagged.

The enterprise pipeline

ALL DEDICATED ACCOUNTS

Key-account analysis

One per account: value, health, maturity, the people, the plan.

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ALL DEDICATED ACCOUNTS

Health check

Thirty minutes with the customer. Triage: happy, escalated, unhappy.

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WHERE THE CHECK WARRANTS

Account plan

Evaluation and plan, with the expansion door named.

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SCHEDULED FROM THE PLAN

Business review

Prioritized high, medium, low; the strategic, proactive corner.

HAPPY

Keep the slope positive; schedule the review on the calendar.

ESCALATED

A success initiative now; the review when it is resolved, not before.

UNHAPPY

Executive involvement; the review becomes the plan to earn one.

For the shared and digital tiers, the same quarter is one motion: a thirty-minute health check for one hundred percent of the segment — make sure they know what they have, are set up for success, and can use the platform properly — with everything else triggered by what the checks find. Support's first-touch response time is the quarter's other number; when it fell from days to an hour, everything downstream got easier, because customers who are answered quickly tell you things.

The count you report to the board is not how many of these you did. It is how many of the dedicated accounts have a current analysis, a check, a plan and a review on the calendar — and what the three-way triage says about the book.

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