CUSTOMER

SUCCESS

TRENDS

'24

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Executive Summary

There's no bigger challenge or opportunity for CS teams in 2024 than defining, delivering and measuring customer outcomes. Every program, system and process must be geared towards driving customers towards their desired results. That's how we scale and drive NRR and GRR sustainably.

Delivering Value for Customers

Today, the Customer Success organisation in SaaS companies are clear on the value that it delivers to the business, with 93.7% of the surveyed companies measuring the impact of Customer Success using a revenue target (GRR, NRR or both).

Unfortunately, the understanding of the value that companies deliver to customers is less developed. CS teams of every size cited 'Delivering Value for Customers' as a top challenge, and hope to invest in 'Defining Customer Outcomes' in 2024.

The processes that CS leaders are prioritising also reflect the need to deliver value for customers. Customer Journey Maps and new and revamped high-touch CS Playbooks. Programs such as Success Plans, EBRs and Onboarding continue to be a priority for CS organisations of every size.

Scaling Customer Success

Still facing economic uncertainty in 2024, CS leaders are thinking creatively about how they can break linear growth. Scaling Customer Success ranked as the second biggest challenge for CS teams in 2024, cited by 58.4% of the companies. The data demonstrates that the larger the company, the bigger the need to scale, with Enterprises ranking it as the top priority for next year.

CS Teams of every size are doubling down on Customer Success Platforms and Automation to support scaling next year. However, most companies won't be prioritising emerging technologies such as ML and AI in 2024. Self-service resources are a key investment.

An opportunity that emerged specifically in larger organisations is the alignment of the Go-To-Market teams, with Corporate firms and Enterprises ranking it as a top process improvement required in 2024.

Methodology

An evidence-based approach was used to ensure that the information presented was accurate and reliable.

Data collection methods

This annual report presents insights and findings derived from a comprehensive data collection effort undertaken through anonymous surveys conducted via Google Forms. The survey ran for a full month (November 2023) and received a total of 604 unique responses.

This methodology was used with the aim of gathering candid and uninhibited feedback from a diverse range of stakeholders.

Participants & Limitations

Participants were drawn from a diverse pool, of Customer Success leaders worldwide. A range of managerial levels in companies of varying sizes are included in the research. Any individual contributor responses have been removed.

While the survey provided invaluable insights, it's important to acknowledge its limitations. The findings are based on self-reported data and may be subject to inherent biases or limitations associated with survey-based research.

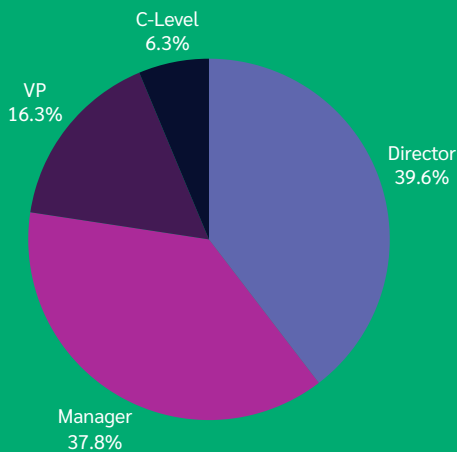| #	Questions
1.	What's your title?
2.	What's your Company Size?
3.	What's your company's Business Model?
4.	What's your North Star Metric of Success?
5.	What challenges are you trying to solve in 2024?
6.	What system improvements are you hoping to focus on for 2024?
7.	What process improvements are you hoping to invest on in 2024?
8.	What programs are you investing on in 2024?

'24 CS Trends Overview

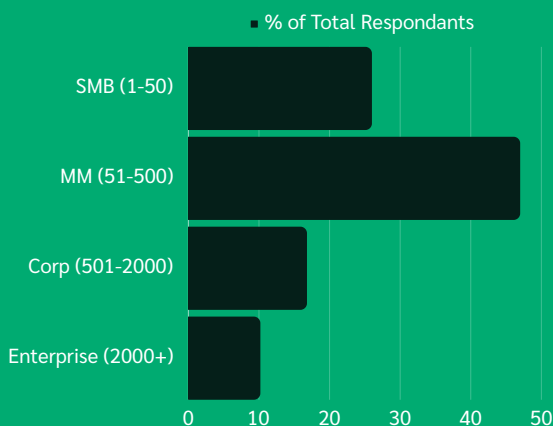Dive deeper into a comprehensive overview of the prevailing trends that define Customer Success strategies in 2024.

Participants Titles

62.2% of the respondents have direct control over their department's strategy.

C-Level
6.3%

VP
16.3%

Director
39.6%

Manager
37.8%

Company Size

Over 86% of the respondents are companies in the SaaS industry.

■ % of Total Respondants

SMB (1-50)

MM (51-500)

Corp (501-2000)

Enterprise (2000+)

0   10   20   30   40   50

Commercial Responsibilities

Of the surveyed companies, 93.7% measure the impact of Customer Success using a revenue target (GRR, NRR or both). This finding demonstrates the prevalence of commercial responsibility in SaaS Customer Success in 2023.

The challenges and investments that CS leaders reported as priorities for 2024 — highlighted through the next pages of this report — connect deeply with the need to better retain and grow customers in 2024.

Other less-mentioned metrics of success were related to adoption, engagement and satisfaction.

North Star Metrics Of Success

Other
6.3%

NRR, GRR
10.5%

GRR
13.1%

NRR
67.7%

What challenges are CS leaders trying to solve in 2024?

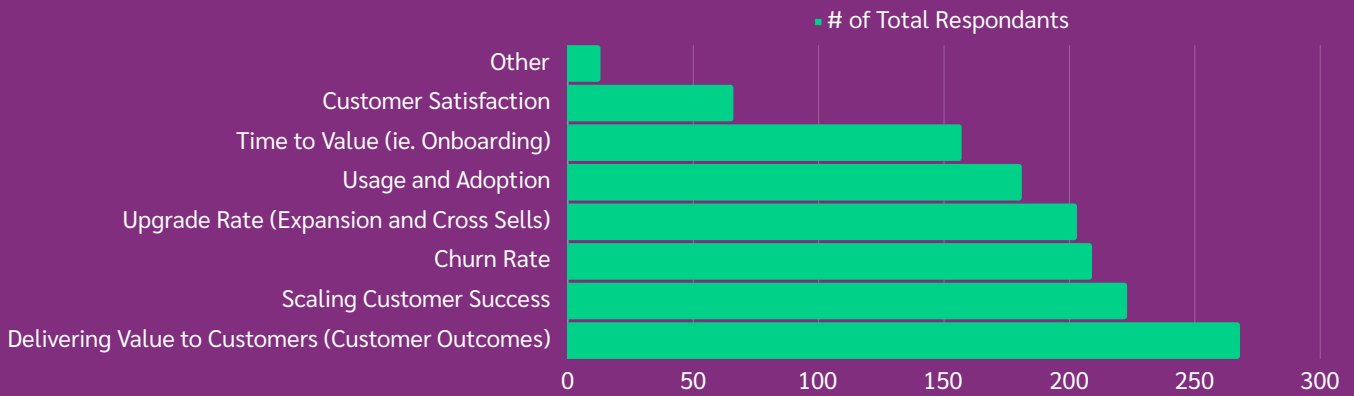■ # of Total Respondants

Challenge	Approx. value
Other	~12
Customer Satisfaction	~65
Time to Value (ie. Onboarding)	~157
Usage and Adoption	~180
Upgrade Rate (Expansion and Cross Sells)	~203
Churn Rate	~208
Scaling Customer Success	~222
Delivering Value to Customers (Customer Outcomes)	~267

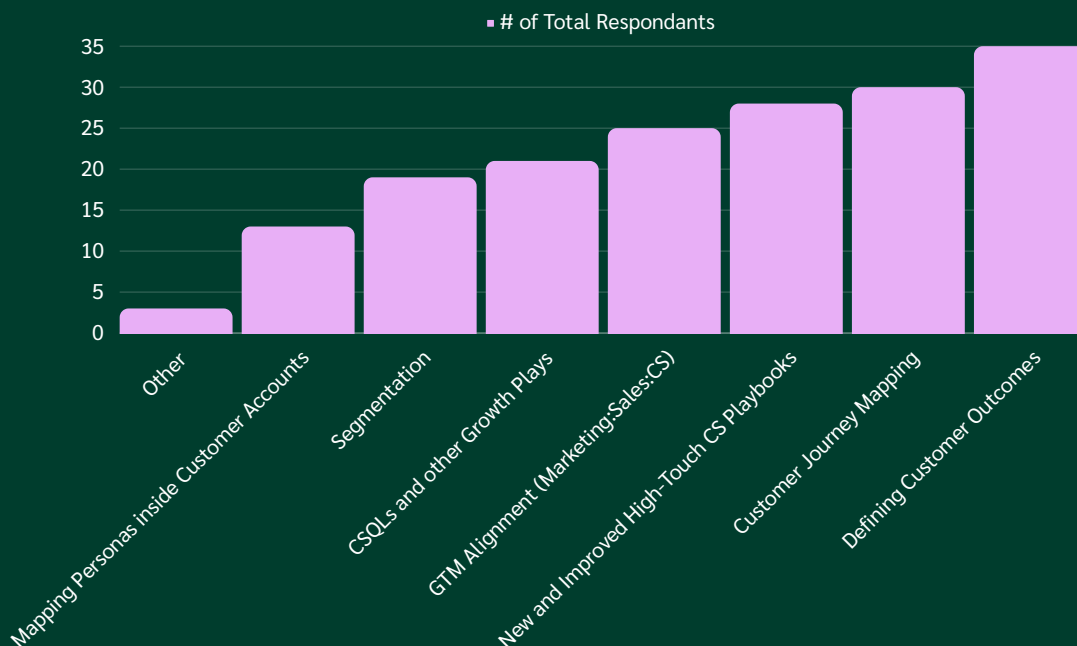*(Horizontal axis: 0, 50, 100, 150, 200, 250, 300)*
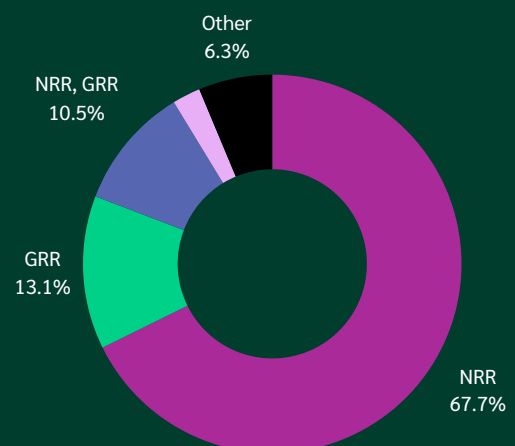
The top challenge CS leaders want to tackle in 2024 is 'Delivering Value to Customers', highlighting a gap that most organisations have in their understanding and ability to deliver and measure customer outcomes. Thus, on top of a difficult macro-environment, it's unsurprising that Churn and Growth also rank highly as challenges.

Scaling Customer Success comes as the second most important challenge for CS leaders in 2024. With heightened economic pressure in 2023, more CS organisations are hoping to break linear growth and operate more efficiently.

What process improvements are leaders hoping to tackle in 2024?

2024 is set to be the year of customer-centricity. To tackle the main challenges outlined above, CS leaders are hoping to invest in defining customer outcomes, mapping the customer journey and making improvements to existing high-touch CS playbooks.

■ # of Total Respondants

Process Improvement	Approx. value
Other	~3
Mapping Personas inside Customer Accounts	~13
Segmentation	~19
CSQLs and other Growth Plays	~21
GTM Alignment (Marketing:Sales:CS)	~25
New and Improved High-Touch CS Playbooks	~28
Customer Journey Mapping	~30
Defining Customer Outcomes	~35

(Vertical axis: 0, 5, 10, 15, 20, 25, 30, 35)

What system improvements are CS leaders prioritising in 2024?

In line with the core challenge of Scaling Customer Success, leaders have reported investments in automation and CS platf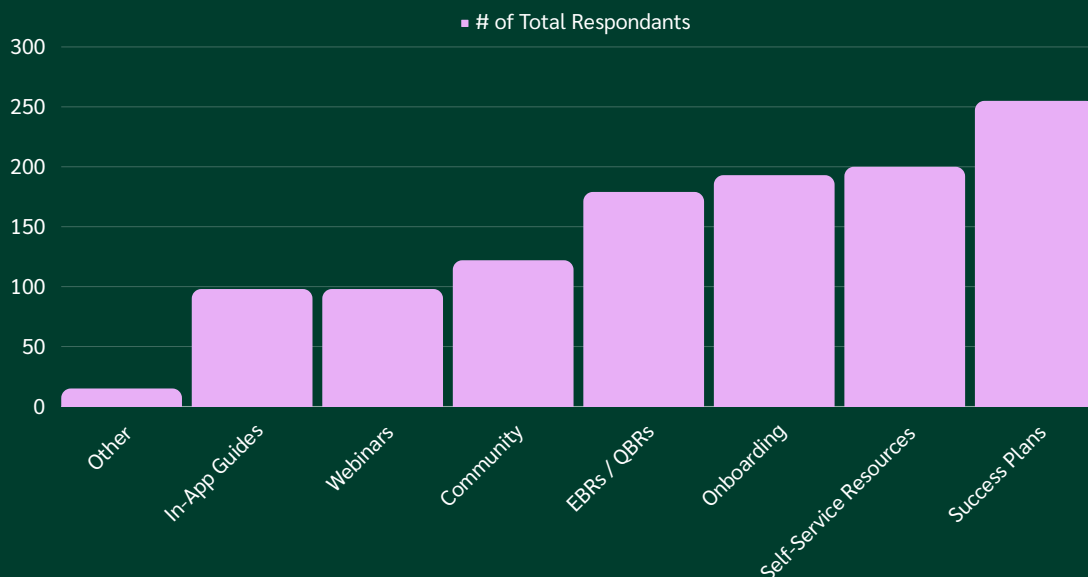orms as the top system priorities for 2024. The more innovative tools for scaling such as Machine Learning and AI rank lower in the priority list of most of the respondents, indicating that they are still seen as low impact.

■ % of Total Respondants

Categories (top to bottom): Call Intelligence, Machine Learning and AI, Integrating Go To Market Systems (ie. CRM, Data Integrity, Forecasting, Reporting, CS Platform, Automation
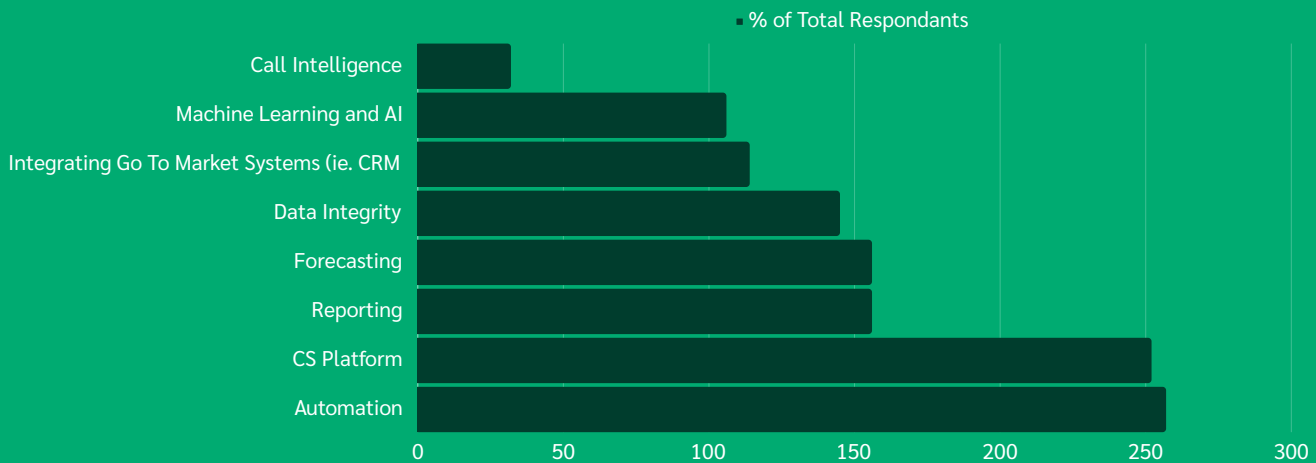
What program investments will CS Leaders make in 2024?

Success Plans ranked as the highest CS program investment for 2024, demonstrating leaders recognise the need to go beyond the definition of customer outcomes and collaborate on a shared plan in order to drive value for customers.

Many are prioritising scale plays in their 2024 investments. This survey gathered 518 mentions of scale Customer Success programs such as Self-Service Resources, Community, Webinars and In-App Guides.

■ # of Total Respondants

Categories: Other, In-App Guides, Webinars, Community, EBRs / QBRs, Onboarding, Self-Service Resources, Success Plans

Small Business Deep Dive

NRR, GRR
6.3%

GRR
13.5%

NRR
74.9%
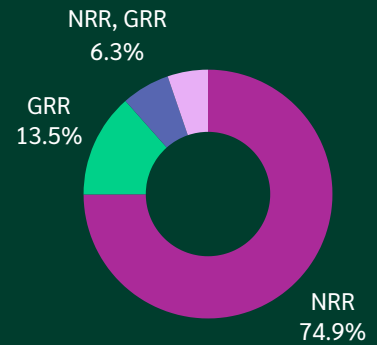
What challenges are CS leaders trying to solve in 2024?
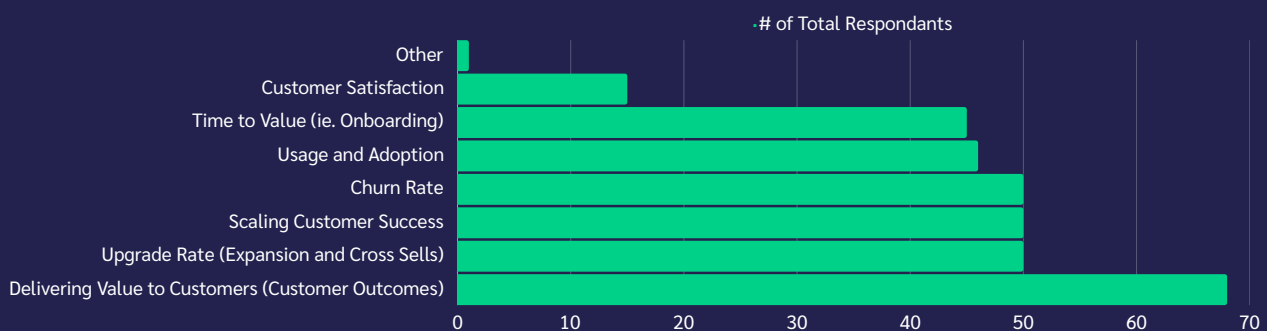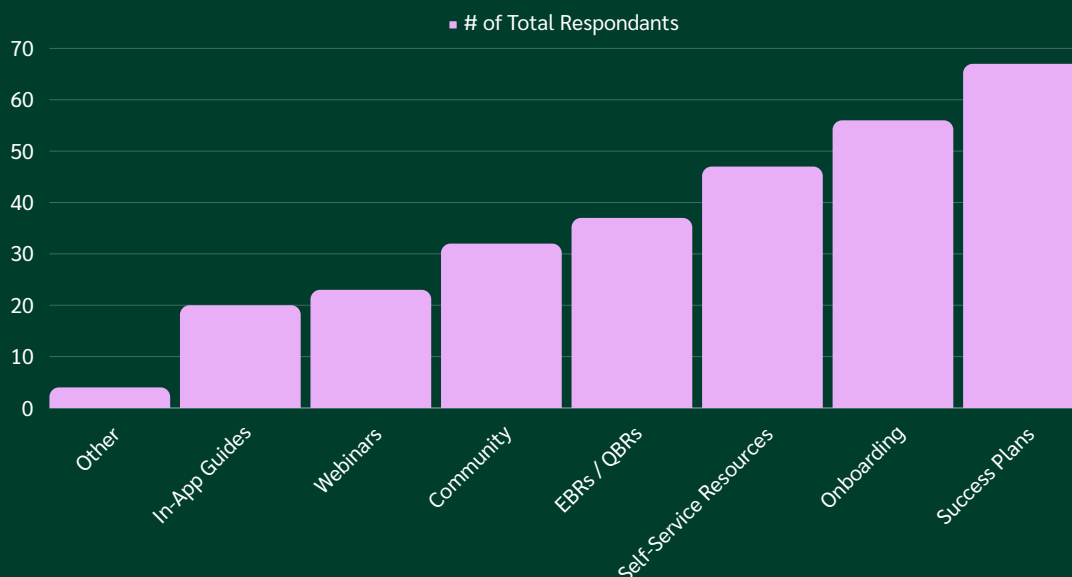
SMBs are facing bigger challenges with expansion of customers than other companies.

# of Total Respondants

Category	Value
Other	~1
Customer Satisfaction	~15
Time to Value (ie. Onboarding)	~45
Usage and Adoption	~46
Churn Rate	~50
Scaling Customer Success	~50
Upgrade Rate (Expansion and Cross Sells)	~50
Delivering Value to Customers (Customer Outcomes)	~68

(x-axis: 0, 10, 20, 30, 40, 50, 60, 70)

What programs investments will CS Leaders make in 2024?

SMBs hope to have a fast start with customers by investing in programs that help set customers up for success from day one such as Success Plans and Onboarding.

# of Total Respondants

Category	Value
Other	~3
In-App Guides	~20
Webinars	~23
Community	~32
EBRs / QBRs	~36
Self-Service Resources	~47
Onboarding	~56
Success Plans	~67

(y-axis: 0, 10, 20, 30, 40, 50, 60, 70)

What system improvements are CS leaders prioritising in 2024?

While also investing in CS Platforms and Automation, SMBs highlight a bigger need to invest in forecasting technologies than other companies.

■ # of Total Respondants

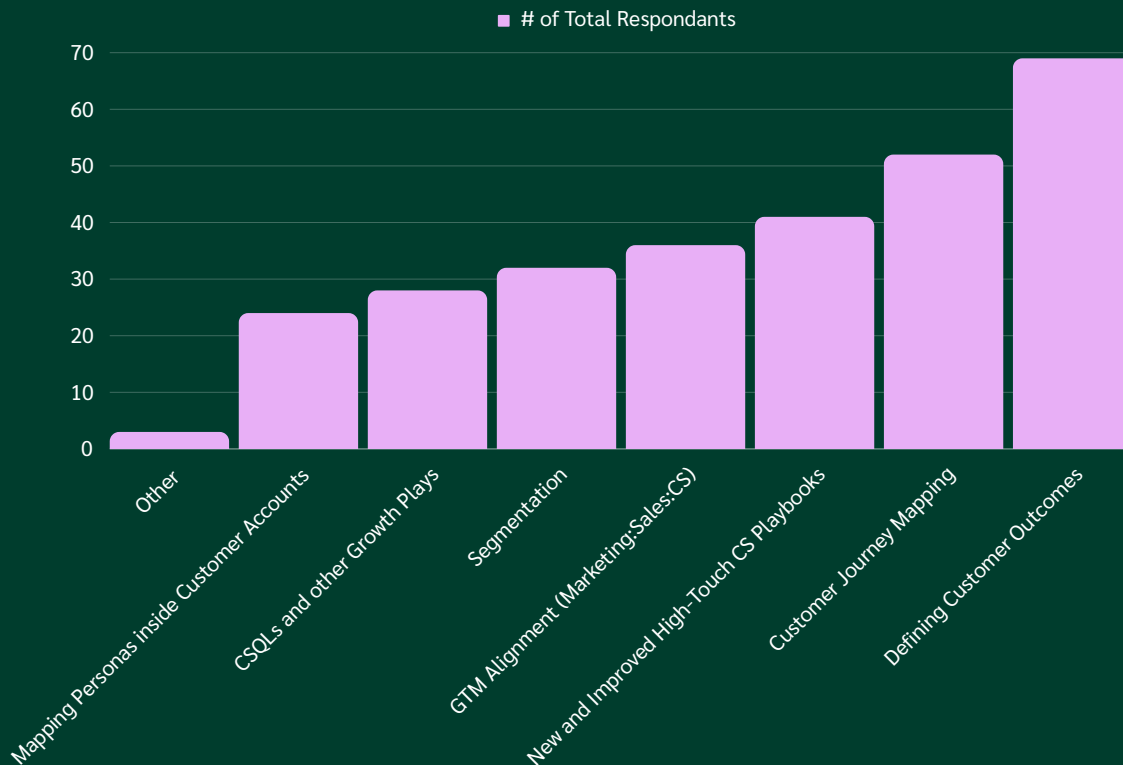| Category	Value
Other	
Call Intelligence	
Integrating Go To Market Systems (ie. CRM	
Machine Learning and AI	
Data Integrity	
Reporting	
Forecasting	
CS Platform	
Automation	

0   10   20   30   40   50   60   70
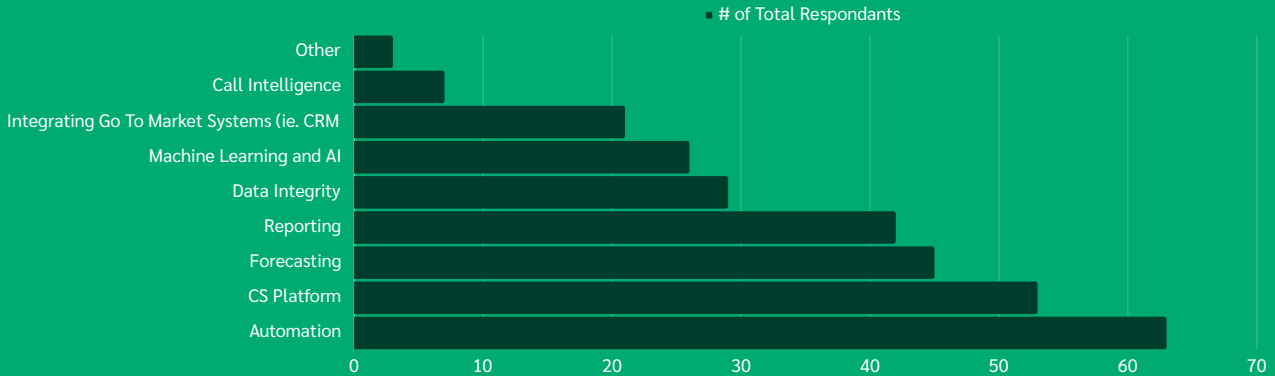
What process improvements are you hoping to invest on in 2024?

SMBs programs investments are in line with the overall population of the study with defining Customer Outcomes as a key priority for 2024.

■ # of Total Respondants

Category	Value
Other	
Mapping Personas inside Customer Accounts	
CSQLs and other Growth Plays	
Segmentation	
GTM Alignment (Marketing:Sales:CS)	
New and Improved High-Touch CS Playbooks	
Customer Journey Mapping	
Defining Customer Outcomes	

Medium Business Deep Dive

ARR
2.2%

NRR, GRR
10.6%

GRR
13.4%

NRR
66%
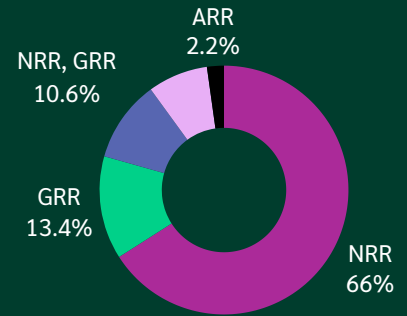
What challenges are CS leaders trying to solve in 2024?
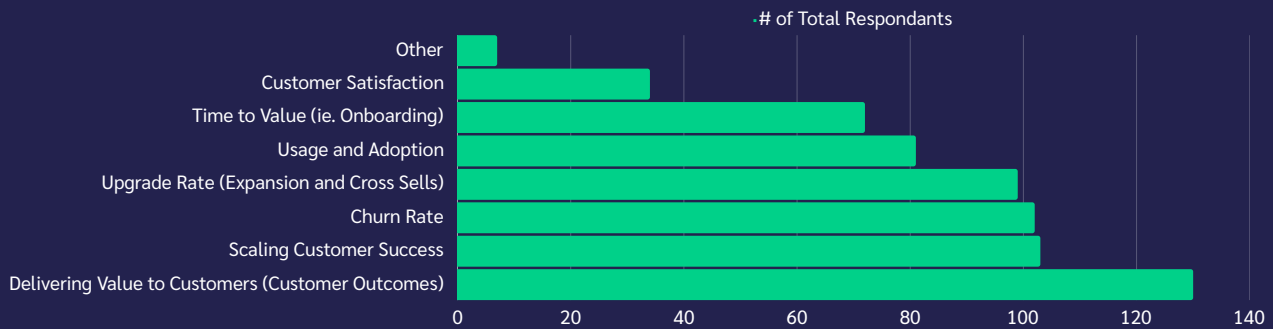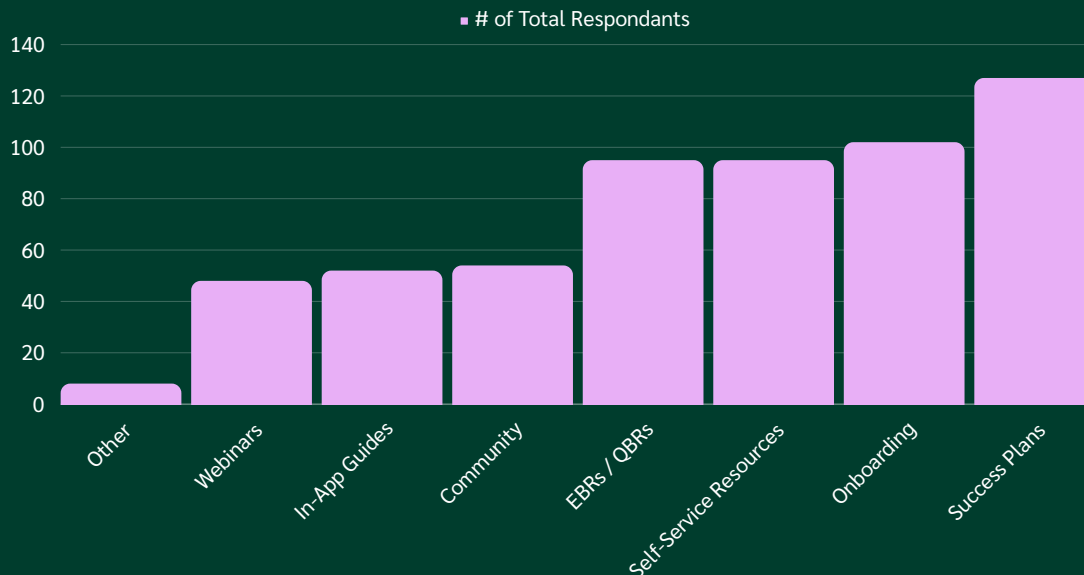
Mid-Market companies want to drive more value for customers through scaled motions .

•# of Total Respondants

- Other
- Customer Satisfaction
- Time to Value (ie. Onboarding)
- Usage and Adoption
- Upgrade Rate (Expansion and Cross Sells)
- Churn Rate
- Scaling Customer Success
- Delivering Value to Customers (Customer Outcomes)

0   20   40   60   80   100   120   140

What programs investments will CS Leaders make in 2024?
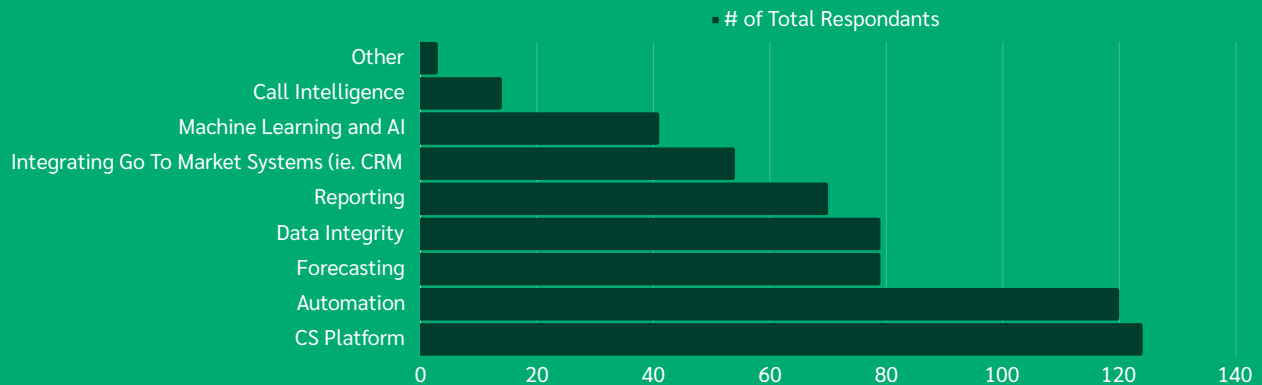
Mid-market companies want to deliver both high-touch and low-touch well. This survey shows that leaders are investing in both ends of the segmentation and across the entire customer journey next year.

■ # of Total Respondants

140
120
100
80
60
40
20
0

Other | Webinars | In-App Guides | Community | EBRs / QBRs | Self-Service Resources | Onboarding | Success Plans
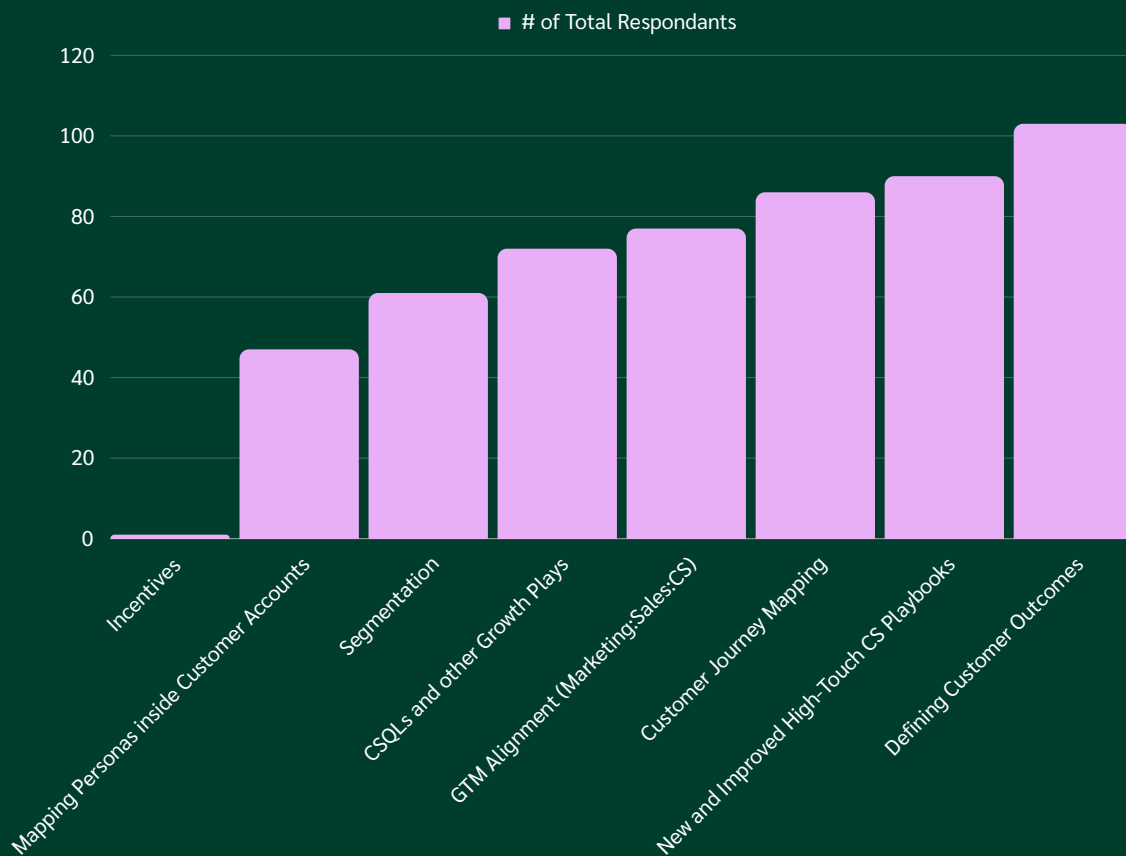
What system improvements are CS leaders prioritising in 2024?

CS Platform and Automation rank as the top system priorities for Mid-Market Leaders who want to ensure efficient growth and value delivery.

# of Total Respondants

Category	
Other	
Call Intelligence	
Machine Learning and AI	
Integrating Go To Market Systems (ie. CRM	
Reporting	
Data Integrity	
Forecasting	
Automation	
CS Platform	

0   20   40   60   80   100   120   140

What process improvements are you hoping to invest on in 2024?

CS leaders in Mid-Market are re-thinking their delivery strategy in 2024 by defining Customer Outcomes, creating new and revamped high-touch playbooks for their teams and mapping the customer journey.

# of Total Respondants

Incentives · Mapping Personas inside Customer Accounts · Segmentation · CSQLs and other Growth Plays · GTM Alignment (Marketing:Sales:CS) · Customer Journey Mapping · New and Improved High-Touch CS Playbooks · Defining Customer Outcomes

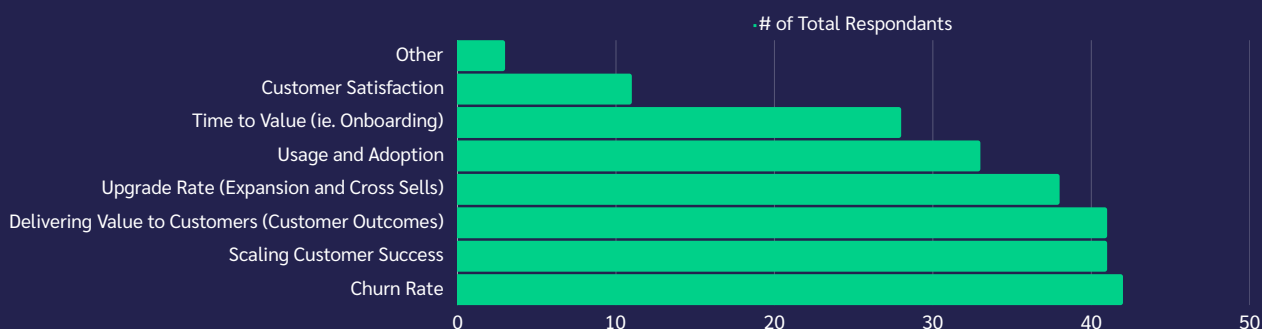# Corporate Business Deep Dive

Other
6.3%

NRR, GRR
17.2%

GRR
12.5%

NRR
62.4%
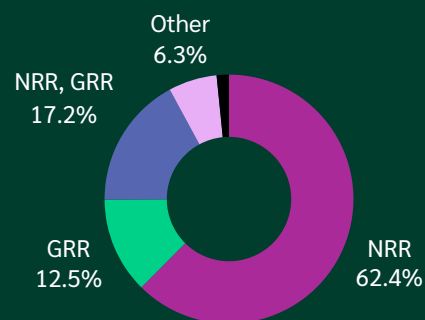
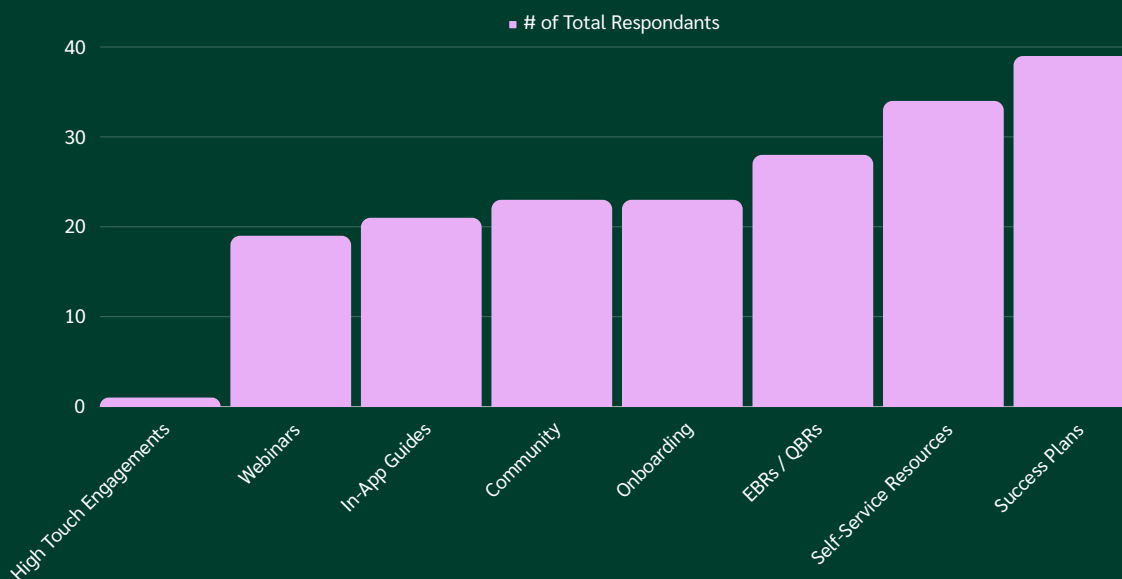## What challenges are CS leaders trying to solve in 2024?

Corporate businesses reported a higher Churn Rate challenge than any other segment.

# of Total Respondants

Category	
Other	
Customer Satisfaction	
Time to Value (ie. Onboarding)	
Usage and Adoption	
Upgrade Rate (Expansion and Cross Sells)	
Delivering Value to Customers (Customer Outcomes)	
Scaling Customer Success	
Churn Rate	

0   10   20   30   40   50

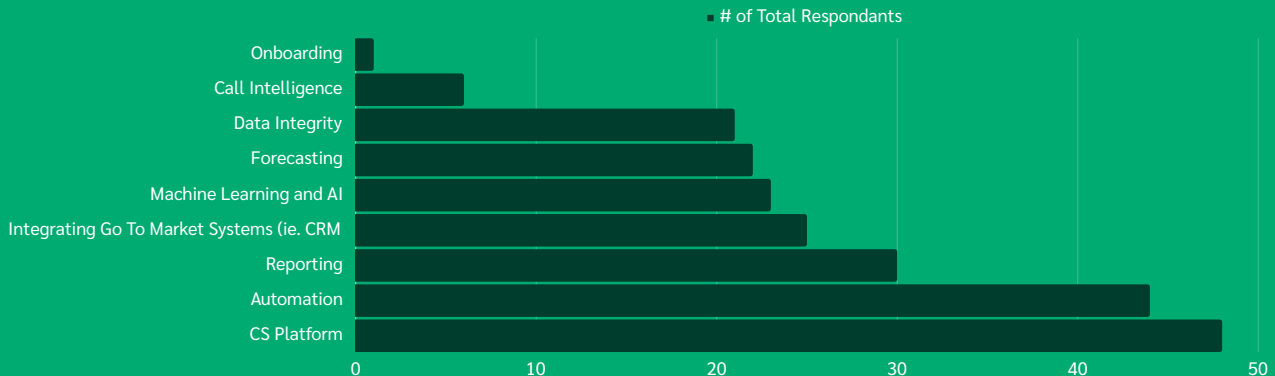---

What programs investments will CS Leaders make in 2024?

Corporate leaders are hoping to fight churn by investing in strategic plays such as EBRs and Success Plans, while also scaling their CS team's capacity through self-service.

# of Total Respondants

High Touch Engagements · Webinars · In-App Guides · Community · Onboarding · EBRs / QBRs · Self-Service Resources · Success Plans
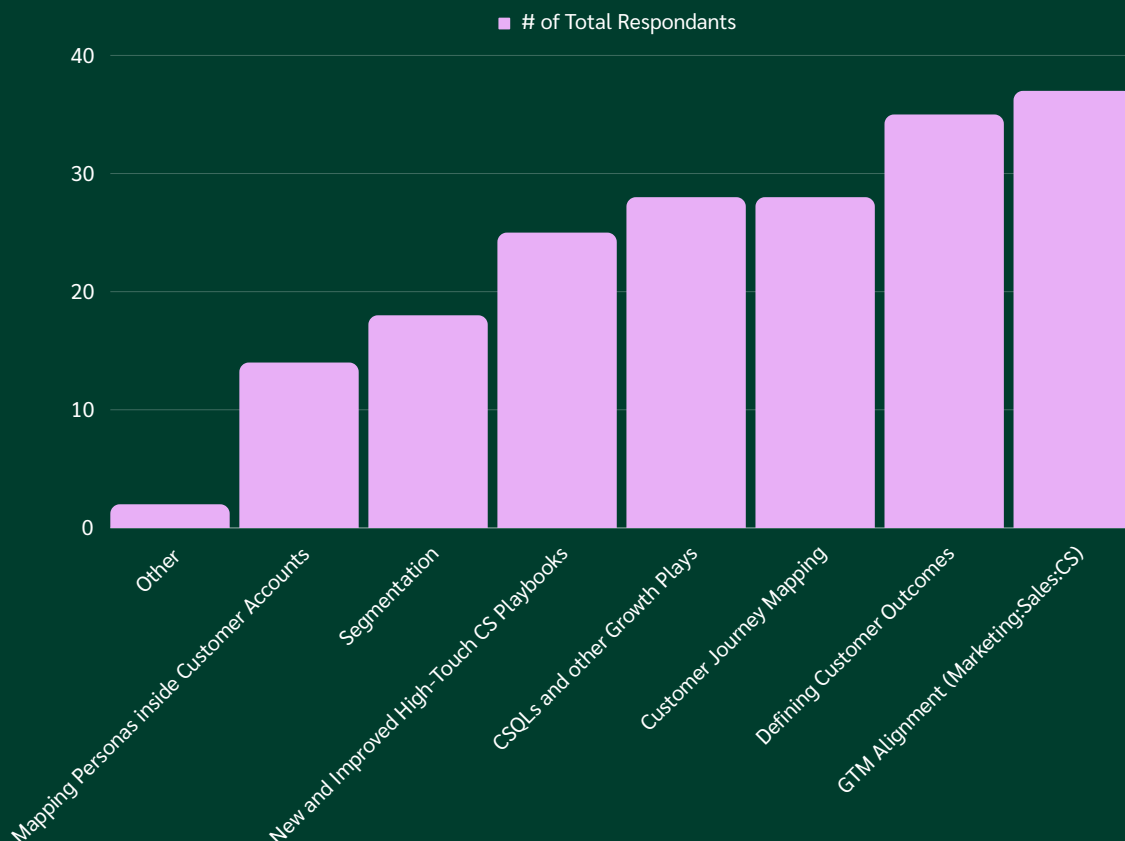
What system improvements are CS leaders prioritising in 2024?

Corporate leaders are doubling down on investments in CS Platforms to better support CS programs, deliver value for customers and have visibility of their customer data. Automation will also play a big part in helping Corporates be more efficient in 2024.

■ # of Total Respondants

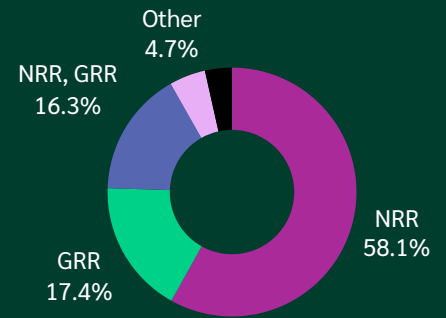| Category	Value
Onboarding	~1
Call Intelligence	~6
Data Integrity	~21
Forecasting	~22
Machine Learning and AI	~23
Integrating Go To Market Systems (ie. CRM	~25
Reporting	~30
Automation	~44
CS Platform	~48

(x-axis: 0, 10, 20, 30, 40, 50)

What process improvements are you hoping to invest on in 2024?

Corporate CS Leaders ranked aligning with internal counterparts in Go-To-Market as the top process investment in 2024, ahead of customer outcomes and customer journeys, highlighting that in larger organisations there's an opportunity to solve internal friction between teams.

■ # of Total Respondants

Category	Value
Other	~2
Mapping Personas inside Customer Accounts	~14
Segmentation	~18
New and Improved High-Touch CS Playbooks	~25
CSQLs and other Growth Plays	~28
Customer Journey Mapping	~28
Defining Customer Outcomes	~35
GTM Alignment (Marketing:Sales:CS)	~37

(y-axis: 0, 10, 20, 30, 40)

Enterprise Business Deep Dive

Other
4.7%

NRR, GRR
16.3%

GRR
17.4%
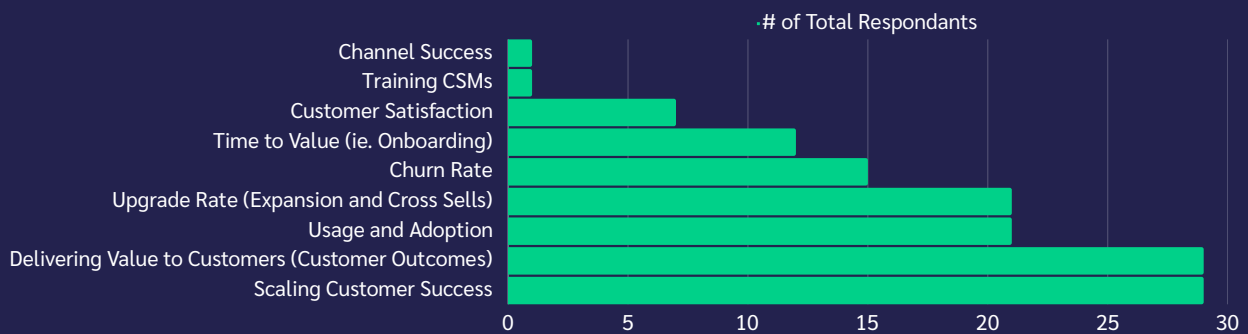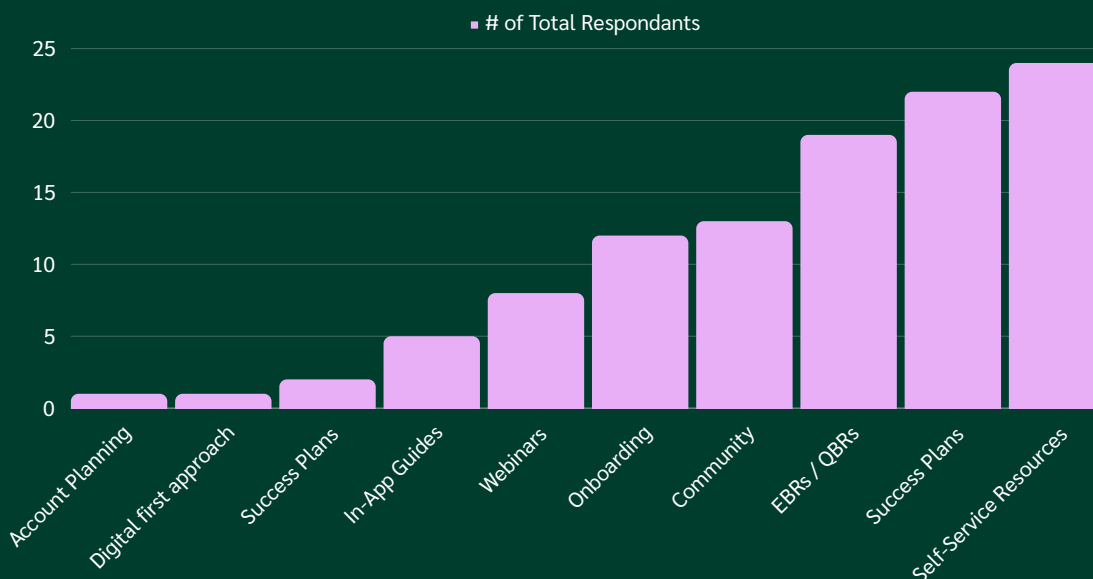
NRR
58.1%

What challenges are CS leaders trying to solve in 2024?

Enterprises ranked Scaling Customer Success and Delivering Value to Customers as the top two challenges for 2024.

of Total Respondants

- Channel Success
- Training CSMs
- Customer Satisfaction
- Time to Value (ie. Onboarding)
- Churn Rate
- Upgrade Rate (Expansion and Cross Sells)
- Usage and Adoption
- Delivering Value to Customers (Customer Outcomes)
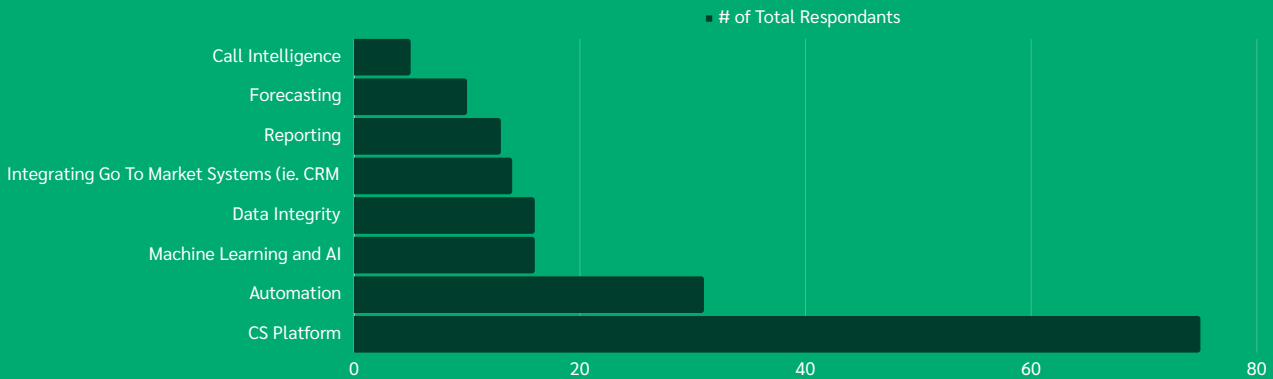- Scaling Customer Success

What programs investments will CS Leaders make in 2024?

Enterprises are investing in the creation of self-service resources to support scale, at a higher rate than any other segment. At the same time, high-touch programs continue to play an important role with Success Plans and EBRs ranking as top priorities too.

of Total Respondants

- Account Planning
- Digital first approach
- Success Plans
- In-App Guides
- Webinars
- Onboarding
- Community
- EBRs / QBRs
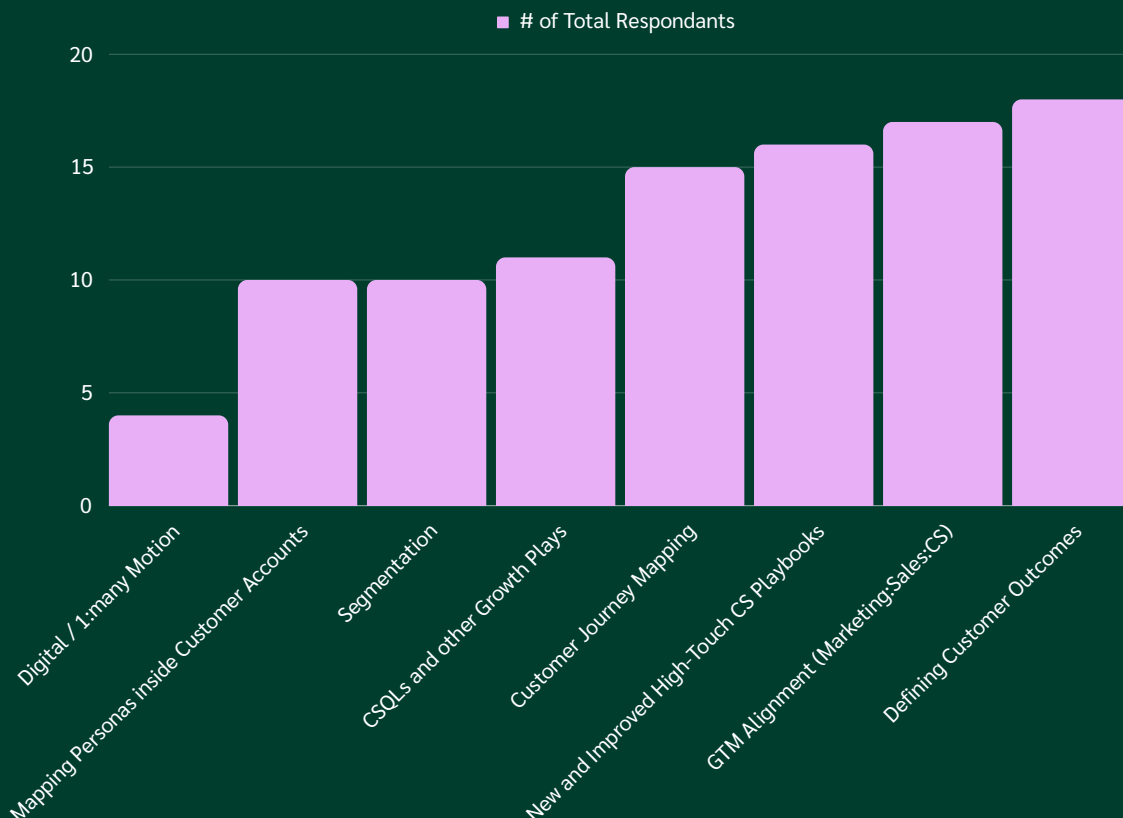- Success Plans
- Self-Service Resources

What system improvements are CS leaders prioritising in 2024?

To support both high-touch and low-touch CS programs in 2024, Enterprise leaders are investing heavily in CS Platforms and Automation. In this segment, we also see a higher rate of investment in innovative technologies such as Machine Learning and AI to help scale their teams.

Horizontal bar chart titled "# of Total Respondants"

Category	Value
Call Intelligence	~5
Forecasting	~10
Reporting	~13
Integrating Go To Market Systems (ie. CRM	~14
Data Integrity	~16
Machine Learning and AI	~16
Automation	~31
CS Platform	~75

What process improvements are you hoping to invest on in 2024?

Enterprise CS Leaders ranked Defining Customer Outcomes as a key process improvement for 2024, showing that even mature companies still struggle with value realisation. The need to alignment with internal counterparts in GTM to fight friction in the customer journey is also a priority for enterprises.

Bar chart titled "# of Total Respondants"

Category	Value
Digital / 1:many Motion	4
Mapping Personas inside Customer Accounts	10
Segmentation	10
CSQLs and other Growth Plays	11
Customer Journey Mapping	15
New and Improved High-Touch CS Playbooks	16
GTM Alignment (Marketing:Sales:CS)	17
Defining Customer Outcomes	18

Conclusion and Recommendations

There's no bigger challenge or opportunity for CS teams in 2024 than defining, delivering and measuring customer outcomes.

Throughout this research, it's clear to see that independently of your company size, having a clear understanding of why your customers bought your product and being able to measure and communicate it is the key to unlocking value.

Unless we remove this blocker, we will not be able to scale Customer Success. Any investment in CS Platforms and automation, must be anchored in value realisation to avoid creating a noisy and valueless ecosystem for our customers.

Next steps

#	Recommendations	Resource
1	Define a standard set of Customer Outcomes using the Jobs to be Done Framework	GUIDE
2	Map the Customer Journey to ensure you are moving customers towards their outcomes at every step of the way.	GUIDE
3	Implement Smart Systems that allow you to scale your customer success organisation while proactively working with customers.	GUIDE
4	Create the programs and content that support value realisation ie. EBRs, Success Plans, Self-Service Content etc.)	GUIDE

🍀 Thank you!

This research was only possible because 604 participants gave their time and shared openly and honestly about challenges and opportunities for next year. The collective brain of this community is our superpower.

I hope this report is helpful in setting, validating and communicating your priorities and strategies for 2024 and beyond!