

THE
SUCCESS
Studio

Guiding your Customer Success career forward.

FIRST 90 DAYS

Structure, confidence, and repeatable habits to help you excel and make an impact from day one.



AGENDA

3	The Objective
4	First 30 Days
6	60 Days
7	90 Days
8	Tracking Your Progress
10	Adding Value
11	Wrap Up
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THE OBJECTIVE

This presentation is designed to help new Customer Success Managers navigate their first 90 days with clarity and confidence.

It provides a structured framework to:

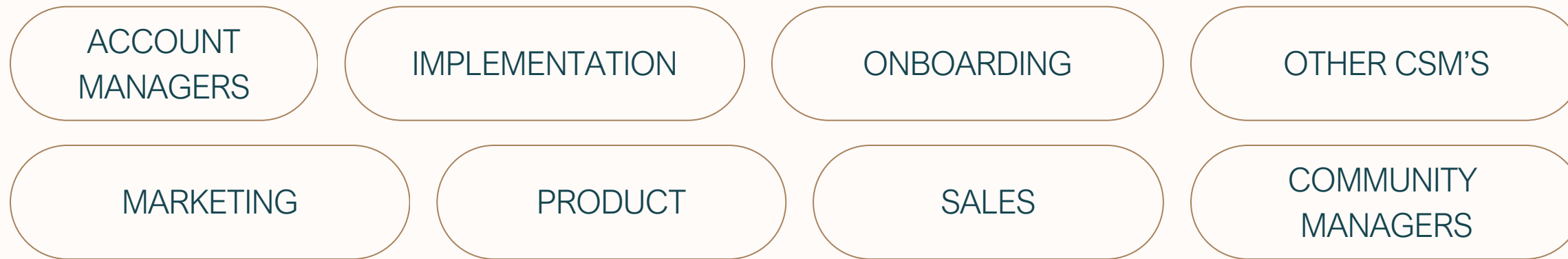
- Build strong internal and external relationships.
- Establish repeatable habits that drive measurable impact.
- Align personal growth with customer and business outcomes.

By following this plan, you will build the foundation to become a trusted advisor who delivers value from day one (internally and externally).



FIRST 30 DAYS

Stakeholders to learn from



Desired Outcome by Day 30:

Build understanding, credibility, and internal relationships.
A clear understanding of your customers, internal systems and the value your company delivers.

Key Focus Areas:

- ✓ Internal discovery (meet teams, understand product, systems, and metrics)
- ✓ External discovery (review portfolios, customer journeys, renewals)
- ✓ Identify early wins

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FIRST 30 DAYS

REFLECTION PROMPTS

WHAT DO I NEED TO LEARN TO ADD VALUE FAST?

WHAT METRICS MATTER FOR MY TEAM & THE BUSINESS?

WHAT SUCCESS STORIES CAN I LEARN FROM THE PEOPLE I MEET?

WHAT CHALLENGES ARE WE FACING AS A TEAM & AS A BUSINESS?

Key Focus Areas:

- ✓ Map out Discovery questions (Internal & External)
- ✓ Review CRM Notes
- ✓ Understand who your competitors are
- ✓ Familiarise yourself with your product and service portfolio and use cases

Example: Guiding Questions to ask your customer

- How can I best support you as your new CSM?
- What would make this partnership feel like a clear yes to renew or expand?

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60 DAYS

ENGAGE STRATEGICALLY

DESIRED OUTCOME BY DAY 60:

YOU'VE BUILT RELATIONSHIPS, IDENTIFIED RISKS AND OPPORTUNITIES, AND STARTED DEMONSTRATING STRATEGIC VALUE.

FOCUS AREAS

CUSTOMER SEGMENTATION & PRIORITISATION

ENGAGEMENT STRATEGY

PIPELINE & GROWTH

OBJECTION HANDLING

STORYTELLING WITH DATA

STRATEGIC QUESTIONING

ACCOUNT PLANS

BUSINESS REVIEWS

RISK TRACKERS



90 DAYS

Desired Outcome by Day 90:

Deliver measurable outcomes and establish long-term trust.

BUILD INTERNAL CREDIBILITY:
share your wins & learnings across the team

CUSTOMER OUTCOMES →

Identify and define success metrics for your key accounts and track ROI.

LONG TERM GOALS →

Account mapping to understand where future opportunities may lie.

INTERNAL COLLABORATION →

Collaborate with Marketing on success stories and use cases. Share product feedback with product and inform sales of potential opportunities.

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TRACKING YOUR PROGRESS

Weekly Reflection Questions

- What went well this week?
- What challenges did I face?
- What's one thing I'll focus on next week?
- How will I continue to build impact next week?

EXAMPLE OF A PROGRESS TRACKER

Milestone	Status	How confident do I feel about this? (1 -10)	Date	Notes
Product Knowledge (list all products + services)	<input type="checkbox"/> In progress <input type="checkbox"/> Done			
Customer & Market Knowledge	<input type="checkbox"/> In progress <input type="checkbox"/> Done			
Knowledge of your organisation's goals	<input type="checkbox"/> In progress <input type="checkbox"/> Done			
Understands internal KPIs	<input type="checkbox"/> In progress <input type="checkbox"/> Done			
Confidence & Ownership	<input type="checkbox"/> In progress <input type="checkbox"/> Done			

KEEP TRACK OF REVENUE GENERATED IN UPSELLS & CROSSELLS



I use a Book of Business spreadsheet to keep track of accounts, risks and opportunities (including revenue)

METRICS TO TRACK

INCREASE IN ENGAGEMENT

NUMBER OF CUSTOMERS ATTENDING E.G.
BUSINESS REVIEWS

INCREASE IN USAGE

IMPROVEMENTS IN NPS + CSAT

STAKEHOLDER EXPANSION

INCREASE IN FEATURE ADOPTION RATE

SENTIMENT IMPROVEMENT IN CUSTOMER
FEEDBACK OR SURVEY RESPONSES

REDUCTION IN SUPPORT TICKETS

CHANGES IN CUSTOMER HEALTH

UPDATED & COMPLETE ACCOUNT PLAN



ADDING VALUE

New Starter Guide

Start a new starter guide to be used as a shared resource for new starters. Not only does this help new team members ramp up faster, feel supported, and stay aligned but it showcases your knowledge, and drive. This also alleviates workload from your managers and team, ensures everyone in the team has the same knowledge and is scalable.

Skill Gap Analysis

This is a great way to track progress and understand areas where you need more support. See example on the right.

Skill Gap Analysis Example

Skill Area	Description	Current Level (1–5)	Desired Level (1–5)	Development Actions
Product Knowledge (do this for all products and services)	Understanding product features, use cases, and roadmap	3	5	Attend product enablement sessions; shadow senior CSM demos
Customer Lifecycle	Understanding all customer touch points and key milestones	4	5	Review this with manager or colleagues
Strategic Thinking	Ability to connect customer goals to business outcomes	2	5	Learn success planning frameworks (e.g. Outcome-Based selling)
Renewal & Retention Strategy	Managing renewal timelines, identifying risk, and forecasting	3	5	Collaborate with sales & manager on renewal planning; use CRM insights
Data & Insights	Using metrics to drive conversations and decisions	2	4	Learn to use product analytics dashboards and how to present findings

WRAP UP

30-60-90 Learning Timeline



30 Days

Outcome:

Clear understanding of what success looks like for customers and the business.

60 Days

Outcome:

Actively driving engagement and measurable results with customers.

90 Days

Outcome:

Recognised as a trusted advisor delivering measurable impact.

FOR MORE INFORMATION



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