

Customer success enablement program builder

A practical workbook for designing structured, measurable enablement that sharpens CSM performance and strengthens customer outcomes

Use this worksheet to design a structured CS enablement program that supports new hires, improves consistency across customer lifecycle motions, and creates measurable links between enablement activity, CSM confidence, and customer outcomes.

Work through each section in sequence — from sizing your current capability and clarifying team purpose, through to building an onboarding program, documenting playbooks, and establishing the metrics that prove impact.

1. Set your context

Fill in the basics before you begin. This grounds the enablement plan in a specific team, segment, and planning period.

Company/product name	Team or segment in scope
e.g., Acme SaaS – Customer Success	e.g., Enterprise CSMs; Digital CS pod
Planning period	Owner(s)
e.g., Q3–Q4 2025	e.g., Head of CS Enablement, CS Ops Lead, VP Customer Success
Enablement goal	
What are we trying to improve?	What would success look like?
e.g., Reduce inconsistency in how CSMs run lifecycle conversations	e.g., Every CSM follows a documented cadence; onboarding time halved

2. Assess your CS enablement maturity

An honest diagnosis is more useful than an optimistic one. The point is to understand what needs to change next, not to appear more advanced than you are.

Stage	What it looks like	Evidence in your organization	Current status
Fragmented	No consistent approach. Each CSM – or each manager essentially makes it up. Onboarding quality depends entirely on who a new hire sits next to.	<i>e.g., New hires shadow whoever is available; no shared playbooks exist.</i>	☐ Not us ☐ Partly us ☐ Very much us
Ad-hoc	Some resources exist, but they are scattered and inconsistently applied. Enablement responds to crises rather than preventing them.	<i>e.g., Content is created after a pattern of customer complaints surfaces.</i>	☐ Not us ☐ Partly us ☐ Very much us
Structured	A clear roadmap, regular leadership alignment, and shared resources that CSMs actually know how to find and use.	<i>e.g., Lifecycle playbooks are documented; managers reference them in 1-1s.</i>	☐ Not us ☐ Partly us ☐ Very much us
Strategic	Enablement is data-driven and forward-looking – shaping priorities based on performance signals and business outcomes, not gut feel.	<i>e.g., Roadmap is updated each quarter using health-score trends and CSM survey data.</i>	☐ Not us ☐ Partly us ☐ Very much us

Maternity diagnosis

Current maturity stage	Biggest enablement gap	Target maturity stage
e.g., Ad-hoc	<i>e.g., Resources exist, but CSMs don't know where to find them or when to use them</i>	<i>e.g., Structured</i>

3. Define your enablement principles and operating model

Use these principles to decide what belongs in your enablement program – and what does not.

Principle	What it means	How we'll apply it
Outcome-anchored	Every enablement activity is tied to a CSM behavior that influences a customer outcome.	<i>e.g., Prioritize activities that connect directly to retention or expansion signals.</i>
Continuous, not episodic	Capability is built over time, not delivered in a single training event.	<i>e.g., Quarterly enablement themes replace one-off workshops.</i>
Evidence-led	Roadmap decisions are driven by data and CSM feedback, not assumptions.	<i>e.g., Survey scores and activity-compliance data reviewed every quarter.</i>

Operating model

Focus area	Purpose	Owner	Key outputs
Direction-setting	Align the program with business strategy and CS priorities.		<i>e.g., Enablement roadmap, stakeholder cadence, priority framework</i>
"Always-on" support	Keep CSMs equipped with resources, content, and skill-building between cohorts.		<i>e.g., Quarterly enablement sessions, playbooks, quick-start guides</i>
New-hire acceleration	Bring new CSMs to full productivity through a repeatable, structured program.		<i>e.g., Onboarding sprint, readiness assessment, certification</i>

Targeted initiatives	Deliver focused programmes tied to a specific business need or gap.	<i>e.g., Risk-management sprint, value storytelling, product release prep</i>
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4. Map your internal network

No enablement function succeeds in isolation. Identify who can contribute expertise, validate content, or co-deliver sessions.

Partner group	What they can contribute	How we'll involve them
CS leadership	Strategic priorities, performance expectations, business context	<i>e.g., Quarterly roadmap sign-off</i>
Experienced CSMs	Real-world scenarios, proven approaches, peer credibility	<i>e.g., Lead live practice sessions</i>
Product & PMM	Product knowledge, release timelines, messaging	<i>e.g., Own product enablement modules</i>
Sales/revenue	Pre-sale context, expansion motions, handoff quality	<i>e.g., Co-deliver land-to-adopt training</i>
CS Ops/Analytics	Health-score data, dashboards, system configuration	<i>e.g., Build compliance reporting</i>
People & Talent	Hiring timelines, onboarding logistics, role clarity	<i>e.g., Coordinate new-hire cohort dates</i>

Commitment tracker

Partner	Commitment needed	Frequency	Confirmed?
<i>e.g., Experienced CSMs</i>	<i>e.g., Run one scenario exercise per cohort</i>	<i>e.g., Per cohort</i>	☐ Yes ☐ No

	☐ Yes
	☐ No
	☐ Yes
	☐ No

5. Prioritize the lifecycle activities that matter most

Start with the CSM activities that should happen consistently across every account or every relevant segment. Keep this list short enough to embed – you can always expand later.

Lifecycle stage	Key CSM activity	Why it matters	Required cadence	Tracking mechanism
Inherit	Absorb sales context and customer background	Prevents knowledge drop-off at handover	<i>e.g., At contract close</i>	<i>e.g., Handover record in CRM</i>
Activate	Manage the transition from implementation into ongoing CS	Closes ownership gaps; sets customer expectations	<i>e.g., At go-live</i>	<i>e.g., Activation task completed</i>
Adopt	Track health signals and product adoption	Surfaces risk early; spots expansion signals	<i>e.g., Weekly / monthly</i>	<i>e.g., Health score updated</i>
Prove	Lead value reviews with senior stakeholders	Links product use to the customer's stated priorities	<i>e.g., Quarterly for enterprise</i>	<i>e.g., Review completed</i>
Renew	Surface renewal and growth opportunities	Translates customer success into revenue outcomes	<i>e.g., 120 days pre-renewal</i>	<i>e.g., Growth plan updated</i>

Priority check

Before adding an activity to the programme, confirm it passes all five checks.

- ☐ This activity applies to most customers or a clearly defined segment.
- ☐ We can clearly explain what good looks like.
- ☐ Managers can coach against it in one-to-ones.
- ☐ It influences customer outcomes, retention, renewal, or expansion.
- ☐ We can track whether it happened.

6. Design your CS onboarding program

Use this section to create a structured onboarding program for new CSMs. Focus on what new hires need to know at the end of onboarding, not everything they might learn over five years.

Boot camp purpose	What a new CSM should be able to do by the end
<i>e.g., Give new CSMs the foundational knowledge, customer context, lifecycle motions, and internal network they need to begin managing customers confidently.</i>	<i>e.g., Prepare for a handoff, run a purposeful customer conversation, identify risk signals, and know where to find core resources.</i>

4 non-negotiables for onboarding new CSMs

Element	What it covers	How we'll deliver it
Context	Who we sell to, what they buy us for, where we fit in their world. The mental model a CSM operates from.	<i>e.g. ICP deep-dive with PMM, customer-story panel, last 10 churn post-mortems as reading</i>
Craft	The actual moves – handoff, health review, risk conversation, value review. Practised, not just watched.	<i>e.g. Role-plays with a senior CSM on each motion, manager-observed practice</i>
Crew	The internal humans they'll quarterback through. Names, not org charts.	<i>e.g. 15-min 1:1s with named contacts in Product, Support, Sales, Ops</i>
Cockpit	The tools, dashboards and systems they fly the job from.	<i>e.g. CS platform walkthrough, CRM hygiene rules, where every play is logged</i>

7. Your 4-week plan

Map each week to a clear focus, practice activity, and assessment. The goal is a consistent experience that still leaves room for live discussion and coaching.

Week	Focus	Key sessions	Practice activity	Assessment
Week 1	Company foundations	<i>e.g., Company overview, customers, products, competitors, culture</i>	<i>e.g., Customer challenge discussion</i>	<i>e.g., Knowledge quiz</i>
Week 2	CS lifecycle & motions	<i>e.g., Handoff, onboarding transition, adoption, cadence calls</i>	<i>e.g., Mock customer handoff</i>	<i>e.g., Scenario assessment</i>
Week 3	Customer outcomes & risk	<i>e.g., Health scoring, value realization, stakeholder alignment, risk management</i>	<i>e.g., Risk role play</i>	<i>e.g., Manager feedback</i>
Week 4	Renewal & expansion	<i>e.g., Renewal planning, expansion signals, churn learnings</i>	<i>e.g., Final customer scenario presentation</i>	<i>e.g., Company shoutout upon completion</i>

New CSM readiness checklist

- ☐ Explain customer types and core business challenges.
- ☐ Monitor customer health and adoption.
- ☐ Explain renewal and expansion basics.

- ☐ Navigate the customer lifecycle and key moments of truth.
- ☐ Run a purposeful customer conversation.
- ☐ Know where to find key resources and templates.
- ☐ Prepare for a customer transition or handoff.
- ☐ Identify common risk signals.
- ☐ Understand when and how to engage internal partners.

8. Create quick-start guides for key activities

For each priority lifecycle activity, create a short, easy-to-use guide. Avoid long documentation that CSMs will not use.

Guide section	What to include
Purpose	Why this activity matters
When to use it	Trigger, lifecycle stage, or cadence
What good looks like	Clear success criteria
Steps to follow	Simple, sequenced actions
Tools or systems	Where to complete or track the activity
Templates	Links to decks, agendas, email drafts, or worksheets
Examples	Sample customer calls, notes, or completed fields
Manager coaching prompts	Questions managers can use in 1:1s

Quick-start guide builder

Activity name	Purpose	When it should happen
<i>e.g., Executive Business Review</i>	<i>e.g., Align stakeholders on value delivered, priorities, risks, and next steps.</i>	<i>e.g., Quarterly for enterprise accounts; biannually for mid-market.</i>

Steps	What good looks like	Where to track completion
1. Review goals, health, usage, and risks. 2. Confirm stakeholders and meeting objective. 3. Prepare agenda and value story. 4. Capture decisions and next steps.	<i>e.g., Customer agrees on priorities, confirms value achieved, and commits to next-step actions.</i>	<i>e.g., CS platform, CRM activity field, customer plan tracker.</i>

9. Build your measurement system

Measure whether enablement is being used, whether CSMs feel equipped, and whether the right customer activities are happening.

Activity compliance dashboard

Metric	What it tells you	Data source	Review cadence
Activity completion rate	Whether key motions are happening	<i>e.g., CS platform, CRM</i>	Weekly/monthly
Completion by segment	Where adoption varies	<i>e.g., Enterprise, mid-market, SMB</i>	Monthly
Manager 1:1 usage	Whether managers are reinforcing behavior	<i>e.g., Manager dashboard</i>	Weekly
Low-compliance activities	Where enablement may need to intervene	<i>e.g., Dashboard report</i>	Monthly
Trend over time	Whether adoption is improving	<i>e.g., Quarterly dashboard</i>	Quarterly

CSM enablement survey

Survey question	Response format
I can easily find the resources I need to execute key customer activities.	1-5
Current enablement content helps me execute key lifecycle motions effectively.	1-5

I feel confident managing customer health and adoption.	1-5
I feel confident identifying and managing customer risk.	1-5
I feel confident leading value realization conversations.	1-5
I know what is expected of me at each stage of the customer lifecycle.	1-5
What is one area where you need more support?	Open text
Which resources are hardest to find or use?	Open text

10. Turn data into your enablement roadmap

Use compliance data and CSM sentiment together. Low compliance does not always mean training is missing; it may mean the process is unclear, the system is hard to use, or the activity is not valuable enough.

Signal	Possible interpretation	Follow-up action
Low compliance + low confidence	CSMs need training, examples, or practice.	Build enablement session and quick-start guide.
Low compliance + high confidence	Process or tracking may be unclear.	Review workflow, systems, or manager expectations.
High compliance + low confidence	CSMs are doing the activity but may not feel effective.	Add coaching, role plays, examples, or peer review.
High compliance + high confidence	Motion is likely working well.	Maintain and monitor.

Roadmap prioritization

Enablement need	Source of insight	Business importance	Effort	Priority
<i>e.g., Value realization training</i>	<i>e.g., Survey + low transition compliance</i>	High	Medium	P1
<i>e.g., Resource navigation support</i>	<i>e.g., Survey comments</i>	Medium	Low	P2
<i>e.g., Risk management role plays</i>	<i>e.g., Manager feedback + risk dashboard</i>	High	Medium	P1

11. Establish your operating cadence

Create a regular rhythm for reviewing adoption, feedback, and business priorities. This keeps enablement from becoming a shelf asset.

Cadence	Activity	Participants	Output
Weekly	Review low-compliance activities and manager feedback	Enablement + CS ops	Enablement action items
Monthly	Align with CS leadership on priorities	Enablement + CS leadership	Updated roadmap
Quarterly	Run CSM sentiment survey	CSM team	Confidence and resource insights
Quarterly	Review roadmap impact	Enablement + leadership	Decisions on what to continue, change, or stop
Per cohort	Review onboarding feedback and assessment results	Enablement + hiring managers	Runway improvements

Final CS enablement program summary

Planning area	Your summary
Current maturity stage	
Target maturity stage	
Top three lifecycle activities to standardize first	1. 2.

	3.
New hire onboarding model	<i>e.g., Four-week hybrid runway program with live practice and quizzes</i>
Ongoing enablement model	<i>e.g., Quarterly enablement themes based on dashboard compliance and CSM survey results.</i>
Measurement approach	<i>e.g., Activity compliance dashboards, CSM confidence surveys, manager one-to-one reporting, and cohort feedback.</i>

12. 30-day action plan

Turn the strategy into a clear first month of execution. Assign owners and deadlines so the plan becomes operational quickly.

Action	Owner	Deadline	Status
Confirm top lifecycle activities with CS leadership.			
Audit existing enablement resources.			
Create a quick-start guide format.			
Define onboarding readiness criteria.			
Build baseline CSM enablement survey.			
Create first compliance dashboard or tracker.			
Add your own action.			
Add your own action.			