BEVERLY HATHORN CONSULTING · CUSTOMER SUCCESS LEADERSHIP ADVISORY

Sample Executive Roadmap

An illustrative example of the format and depth delivered at the close of a Customer Success Leadership & Performance Diagnostic.

> **Sample document.** This is an illustrative example built to show the structure and depth of a completed diagnostic. It does not reflect any actual client, company, or engagement. Findings, names, and details are composite and for demonstration purposes only.

EXECUTIVE SUMMARY

This diagnostic reviewed leadership practices, execution consistency, and operating rhythms across the Customer Success organization. The review pointed to a small number of specific gaps, most centered on how risk is identified and how consistently managers coach toward outcomes, that are likely contributing to unpredictable renewals and uneven CSM performance. The findings below outline what to prioritize first and what to do differently over the next 90 days.

PRIORITY RISKS

RISK 1

Customer Activity Is Being Mistaken for Customer Confidence

Several accounts marked "healthy" show strong usage activity but limited engagement from economic buyers or executive sponsors. Activity is being tracked closely, but genuine confidence and perceived value are not being assessed with the same rigor, which creates blind spots heading into renewal.

RISK 2

Manager Coaching Is Inconsistent Across Pods

Coaching quality and cadence vary significantly by manager. Some CSMs receive regular, structured guidance on risk and adoption; others largely self-direct. This inconsistency is a likely driver of uneven execution across the org.

RISK 3

Ownership Gaps at the Onboarding-to-Adoption Handoff

Accounts frequently lose momentum in the transition from onboarding to ongoing adoption, with no single owner clearly accountable during that window. This is where several at-risk accounts appear to first start disengaging.

RISK 4

Risk Signals Are Identified Late Relative to Renewal Timelines

Risk is typically flagged within 30 to 45 days of renewal, leaving limited runway to intervene meaningfully. Earlier-stage signals appear to exist but are not being consistently captured or escalated.

PRIORITIZED RECOMMENDATIONS

— **Separate activity metrics from confidence indicators** in account health scoring, so usage data and stakeholder sentiment are evaluated as distinct signals rather than blended into one score.

— **Standardize a manager coaching cadence** across all pods, with a shared framework for what "good coaching" covers, so consistency is not dependent on individual manager habits.

— **Assign clear ownership at the onboarding-to-adoption handoff**, with a defined checkpoint that confirms the account has an active, accountable owner before it is considered "steady state."

— **Move risk identification earlier** by defining what a 90-day and 60-day risk signal looks like, rather than relying primarily on signals that surface close to renewal.

90-DAY ACTION PLAN

First 30 Days

- Separate activity and confidence indicators in health scoring
- Align managers on a shared coaching framework
- Identify accounts currently in the onboarding-to-adoption gap

Days 31–60

- Roll out standardized coaching cadence across all pods
- Assign clear ownership checkpoints at handoff stages
- Pilot earlier risk-signal criteria on a subset of accounts

Days 61–90

- Expand earlier risk signals org-wide
- Review coaching consistency across managers
- Reassess renewal predictability against baseline

EXECUTIVE STRATEGY SESSION

Findings above are typically walked through in a 60-minute debrief with the CS leadership team, focused on sequencing, ownership, and what to communicate upward as the plan is put into motion.

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Leadership that Gets Noticed.
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Discuss the Diagnostic