



Customer Success Coverage & Engagement Playbook

Customer Success ensures customers realize measurable value from our platform, resulting in long-term partnerships, revenue growth, and strong customer advocacy.

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CUSTOMER SUCCESS COVERAGE & ENGAGEMENT PLAYBOOK

Purpose

This document defines:

- Customer segmentation and tiering rules
- CSM assignment criteria
- Engagement models (Dedicated, Hybrid, Tech-touch)
- Overall process Information

This playbook ensures:

- Revenue is protected according to risk and value
- CSM capacity is preserved
- Engagement is structured and scalable
- Expansion opportunities are surfaced intentionally

Guiding Principles

A customer receives a dedicated CSM if they:

1. Represent our highest priority enterprise, strategic key accounts.
2. Represent meaningful revenue risk or expansion opportunity
3. Hold a Premier Support Agreement
4. Require consultative engagement to realize value
5. Have product complexity or stakeholder depth that justifies high-touch
6. Cannot scale effectively through tech-touch alone

If a customer does not meet threshold criteria, they enter Hybrid (pooled CSM) or Tech-Touch.

1. Coverage follows revenue and complexity.
2. Not all customers require a dedicated CSM.
3. Automation is the default; human engagement is intentional.
4. Engagement intensity increases with ARR and complexity.
5. Capacity protection is mandatory.
6. Segmentation is reviewed quarterly.
7. Red accounts receive attention before green accounts.

Customer Success Value Model

Customer Success drives measurable business outcomes in these areas:

Value Driver	Business Impact
Adoption	Accelerates time-to-value and drives product utilization
Retention	Protects recurring revenue and reduces churn
Expansion	Increases ARR and net revenue retention
Advocacy	Accelerates new sales and strengthens brand credibility
Voice of Customer	Improves product strategy and customer experience
Relationship Management	Drives retention, reduces risk, and enables growth

CSM Revenue Influence Model

MOTION	OWNER	CSM ROLE
New Logo Sales	Sales	None
Expansion	Sales	Opportunity identification
Renewal	CSM	Relationship + value proof
Retention	CSM + all Bold	Risk mitigation

CUSTOMER TIER ENGAGEMENT MODEL

Primary Qualification Criteria

	Description	Criteria	CSM
Tier 0 – Premier Support Agreement	Customer with purchased Support Agreement	<ul style="list-style-type: none"> • Must have Premier Support Agreement (PSA) • PSA supersedes ARR qualifications 	Assigned CSM
Tier 1 – Key Strategic Account	<p>Highest-priority enterprise accounts that drive brand reputation, influence market perception, and/or represent the largest revenue opportunities.</p> <p>Large accounts with significant ARR and expansion potential; may not be marquee names but are critical to revenue goals.</p>	<ul style="list-style-type: none"> • Total ARR: \$150k+ • Total Revenue: \$1M+ annual revenue or top 1% by revenue • Expansion Potential: Multiple cross-sell/up-sell opportunities. • Industry Stature: national/global leader, top 1-2% in the vertical. Recognized leader regionally/nationally. • Referenceable Account: Actively participates in case studies, events, VOC. • Partner Influence: Drives indirect revenue through reseller/integrator ecosystem. • High Strategic Fit with long-term product vision. 	Assigned CSM
Tier 2 - Mid-Market Growth	Solid accounts with steady ARR and reasonable upsell potential; typically require less intensive white-glove service but still benefit from proactive account management.	<ul style="list-style-type: none"> • Total ARR: \$25k – \$149k • Limited cross-sell opportunities. • Industry Stature: Well-known in niche markets. • Reference Potential: Passive or infrequent. 	Pooled CSM
Tier 3 - SMB	Smallest ARR accounts, often transactional or high-velocity sales. Focus is on scalable support and automation.	<ul style="list-style-type: none"> • Total ARR: <\$25,000 • Minimal expansion potential. • Local/regional presence. • Reference Potential: Unlikely. 	Tech Touch

Tiering Information

Segment	ARR	Engagement Model	Coverage	Outreach
Tier 0	Premier Support Agreement	High-touch	Dedicated CSM	Monthly/Weekly ops call, QBR, Exec sponsor outreach
Tier 1	\$150k+ ARR	High-touch	Dedicated CSM	Bi-monthly ops call, QBR, Exec sponsor outreach 2x/yr
Tier 2	\$25k-\$149k ARR	Hybrid	Pooled CSM	Trigger based engagement
Tier 3	<\$25k ARR	Tech-touch	Support + automated programs	Automated programs

Tier 0: Premier Support Agreement - Assigned CSM (High Touch)

Objective

Honor and execute expectations set in Premier Support Agreement.

Qualification Criteria

Default:

- Premier Support Agreement

Automatic Escalation Triggers:

- Custom Projects
- Active integration
- Cloud migration
- Multi-site deployment
- Strategic reference logo
- Expansion opportunity > \$25K
- Executive escalation

Engagement Model

- Pod Model: CSM and Acct Manager team
- Onboarding: Success Plan + mutual outcomes + go-live milestones
- Cadence: Monthly ops call + Quarterly QBR + exec sponsor touch quarterly
- Renewal: Start at 180 days; value proof + roadmap alignment

NOTE: Managely or AlarmBiller customers will not have a dedicated CSM.

Tier 1: Assigned CSM (High Touch)

Objective

Protect and grow high-value, complex, or key strategic accounts.

Qualification Criteria

Default:

- ARR ≥ \$150,000

Automatic Escalation Triggers:

- Active integration
- Cloud migration
- Multi-site deployment
- Strategic reference logo
- Expansion opportunity > \$25K
- Executive escalation

Engagement Model

- Onboarding: Success Plan + mutual outcomes + go-live milestones
- Cadence: Bi-monthly ops call + Quarterly QBR + exec sponsor touch 2x/year
- Renewal: Start at 180 days; value proof + roadmap alignment

NOTE: Managely or AlarmBiller customers will not have a dedicated CSM.

Tier 2: Hybrid (Pooled CSM Model)

Objective

Drive adoption and protect retention efficiently at scale.

Qualification Criteria

- ARR between \$25,000–\$149,000

Engagement Model

- Onboarding: Standard customer path
- Projects: If need requires a CSM, serve as a Project CSM for a period of time.
- Cadence: Trigger-based only (risk/usage drop/expansion intent)
- Renewal: Start at 120 days; adoption + commercial check-in

Tier 2 will not have a dedicated CSM.

Tier 3: Tech-Touch

Objective

Deliver scalable lifecycle engagement without 1:1 CSM coverage.

Qualification Criteria

- ARR < \$25,000
- No complexity indicators
- Standard implementation

Engagement Model

- Onboarding: Standard customer path
- Cadence: Trigger-based only (risk/usage drop/expansion intent)
- Renewal: Automated reminders + “renewal assist” path

Managed by automation + marketing operations.

CSM Assignments

For a complete list of CSMs to customers, see this [article](#).

CSM RESPONSIBILITIES

Customer Lifecycle Engagement

Stage	Owner	CSM Involvement
Sales Cycle	Sales	None
Implementation	Implementation / PM	CSM onboarding for all customers. Dedicated CSM introduced for key strategic accounts.
Go-Live	Implementation → Support	CSM engagement for Tier 0 & Tier 1
Adoption	CSM	Success planning for Tier 0 & Tier 1
Renewal	CSM	Renewal preparation and execution
Expansion	Sales + CSM	CSM identifies opportunities

Onboarding Program – Net New/Migrations

The CSM will:

- ✓ Coordinate an internal call with the PM, CSM, and Sales
- ✓ Coordinate a pre-kickoff call with the customer – intro PM, review onboarding guides and facilitate the collection of one-time fees

Additionally, the CSM will:

- Join the implementation kickoff call
- Be a conduit for the project manager, if needed, during implementation
- Set up customer on Support Portal
- Set up customer in BoldU
- For Tier 0/1 customers, create Success Plans

All onboarding guides can be found [here](#).

To see the entire post-sale process, click [here](#).

NOTE: These are internal links. The onboarding guides are in each KB under the “Start Here” category.

Case Involvement

Status Updates for Cases in Development

For customers with an assigned CSM:

- All cases will be reviewed with the customer on an ongoing basis to include updates or requests for updated prioritization.

Status Updates for Cases in Product Management

Product will own responding to product feature requests.

Escalation of Case in Development or Product Management

- All customers will go through standard workflow through Triage process.
- To escalate, cases will be discussed in a bi-weekly prioritization meeting for prioritization with Product.

Renewal Management

CSMs are responsible for monitoring renewals for all customers.

See [this article](#) for the full renewal process the CSM team follows.

As a guiding principle, the team will monitor renewals starting at 120 days prior to renewal.

180 Days Out	120 Days Out	90 Days	60 Days	30 Days
<ul style="list-style-type: none">• Tier 0 & Tier 1• Health review• Value summary sent	<ul style="list-style-type: none">• Health review• Value summary sent	<ul style="list-style-type: none">• Risk classification	<ul style="list-style-type: none">• Procurement alignment	<ul style="list-style-type: none">• Final confirmation

Retention

Churn Risk Process

- Step 1 — Risk identified
- Step 2 — Root cause analysis
- Step 3 — Save plan created
- Step 4 — Leadership escalation if needed

Weekly cadence with customers to occur – either high touch or tech touch.

Risk Indicators

Category	Indicators
Product Usage*	Low logins, declining usage
Support	Repeated unresolved issues
Sentiment	Negative feedback or escalations
Commercial	Budget pressure or pricing concerns
Engagement	Stakeholders disengaged

*If the product supports analytic insights.

Expansion

CSM Responsibilities

- Identify expansion signals
- Document in Salesforce
- Notify Account Manager
- Participate in expansion discovery

Sales Responsibilities

- Commercial negotiation
- Proposal creation
- Close expansion

Cancellations & Credit Requests

CSMs will work with the internal teams on the intake process for credits and cancellations for all customers.

This includes communicating with the customer, conducting exit interview, contract verification, case to SalesOps to generate S&R, work with customer to sign S&R.

(Coming soon! Insert link to KB process CSMs follow)

Voice of Customer Program

Coming in 2026!

Once developed, CSMs will play a pivotal role in VOC initiatives including:

- NPS
- Customer or Product Advisory Boards
- Beta Programs
- Product Roadmap Influence

HOW TO ENGAGE WITH THE CSM TEAM

Engaging with the CSM team is easy! Just use the CSM queue.

For the entire engagement process, [see this article](#).

CSM Queue Clarification:

A CSM case is required for items that need follow-up or CSM engagement and should be created when:

- Customer relationships are at risk
- Executive contact / escalation required
- Strategic Account Escalation – Tier 0/1 w/ dedicated CSM
- Cross-team coordination needed

Additional categories below require a case to the CSM queue.

When to Use the CSM Queue

Engagement Type	Applies To	Notes / Clarification
Cancellation requests/exit interviews	All Accounts	CSM will fact-find and document before passing to SalesOps; provide guidance on credits; attempts to save account should be made. CSM will do S&R.
Escalation to facilitate customer communications	All Accounts	When internal teams cannot reach the customer or facilitate owning the customer, communications and engagement is needed.
Beta coordination for product enhancements	All Accounts	Applies to existing products and new features. Limited to key accounts.
Invoice Explanation	All Accounts	CSM will work with the customer on explaining their invoice.
CSM needed on a temp basis	All Accounts	All requests should flow through the governance meeting. Potential criteria for consideration should be if non-assigned CSM is churn risk, executive escalation, or other criteria as decided.
Audit of Cases	All Accounts	Escalate to a CSM if this is requested only after efforts to explain have been exhausted.
Churn Risk	All Accounts	CSM team will monitor customer health through renewals.
Executive Contact Required	All Accounts	Escalate via case to the CSM queue.
Collections / AR support	Key Accounts	Includes outreach (post closed/won status) to confirm payment status; facilitate customer communications on behalf of AR & Collections.
Escalations on critical customer cases	Key Accounts	Use to increase visibility or provide coordinated communication updates.
Cross-department call coordination	Key Accounts	For important customer calls requiring multiple teams.
Retention support/Churn Risk	Key Accounts	Only when a CSM is assigned, focus on accounts at risk of churn.

CSM Escalation & Engagement Matrix

Below are definitions of CSM involvement in case escalations based on severity.

Severity	Definition	Example Scenarios	Internal Response	CSM Involvement
Critical	Complete service outage or critical functionality unavailable with no workaround	System outage, login failures for all users, data corruption, security incident	Immediate triage, engineering engaged, internal SLA - updates every 1-2 hours to customer	Required for all strategic / named CSM accounts (Tier 0 & 1)
High	Major functionality degraded but workaround exists	Key workflow broken, performance issues, multiple users impacted	Prioritized investigation, daily updates to the customer	CSM engaged if strategic account, renewal <90 days, or customer escalates
Moderate	Limited business impact or isolated issue	Single-user issue, configuration issue, non-core feature broken	Standard support SLA	CSM only if pattern of issues or continued customer dissatisfaction
Low	Informational requests or minor issues	“How-to” questions, documentation clarification, feature requests	Normal queue handling	No CSM involvement required

Automatic CSM Escalation Triggers

Regardless of case severity, CSM should be engaged if any of the following occur:

- Customer has a dedicated CSM
- Strategic / enterprise account – Tier 0 or Tier 1
- Renewal within 90 days
- Executive stakeholder escalation
- 3+ open support cases within 30 days with status update need
- Repeated unresolved issue
- Customer expresses churn risk
- Sales flags account for risk

Escalation Workflow

Step 1 – Customer submits case

- Support triages and assigns severity.

Step 2 – Issue investigation

- Support works case or escalates to Product or Development.

Step 3 – Escalation triggers evaluated

- If triggers met → **CSM added to case**

Step 4 – Customer communication

- Support provides technical updates. See all of Support's [scope here](#).
- CSM manages customer expectations for key accounts with a dedicated CSM.
 - Escalation coordination, relationship concerns, executive escalation

Step 5 – Leadership escalation (if needed)

- Support Manager → CS Leadership → Executive team.

FOR CSM TEAM ONLY

Health Scoring Framework

Weighted Model:

- Usage: 40%
- License Utilization: 15%
- Feature Adoption: 15%
- Engagement: 10%
- Support Trends: 10%
- Survey/NPS: 10%
- NOTE: Weighting will be adjusted in the future based off Salesforce data.

Score Bands:

- Green: 80–100 = Healthy → No proactive outreach
- Yellow: 60–79 = At Risk → CSM check-in required
- Red: <60 = Critical → Account Recovery Plan

Only Yellow/Red receive proactive outreach.

Governance & Review Cadence

Director of Customer Success owns governance of CSM playbook and leading CSM team in review.

Monthly	Quarterly
<ul style="list-style-type: none">• Red account review• Renewal pipeline review• Capacity review	<ul style="list-style-type: none">• Re-tier accounts• Audit overrides• Assess graduation candidates• Headcount planning review

Success Plans

Success Plan Components

1. Customer business goals
2. Product use cases
3. Adoption milestones
4. Success metrics
5. Risks
6. Expansion opportunities

See Success Plan template in CSM Sharepoint.

QBR Framework

QBRs are held with Tier 0 and Tier 1 customers. Include Account Manager in the QBR. Encourage Executive presence to support partnership.

QBR Agenda

1. Business objectives review
2. Product usage review
3. Value delivered
4. Roadmap preview
5. Expansion opportunities
6. Risks / action items

See QBR template in CSM Sharepoint.

CSM Capacity Model

To be developed in Q3 after re-assessment of Q2 results/bandwidth.

Reporting

Link to dashboards once built.

- Revenue Metrics – GRR, NRR, Churn Rate
- TTV
- NPS
- CSAT
- Escalations
- CSM Capacity by Tier
- QBR coverage, Success Plan coverage
- Renewals