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The Success Initiative.

A play: when an account's problems pile up, Customer Success gathers everything open into one scoped, signed, time-boxed engagement and runs it to steady state in seven to thirty days. What it is, when to call one, how to open, run and close it, and the clock that keeps it honest. With the tracker.

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CONTROL

The play nobody wants to need.

The Business Review is the motion that grows an account. This is the one that keeps an account from leaving when its problems have piled past what the day-to-day can absorb. When I taught it in 2018, I ranked it plainly: the Business Review the highest-value motion, this one the lowest — and the one you can spend the most time on. Run it well, and you need fewer of them.

VERSION	DATE	AUTHORITY	NOTES
1.2	November 2026	Juan Carlos González II	Terms made one across the shelf: the middle step is *Analyze* — evaluate, analyze, synthesize — and Services is named as the function where this edition said Onboarding
1.1	November 2026	Juan Carlos González II	First public edition: the trigger, the one-page scope and the tracker generalized; opened with the Structured Call; the 1-3-7 standard as the clock for reactive items; a critical path, the close and the measures written out (new in this edition)
1.0	2017 – 2020	Juan Carlos González II	Run as the “Success Engagement” — internally the Heal Desk — in 2017 and 2018 at a hospitality-software company in the Vista Equity portfolio, where three or more open cases flagged it automatically; carried to a managed file transfer and network management software company in 2018; named “Success Initiatives” in the partnership framework of a financial services software company in 2020

HOW TO USE THIS PLAY

Read pages 4–5 once, for what it is and when to call one. Pages 6–9 are the play in order: open, run, keep the clock, close. Page 10 is who does what at each touch tier; page 11 is how you know the play is working, and the checklist. Then open the tracker: the Scope tab is the page the customer signs.

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WHAT A SUCCESS INITIATIVE IS

Defined.

A Success Initiative is a tactical intervention designed to confront opportunities and pursue challenges: Customer Success gathers everything open on an account — cases, projects, escalations — into one scoped, signed, time-boxed engagement, and runs it until the customer confirms every challenge identified is resolved.

Three things in that sentence carry the weight. **Everything open:** the customer does not experience our org chart. Five cases in three queues and a stalled project feel to them like one problem — that we are not handling it — and the initiative answers them as one. **Scoped, signed, time-boxed:** a page both sides sign, saying what is in, who does what, and by when; seven to thirty days, aimed at a state the customer can recognize. **The customer confirms:** it ends when they say so, not when our last case closes.

ON THE GRID

Tactical, proactive

Tactical, because it has a scope and an end. Proactive, because we make the offer before the customer asks for it: the signal may be reactive — a pile of cases, a health score turning Red — but the initiative is ours to propose. In 2018 the trigger read "a proactive offer of escalation assistance." It still does.

ON THE JOURNEY

Moment 23, milestone 09

On the Customer Journey it is moment 23 — "signals show operating challenges" to "the customer confirms every challenge identified is resolved" — touching milestone 09 of the Operating Model's twelve, success engagement. Success owns it; every other function is accountable for its part.

WHAT IT IS NOT

A bigger ticket

It is not escalating harder inside Support, and it is not an account review with a new name. Support resolves cases; the initiative resolves the account. Customer Success is not the problem-solver in it — it is the solution-facilitator, the one who knows who should solve each part and makes sure they do.

THE ONE SENTENCE

"Over the course of the next seven to thirty days, resolve to steady state." The 2018 play said it in those words, and every other page here is how.

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WHAT A SUCCESS INITIATIVE IS

When to call one.

Call one when the day-to-day can no longer carry the account alone. Any one of four triggers is enough; the first three come from signals, the fourth from the calendar.

TRIGGER ONE

Critical mass

Three or more open cases at once. In 2018 the system flagged it on its own and handed the account to its CSM. Set your number from your own case volumes; keep it low.

TRIGGER TWO

Operations turn Red

The Customer Health Score's operations component fails — cases aging, an invoice unpaid, a project slipping — and names this play.

TRIGGER THREE

An executive escalation

Someone senior on the customer's side, or ours, says the relationship is in trouble. Treat it as a signal, not a complaint to be calmed.

TRIGGER FOUR

Scheduled

We choose to: after a serious incident, ahead of a renewal with open issues, or when a cohort shares a problem worth fixing once.

Three kinds of exception

Whatever the trigger, the thing underneath is one of three exception events, and naming which one shapes the initiative. **Difficulty** — escalations from the day-to-day work. **Complexity** — changes in the scope, time or resources being delivered. **Ambiguity** — risks from unknowns that have entered the relationship. Difficulty wants a fix; complexity wants a renegotiated plan; ambiguity wants a conversation before either.

WHEN THE TROUBLE IS REALLY…	RUN INSTEAD	WHY
Usage decaying, nothing broken	The Adoption Workshop	A training and value problem, not an operating one.
One request about the product	The Feedback Cycle	A single problem with options; it needs no scope of work.
Legal action, or a lawyer named	Stop; refer to Finance	Every team ceases further communication — the journey's legal lane.
A healthy account, due for a review	The Business Review	Strategic and proactive: nothing to resolve, everything to align.

THE PLAY

Open: the call and the page.

An initiative opens with a conversation, then a signature. The conversation is a structured call — my standard for every difficult conversation, "anything that's risky, vague," or emotionally charged. The signature is one page.

1
SET THE STAGE

"The purpose of this meeting is to discuss ___. At the end of this call, we'll ___." Gain agreement on both before going further. Then role alignment: "As your CSM, it's my role to make sure you're getting business results. I manage our partnership, and it's my intention to get us all on the same page and lead us to a successful outcome."

2
PAST, THEN PRESENT

Recap the story so far, in facts: "Over the past twelve months, you opened ___ cases." Then ask for buy-in — "Do you see things the same way?" — and play it back: "What I hear you say is..." Only then the present: "Because of [the past], our current challenge is [this]." Gain agreement.

3
FUTURE, AND RECAP

Exchange needs: what do you need from us to be successful, and what do we need from you? Close on the recap — "We agreed the challenge is ___; we agreed on ___" — and offer the initiative. Follow up by email the same day, with the scope attached.

The page the customer signs

WHAT IS IN

Scope and time

Every open case, project and escalation in scope, listed. The state that ends it, in the customer's words. The time frame: seven to thirty days.

WHO DOES WHAT

Two named leads

One point of contact on each side, for prompt escalations and decisions. Resources and expectations of us, and of the customer. A weekly call.

THE AGREEMENT

Both sign

Both sides agree to take part through the named contacts, to escalate and delegate promptly, and to give feedback and approvals in an agreed time. Then both sign.

The tracker's Scope tab is that page, ready to print. A signature is not bureaucracy: it is the moment the customer stops waiting on us and starts working with us.

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THE PLAY

Run: evaluate, analyze, synthesize.

Three verbs, in order, for every item in scope. The goal of all three is the line from my 2018 lesson plan: get the ball back in the customer's court — a decision for them to make, with everything they need to make it.

EVALUATE

What is going on?

Determine the root cause, not the symptom. Read the cases together, not one at a time: five tickets are often one cause. Assign each item to the person who can actually resolve it — "who should I be working with to get resolution?"

ANALYZE

What is the impact to your business?

In the customer's terms: hours lost, revenue at risk, a team that stopped using the product. The impact sets the priority, and it is the sentence you will repeat in the close.

SYNTHESIZE

Here are the options

"Here are some options, but here's what we recommend you do, and why." Options give the customer control of the outcome; a recommendation gives them a reason to choose. Then the ball is in their court.

The tracker

One row per item, one owner on each side, and a condition anyone can read from across the room. The disposition column is the initiative's memory: dated entries, newest first, saying what changed and what happens next.

NO.	ITEM	PRIORITY	CONDITION	CUSTOMER OWNER	OUR OWNER	DISPOSITION
1	Data sync failing nightly	High	Red	Their IT lead	Support	Oct 14 — Root cause found in the connector; fix scheduled Oct 16, Support to confirm by noon Oct 17.
2	Reporting project stalled	Med	Yellow	Operations director	Services	Oct 13 — Downgraded to Yellow: one-week delay. Will move to Green on the customer's sign-off.
3	Invoice disputed	Med	Green	Their controller	Finance	Oct 12 — Credit agreed and issued; customer confirmed. Closed.

EVERY WEEK

One call

The two leads walk the tracker, red items first. Nothing is discussed that is not on it; anything new is added before the call ends.

EVERY CHANGE

A dated line

A color never changes without a disposition saying why. A color moves to Green only when the customer agrees it should.

EVERY OWNER

Accountable

The functional owner resolves the item. Success holds them to it, and is the final point of escalation for all of them.

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THE PLAY

The clock: 1-3-7, and the critical path.

The initiative is proactive, but the items inside it are mostly reactive — things the customer raised and is waiting on. Every one of them runs on the standard I hold every client-facing team to, wherever a customer is waiting on us.

THE 1-3-7 STANDARD

ONE

The same day

Acknowledge the request. Call; if you reach voicemail, call back; then email a recap. Say when you will respond with next steps — a date, not "soon."

THREE

Within three days

A touchpoint that consolidates the feedback and makes it actionable: define the problem, recommend the solution, give the timeline. Then call to confirm they received it and accept it.

SEVEN

Within seven days

A major update, or the complete resolution or action plan. Where the real fix takes longer, the workaround and the options are delivered inside the seven days.

Log every touch where the whole company can see it. The tracker carries the three dates for every reactive item — acknowledged, plan delivered, resolved or updated — and counts how often each was met. That count is the first measure of the play.

The critical path · NEW IN THIS EDITION

1-3-7 is for most escalations. A critical one — the customer cannot operate, data is at risk, or business has stopped — needs an immediate plan of action, and its own clock:

WHEN	WHAT HAPPENS	WHO
Within the hour	Acknowledged by a person, by phone. One named lead on each side. The customer is told when the next update comes.	Success, with Support
The same day	A plan of action in writing: what is known, what is being done, the workaround if there is one. Executive sponsors on both sides informed.	Success
Every day after	An update at the promised time, even when there is nothing new — especially then — until the customer is operating again.	Success
Once stable	A written account of what happened, why, and what changes; then a Success Initiative for the aftermath, scoped like any other.	Success, with Product

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THE PLAY

Close: the customer says so.

An initiative is done when the customer confirms resolution of every challenge identified — not when our last case closes. The close is a conversation, a signature like the one that opened it, and a watch.

1
CONFIRM

Walk the tracker one last time with the customer's lead, item by item. Every row Green, every Green agreed. Ask the question plainly: are we back to normal? The answer goes in writing, on the Close tab, dated and named.

2
RECAP

A short structured call: what we agreed the challenge was, what was done, what changes so it does not recur. Say the impact sentence from the analysis back to them, resolved. Then hand the account back to the touch its tier earns.

3
WATCH

Thirty days after the close, read the account's health. Green, and the initiative is finished. A recurrence within ninety days reopens it — and counts against the play, because the root cause was not found.

When it will not close

PAST THIRTY DAYS

Never extend in silence

Hold a structured call to re-scope with the customer, and take it to the executive sponsors on both sides. For a dedicated account, the initiative can become a Business Review.

A PRODUCT DEFECT

Within reason

A fix that needs a release can take longer. The initiative closes on an agreed workaround and a dated commitment; the defect moves to the Feedback Cycle.

THE CUSTOMER SAYS NO

Telling them no

Some requests should be declined — not because no is the most service-oriented response, but because it is the most success-oriented one. Say it in a structured call, and agree what happens instead.

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RUNNING IT

Who does what, at every tier.

Success convenes; every other function is accountable for its part. In 2018 the journey wrote it exactly that way: Success facilitates the cross-functional initiative; every other team is the stakeholder engaged, varying by situation.

FUNCTION	CODE	ITS PART IN THE INITIATIVE
Customer Success	R	Proposes it, writes the scope, runs the calls and the tracker, holds every owner to the clock, and is the final point of escalation.
Support	A	Resolves the cases in scope, to the 1-3-7 dates on the tracker; owns the critical path's technical response.
Services	A	Restarts and finishes stalled projects; owns any rework of the configuration.
Product	A	Diagnoses defects, commits dates for fixes, and takes the long-term items into the Feedback Cycle.
Finance · Sales · Marketing · Partners	A	Credits and billing; the commercial conversation if terms change; customer communication after incidents; the partner's part where a partner is in the middle.

The same play, at three tiers

DEDICATED

An executive engagement

The full play, with a weekly call between named leads and the executive sponsors informed at open and close. It "could also become an overall business review" — and often should.

SHARED

Scoped and steady

The same page and tracker, a shorter scope, and the weekly call held to thirty minutes. Don't reinvent the wheel: most shared-tier initiatives are a known fix applied with discipline.

DIGITAL

From afar

Open one consolidated case for the account and review it from afar: the items gathered, one owner, the 1-3-7 dates kept, the customer told by email what is in scope and when it closes.

Touch is the customer's attribute, not the play's. The play is the same at every tier — open, run, keep the clock, close — and only the channel and the weight change.

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RUNNING IT

Is it working, and the checklist.

The best measure of this play is that it is needed less: effectiveness shows up as fewer exception events. Four measures say whether each one worked, and the tracker's Book tab counts them. NEW IN THIS EDITION

THE CLOCK

1-3-7 kept

The share of reactive items acknowledged the same day, planned within three, and updated or resolved within seven.

THE PACE

Days to steady state

From the signed scope to the customer's confirmation. Thirty is the ceiling, not the target.

THE CURE

No recurrence

The share of closed initiatives not reopened within ninety days. A recurrence means the root cause was missed.

THE RESULT

Health after

The share of accounts Green thirty days after the close — and, over a year, how many of them renewed.

OPEN

- [ ] A trigger named, and the kind of exception
- [ ] The right play? Not adoption, not one request
- [ ] A structured call: past, present, future, recap
- [ ] Everything open listed in scope
- [ ] Two named leads; a weekly call
- [ ] The scope signed by both sides

RUN

- [ ] Root cause, not symptoms, for every item
- [ ] Impact stated in the customer's terms
- [ ] Options and a recommendation, every time
- [ ] 1-3-7 dates on every reactive item
- [ ] No color change without a dated disposition

CLOSE

- [ ] Every item Green, and every Green agreed
- [ ] The customer's confirmation, in writing
- [ ] A recap call, and the hand-back to tier
- [ ] Health read thirty days later
- [ ] Recurrence watched for ninety

EVERY QUARTER

- [ ] The four measures read for the book
- [ ] The three most common root causes taken to their owners
- [ ] One trigger threshold argued with

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