



A Success Plan that Drives Real Business Outcomes

Customer Success in 2025



Introduction

In a world where Customer Success teams are being asked to do more with less, the ability to influence strategic outcomes, not just deliver support, is what sets the best apart.

This guide is designed to help you build success plans that do exactly that.

The purpose of a success plan isn't just to align on actions; it's to plan, track, and drive progress toward business metrics that truly matter to your customer. **Done well, it becomes the foundation for value realisation, stakeholder alignment, and renewal.**

Whether you're starting fresh or course-correcting mid-motion, we'll walk you through when to introduce a success plan, how to make it relevant, and how to structure it using the OGSM framework so that every action you take ties back to what your customer actually values and leads to long-term partnership success.

So what is a Success Plan?

We should start out by saying, there's **no such thing as a "perfect" success plan** and that's okay.

Every team does it a little differently. Every customer brings a unique set of goals, expectations, and challenges. The point isn't to check boxes or fill in templates, it's to build a clear path to renewal by anchoring everything you do to what the customer actually cares about, and what a CFO would sign off on if achieved.

A strong success plan ties every action, meeting, and recommendation back to business value. It creates shared ownership. When you ask something of the customer, whether it's changing a process, trialling a new feature, or looping in an exec sponsor - you can do so with confidence because it all ladders up to an agreed-upon outcome.

In a world where CS teams are constantly being pulled in different directions, **your success plan becomes your filter:**

- It helps you and the customer focus on what truly drives impact
- It empowers you to say no to distractions
- And most importantly, it becomes your case for renewal

When you are unsure if your success plan is strong, ask your customer this question:

"Now that you've joined as a customer, if we achieve the outcomes in this plan, does that give us a clear path to renewal?"

If the answer is no - you haven't gone deep enough.

Remember: the objective may not always be fully in your control. It's a business-level outcome that depends on many moving parts. But the leading indicators, the strategies, and the progress you track together - those are where you can influence and drive results.

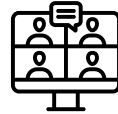
And when something isn't landing? The plan helps you uncover what's missing. It gives you the permission and the language to ask, "Is there something else we should be working toward?"

Who should be Involved?

A strong plan requires input from:

- **Senior decision-makers**, who can speak to strategic priorities
- **Operational contacts**, who understand what's working (and not) day to day
- **Front-line managers and users**, the ones that will be doing the work, and tracking progress

Talk to all key stakeholders, and look for alignment or gaps between them. That's often where your biggest opportunities lie.



When and How to Introduce a Success Plan

Success Plans are most powerful when they're introduced early in the partnership, ideally during the sales process or immediately after go-live. But the reality is, many teams find themselves deep into a customer motion before one is in place.

If you're mid-stream, halfway through rollout, chasing outcomes, or reacting to risk - it's not too late. In fact, that's often exactly when you need a success plan most.

Here's how to reframe it with your customer:

- Acknowledge the momentum: "We've made progress on a lot of things so far..."
- Then reset with intent: "But I want to make sure we're clear on what success looks like so we're focused on the right outcomes going forward."





Do the discovery:

When you introduce a success plan, whether early or mid-flight, your job is to first provide context: what the session is, why it matters, and how it will help align your partnership. From there, go deep with discovery questions focused on what the customer is trying to solve, their broader company goals, the role their team plays in achieving those goals, and where your product or service can make the biggest impact.

Asking the right questions is what transforms a success plan from a tactical checklist into a strategic asset. It's how you move from what the customer says they want to why it actually matters and who else in the business cares about it.

Don't stay surface-level. Stick to one topic at a time, and ask five questions around it - get to the WHY this is important. That's often how you uncover the real driver behind a request. You may start with "I want to reduce churn," but by going deeper, you learn it's actually about building a stronger case to the CFO for headcount or budget.

How to Structure a Success Plan That Actually Works

That's where the **OGSM Framework** comes in, a simple yet powerful structure that turns big-picture business goals into actionable strategies and measurable results.

The OGSM Framework

(Objective → Goals → Strategies → Measures)



There's a golden thread that links each strategy right up to hitting the objective at the top.

Why this framework matters:

Too many success plans are built around tasks, training, QBRs, meetings, but they don't connect to anything the business actually cares about. That creates busy work and distractions, not impact.

Breaking down the OGSM frame work:

Objective: The top-level business outcome (your customer's North Star)

This is the “why” behind everything. It should reflect something the business is focused on at the highest level, what gets reported to the board, or keeps the CEO up at night. Here are a few examples:

- It could be as simple as “increase NRR” or “decrease churn.”
- Or as macro as “triple in revenue,” “become profitable by year-end,” “expand into new markets,” or “reduce cost to serve by 30%.”
- Push your customer: “If you hit your GRR target, then what? What does that unlock?”

Think of the **objective** as the **top of the pyramid, the north star** that gives every other layer direction.

Here are some discovery questions to get started:

- “What’s your CEO’s top priority this year?”
- “What’s your company trying to achieve in the next 12-24 months?”
- “What’s the main theme in your All Hands or board updates?”
- Deeper question: “Why is this objective important and who else cares about it?”

Goals: What's preventing them from reaching the objective

These are the 2–3 biggest hurdles or pain points. Don't let this become a dumping ground of 10+ goals, too many goals dilute focus.

- Ask: "What are the specific challenges getting in the way?"
- Use data or gut instinct to identify focus areas: underperforming segments, lack of process, slow time-to-value, team misalignment.

This is where the conversation becomes actionable: "In order to hit that objective, we need to fix A, B, and C."

Here are some discovery questions to get started:

- "What's stopping you from hitting that objective?"
- "What KPIs are underperforming?"
- "Which teams or segments are struggling?"
- "What's the #1 lever you wish you could pull right now?"



Strategies: How you'll help address each goal

This is your shared game plan. **It's where your product or service starts to come in**, not as the center of the plan, but as the accelerator.

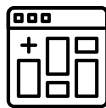
Good strategies are directional, not overly tactical. Examples:

- In order to "Move team from reactive to proactive"
- "Improve forecasting accuracy using real-time risk signals"
- "Reduce discounting by creating stronger upsell narratives"
- Ask: "What specific levers can we pull together to influence this?"

Each strategy may include a few specific actions (e.g., training, implementation, new reporting) but the strategy itself should stay focused on the change you're trying to make.

Here are some discovery questions to get started:

- "How do you currently manage x, y, or z processes today?"
- "Where do you feel the biggest process gaps are?"
- "How much change is the team ready for?"
- "What would you keep, stop, or start doing?"



Measures: How you'll track success at every layer

This is where success plans often fall short, they track lagging indicators (renewal, churn) without building leading indicators to show progress early.

You need layers of measurement:

- Did the strategy happen? (e.g. "Team trained by end of Q2")
- Are we seeing change? (e.g. "Discount rate dropped by 20%")
- Is it influencing the goal? (e.g. "Upsell rate increased by 10%")
- Is it contributing to the objective? (e.g. "NRR trending toward 120%")

If you don't know for months whether something is working, you're flying blind. The best success plans give you early signals to adapt and course-correct.

Here are some discovery questions to get started:

- "How will we know this is working?"
- "Can we track leading indicators?"
- "What does early progress look like?"
- "If the final outcome fails, can we still show influence?"

Putting It All Together

Picture it like a puzzle: every goal, strategy, and measure should fit cleanly under the objective. There should be a golden thread connecting every element. That thread is what earns buy-in across the org, from exec sponsors to end users.

Here's a quick way to stress test your plan:

- Can you link each strategy directly back to a goal and objective?
- Did you co-create the plan, or could you have written it alone? (If yes, start again.)
- Does every measure tell you something about whether you're on track?

The best success plans create shared accountability. Both you and your customer should have actions to complete, and both sides should feel ownership over the outcomes.



How you should be constructing a success plan:

Objective (North Star): XXXX		
Goal 1	Strategies 1. 2. 3.	Measure 1. 2. 3.
Goal 2	Strategies 1. 2. 3.	Measure 1. 2. 3.
Goal 3	Strategies 1. 2. 3.	Measure 1. 2. 3.



Final Thoughts

Don't build your plan around what your product can do, build it around what your customer needs. Then connect those needs to product use cases that make the path faster, easier, and more effective.

And once it's in place, don't let it sit still.

- **Review it monthly**
- Take a baseline, revisit your measures, and ask: **Are we seeing progress?**

If not, adjust your strategies or actions - don't wait until the renewal is at risk

