

# The CS Maturity Index: A Diagnostic Framework for Revenue-Generating Success Organizations

A structured diagnostic for measuring where your CS function stands — and the specific levers to advance each stage.

**Author** Jordan Devereaux    **Version** 1.0    **Audience** CS Leaders, Revenue Operations

---

## OVERVIEW

### What This Framework Is

The CS Maturity Index is a structured diagnostic for measuring where a Customer Success function stands across seven critical dimensions — and the specific levers to advance each stage toward revenue-generating maturity.

Most CS organizations know they should be driving revenue. Few have a clear picture of *where* they actually stand, *why* they're stuck, and *what specifically* to change. The CSMI answers all three questions.

---

## THE MODEL

# The Five Stages of CS Maturity

<p>STAGE 1</p> <p><b>Nascent</b></p> <p>Reactive, support-adjacent, commercially undefined</p>
<p>STAGE 2</p> <p><b>Emerging</b></p> <p>Organizational identity, basic operating model</p>
<p>STAGE 3</p> <p><b>Scaling</b></p> <p>Defined playbooks, metric accountability, NRR mandate</p>
<p>STAGE 4</p> <p><b>Revenue-Aligned</b></p> <p>Co-owns expansion, commercial muscle embedded</p>
<p>STAGE 5</p> <p><b>Revenue-Generating</b></p> <p>Profit center, strategic differentiator, GTM-integrated</p>

**Stage 1 — Nascent.** CS is reactive, support-adjacent, and commercially undefined. Revenue impact is incidental. The function exists to handle escalations and renewals no one else wants.

**Stage 2 — Emerging.** CS has an organizational identity and a basic operating model. Proactive engagement is beginning but uneven. Revenue contribution is recognized but not yet measured or owned.

**Stage 3 — Scaling.** CS operates with defined playbooks, metric accountability, and a mandate to influence Net Revenue Retention. Commercial conversations are starting but CSMs lack consistent structure or confidence to execute them.

**Stage 4 — Revenue-Aligned.** CS owns or co-owns expansion motions. Commercial capability is embedded in the hiring profile and compensation design. NRR is a primary KPI with predictable CS contribution.

**Stage 5 — Revenue-Generating.** CS is a recognized profit center. CS-sourced revenue is tracked, forecast, and reported. The function is a strategic differentiator, fully integrated into go-to-market planning.

---

## DIAGNOSTIC

# The Seven Diagnostic Pillars

The CSMI assesses maturity across seven dimensions. Each pillar can advance independently, but overall advancement is constrained by the weakest pillar.

PILLAR 1

# Organizational Mandate

How CS is chartered, positioned, and funded within the organization

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 1</b> <b>Nascent</b>	CS sits under Support or CX with no commercial charter. Budget is a cost line item. Success is measured by ticket response time or NPS.	<ul style="list-style-type: none"><li>→ Write a CS charter defining revenue expectations</li><li>→ Separate CS from Support organizationally</li></ul>
<b>STAGE 2</b> <b>Emerging</b>	CS has its own function and leader, but commercial accountability is informal. NRR is tracked but not owned.	<ul style="list-style-type: none"><li>→ Assign NRR as a CS-owned metric</li><li>→ Give the CS leader board-level visibility on retention outcomes</li></ul>
<b>STAGE 3</b> <b>Scaling</b>	CS leader has a seat at the revenue leadership table. NRR is on the CS scorecard alongside retention-based metrics.	<ul style="list-style-type: none"><li>→ Add GRR and expansion ARR separately to the CS scorecard</li><li>→ Tie CS headcount budget to NRR contribution</li></ul>
<b>STAGE 4</b> <b>Revenue-Aligned</b>	CS owns a defined share of NRR. Expansion pipeline is tracked separately from Sales pipeline. CS P&L is visible.	<ul style="list-style-type: none"><li>→ Create a CS P&amp;L view</li><li>→ Fund CS headcount growth from revenue generated, not headcount ratios</li></ul>

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 5</b> <b>Revenue-Generating</b>	CS is a profit center with its own revenue targets and a forecast that feeds the board report. CS-sourced ARR is a company metric.	<ul style="list-style-type: none"><li>→ CS leader presents revenue forecast in board meetings</li><li>→ CS-sourced pipeline tracked and attributed in CRM</li></ul>

PILLAR 2

# Coverage Model & Segmentation

*How customers are tiered, assigned, and served*

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 1</b> <b>Nascent</b>	All customers treated equally. Assignment based on geography or availability. No formal segmentation exists.	<ul style="list-style-type: none"><li>→ Implement ARR-based tiering (Enterprise, Mid-Market, SMB)</li><li>→ Define coverage ratios per tier</li></ul>
<b>STAGE 2</b> <b>Emerging</b>	2–3 tiers exist but engagement models and CSM:account ratios are inconsistent within tiers.	<ul style="list-style-type: none"><li>→ Define engagement SLAs per tier</li><li>→ Set and enforce CSM:account ratios by segment</li></ul>
<b>STAGE 3</b> <b>Scaling</b>	Segmentation is risk-adjusted, not purely ARR-based. Digital or scaled coverage exists for low-ARR segments.	<ul style="list-style-type: none"><li>→ Layer health-score risk weighting on top of ARR segmentation</li><li>→ Introduce digital CS for long-tail accounts</li></ul>
<b>STAGE 4</b> <b>Revenue-Aligned</b>	Coverage model is capacity-planned and weighted by expansion potential. CSMs have ideal book profiles.	<ul style="list-style-type: none"><li>→ Model CSM capacity by growth potential, not just ARR</li><li>→ Run quarterly book rebalancing aligned to account scoring</li></ul>
<b>STAGE 5</b> <b>Revenue-Generating</b>	Coverage model is dynamic. CS resources flex toward highest-growth, highest-expansion-readiness accounts.	<ul style="list-style-type: none"><li>→ Implement predictive account scoring</li><li>→ CSM time allocation informed by expansion probability, not ARR band</li></ul>

PILLAR 3

# Commercial Motion

*CS's role in driving expansion, upsell, and renewal*

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 1</b> <b>Nascent</b>	CS has no formal commercial role. Renewals are owned by Sales. Expansion is accidental and untracked.	<ul style="list-style-type: none"><li>→ Assign CS ownership of renewal in at least one segment</li><li>→ Track churn attribution to CS actions or inaction</li></ul>
<b>STAGE 2</b> <b>Emerging</b>	CS manages renewals in some segments but expansion is passed to Sales. CSMs identify opportunities but don't pursue them.	<ul style="list-style-type: none"><li>→ Train CSMs on expansion identification and qualification</li><li>→ Build a warm handoff playbook to the Sales team</li></ul>
<b>STAGE 3</b> <b>Scaling</b>	CS identifies and qualifies expansion. Owns small upsells below a revenue threshold. CS-Qualified Leads (CSQLs) are tracked.	<ul style="list-style-type: none"><li>→ Give CS a quota for expansion below a defined ARR threshold</li><li>→ Make CSQL a formal, measured metric</li></ul>
<b>STAGE 4</b> <b>Revenue-Aligned</b>	CS co-owns expansion with Sales on named accounts. CSM compensation includes an expansion variable component.	<ul style="list-style-type: none"><li>→ Redesign CSM comp to include 20–30% variable tied to NRR</li><li>→ Run joint QBRs between CSMs and AEs on key accounts</li></ul>
<b>STAGE 5</b> <b>Revenue-Generating</b>	CS independently closes expansion within a defined ARR band. CS sources net-new revenue through referrals.	<ul style="list-style-type: none"><li>→ CS carries a full NRR quota including contraction offset and gross expansion</li><li>→ Referral pipeline tracked and incentivized</li></ul>

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
		separately

PILLAR 4

## Data & Intelligence

Health scoring, early warning, and predictive capability

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 1</b> <b>Nascent</b>	No health scoring. Churn is identified reactively after customers signal distress through support tickets or escalations.	→ Build a basic 3-factor health score: product usage, support volume, relationship sentiment
<b>STAGE 2</b> <b>Emerging</b>	Health scores exist but are manually updated, infrequently refreshed, or ignored by CSMs in practice.	→ Automate health score refresh → Train CSMs to act on score changes within 48 hours
<b>STAGE 3</b> <b>Scaling</b>	Automated health scoring with leading indicators. Risk flags trigger assigned playbooks. CSMs act on data, not just intuition.	→ Add engagement breadth and NPS/CSAT trend as additional health inputs → Surface health score changes directly in CSM workflow tools
<b>STAGE 4</b> <b>Revenue-Aligned</b>	Predictive churn models with 60–90 day forecast accuracy. Expansion signals tracked separately from risk signals.	→ Build an expansion health score distinct from the churn risk score → Alert CSMs to accounts showing growth readiness signals
<b>STAGE 5</b> <b>Revenue-Generating</b>	AI-augmented predictions inform both risk mitigation and growth targeting. Intelligence is embedded	→ Operate from a unified revenue intelligence dashboard → Predictions inform capacity planning and

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
	in CRM workflow, not a separate tool.	book assignments

PILLAR 5

# Playbooks & Execution

*How CS engages, at what triggers, and with what outcomes*

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 1</b> <b>Nascent</b>	No formal playbooks. CSM judgment drives all engagement decisions. Outcome consistency across the team is low.	→ Document the three most common scenarios: onboarding, QBR, at-risk
<b>STAGE 2</b> <b>Emerging</b>	Playbooks exist but live outside the CSM workflow. Adoption is inconsistent. Managers can't track completion.	→ Embed playbook steps in the CS platform as executable tasks → Require manager review for critical playbook stage completion
<b>STAGE 3</b> <b>Scaling</b>	Trigger-based playbooks running automatically. Playbook effectiveness measured by conversion or retention outcome, not just completion.	→ A/B test playbook variations on similar account cohorts → Retire underperforming plays quarterly based on outcome data
<b>STAGE 4</b> <b>Revenue-Aligned</b>	Playbooks differentiated by segment, lifecycle stage, and commercial intent. Expansion playbooks are distinct from retention playbooks.	→ Build expansion-specific plays: license optimization, feature upsell, cross-sell → Tie play completion to CSQL conversion rate

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 5</b> <b>Revenue-Generating</b>	Playbooks continuously optimized. Personalization at the account level is possible. Outcomes predicted before execution begins.	<ul style="list-style-type: none"><li>→ Run monthly effectiveness reviews with revenue attribution</li><li>→ Deprecate low-performing plays based on pipeline contribution</li></ul>

PILLAR 6

# Talent & Capability

Skills, hiring profile, and compensation design

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 1</b> <b>Nascent</b>	CSMs hired from Support or generic Account Management. Commercial skills absent from job descriptions and hiring criteria.	<ul style="list-style-type: none"><li>→ Rewrite the CSM job description to include commercial acumen</li><li>→ Add a commercial scenario to the interview process</li></ul>
<b>STAGE 2</b> <b>Emerging</b>	Some commercial aptitude expected but training is informal. Comp is salary-only with no variable tied to revenue outcomes.	<ul style="list-style-type: none"><li>→ Build a CS skills matrix</li><li>→ Add structured commercial training to onboarding; introduce variable comp</li></ul>
<b>STAGE 3</b> <b>Scaling</b>	Formal CSM career ladder in place. Variable comp tied to NRR. Ongoing enablement program exists.	<ul style="list-style-type: none"><li>→ Hire CSMs with sales backgrounds for the Enterprise segment</li><li>→ Create a CSM → Account Manager promotion path</li></ul>
<b>STAGE 4</b> <b>Revenue-Aligned</b>	CSM profile is a consultative seller. Comp includes a meaningful variable. Managers coach explicitly to commercial outcomes in 1:1s.	<ul style="list-style-type: none"><li>→ Add discovery, negotiation, and executive presence training</li><li>→ Make commercial skill a formal performance review criterion</li></ul>
<b>STAGE 5</b> <b>Revenue-Generating</b>	CSM commercial strength is comparable to inside sales. CS leaders build and measure a revenue	<ul style="list-style-type: none"><li>→ Develop a CS-specific revenue enablement curriculum</li></ul>

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
	culture. Manager effectiveness measured by team NRR.	→ Measure manager effectiveness by team NRR attainment, not activity metrics

PILLAR 7

# Cross-functional Integration

Alignment with Sales, Product, Finance, and Marketing

STAGE	WHAT IT LOOKS LIKE	ADVANCEMENT LEVERS
<b>STAGE 1</b> <b>Nascent</b>	CS operates in functional isolation. Handoffs from Sales are informal. Product rarely receives structured CS feedback.	<ul style="list-style-type: none"><li>→ Establish a Sales-to-CS handoff template</li><li>→ Set up a monthly CS-Product feedback loop with a defined format</li></ul>
<b>STAGE 2</b> <b>Emerging</b>	CS-Sales handoff process exists but is inconsistently followed. CS data is not visible in Sales systems. No shared metrics.	<ul style="list-style-type: none"><li>→ Create shared CRM fields visible to both Sales and CS</li><li>→ Begin joint pipeline review meetings for renewal accounts</li></ul>
<b>STAGE 3</b> <b>Scaling</b>	CS shares NRR data with Finance. CS input shapes renewal forecasting. CS leader participates in revenue forecast calls.	<ul style="list-style-type: none"><li>→ CS attends monthly forecast calls</li><li>→ CS data feeds into financial planning for the following quarter</li></ul>
<b>STAGE 4</b> <b>Revenue-Aligned</b>	CS-Sales pod model or defined co-selling motion on named accounts. CS roadmap input has a formal mechanism to influence Product.	<ul style="list-style-type: none"><li>→ Co-locate CS and AE on named accounts</li><li>→ CS feedback loop has a documented product influence process</li></ul>
<b>STAGE 5</b> <b>Revenue-Generating</b>	CS is embedded in GTM planning. CS data informs ICP definition, pricing design, and sales motion. CS win/loss shapes positioning.	<ul style="list-style-type: none"><li>→ CS leader co-authors the annual GTM plan</li><li>→ CS win/loss analysis informs positioning, packaging, and sales enablement</li></ul>

---

## APPLICATION

# How to Use the CSMI

1

### Run the Diagnostic Assessment

Score your CS function on each of the seven pillars using the stage descriptions above. Score based on consistent, measurable behavior — not best-case examples or stated intent. Have at least two internal reviewers score independently, then reconcile.

2

### Identify Your Dominant Stage

Average your seven pillar scores. Your dominant stage is where the majority of pillars cluster. The average is directional; the distribution matters more than the mean.

3

### Find Your Constraint

The pillar where you score lowest relative to your average is your constraint. Advancing the weakest pillar typically unlocks progress across adjacent pillars. A Stage 4 Commercial Motion built on Stage 2 Data & Intelligence will stall.

4

### Select Two or Three Levers

For each pillar below your target stage, identify the two or three highest-leverage advancement levers from the tables above. Avoid attempting to advance all pillars simultaneously — diffusion slows everything.

5

### Define a 90-Day Target Stage

Describe what "one stage better" looks like in concrete, measurable terms for your priority pillars. Assign an owner and a milestone for each lever. Revisit and re-score at 90 days.

---

## TOOL

# The CSMI Scorecard

Use this scorecard to capture your diagnostic assessment, assign owners, and track 90-day progress.

PILLAR	CURRENT STAGE	TARGET STAGE	PRIORITY LEVERS	OWNER	90-DAY MILESTONE
Organizational Mandate	<input type="text"/>	<input type="text"/>			
Coverage & Segmentation	<input type="text"/>	<input type="text"/>			
Commercial Motion	<input type="text"/>	<input type="text"/>			
Data & Intelligence	<input type="text"/>	<input type="text"/>			
Playbooks & Execution	<input type="text"/>	<input type="text"/>			
Talent & Capability	<input type="text"/>	<input type="text"/>			
Cross-functional Integration	<input type="text"/>	<input type="text"/>			
<b>CSMI Score (average)</b>	<input type="text"/>	<input type="text"/>			

MEASUREMENT

## Key Metrics by Stage

STAGES 1-2

**Nascent → Emerging**

- Gross Revenue Retention (GRR)

- Churn Rate by Segment
- Time to First Value (TTFV)
- Onboarding Completion Rate
- Health Score Coverage %

### STAGE 3

#### Scaling

- Net Revenue Retention (NRR)
- CS-Qualified Leads (CSQLs)
- Playbook Execution Rate
- At-Risk Account Resolution Rate
- Stakeholder Contacts per Account

### STAGE 4

#### Revenue-Aligned

- Expansion ARR (CS-sourced)
- CSM Quota Attainment
- Renewal Forecast Accuracy
- NRR by CSM Book
- CSQL-to-Opportunity Conversion Rate

### STAGE 5

#### Revenue-Generating

- CS-Sourced Pipeline as % of Total
- CS Revenue Contribution vs. Quota
- NRR Forecast Accuracy (target:  $\pm 5\%$ )
- Referral-Sourced ARR
- CS P&L (Revenue  $\div$  CS Investment)

## Common Failure Patterns

These patterns explain why CS organizations get stuck between stages — and why adding metrics or training alone rarely unsticks them.

### The Metrics Trap

Organizations add NRR to the CS dashboard without changing the underlying mandate, skills, or compensation. CSMs are accountable to a number they don't have the tools, authority, or comp structure to influence. Frustration replaces ownership.

→ **Mandate follows metric. Before assigning a revenue metric to CS, confirm the comp model, coverage model, and commercial motion are calibrated to make it achievable.**

### The Playbook Graveyard

Playbooks are created in an offsite, documented in Notion, referenced in onboarding, and never operationalized. CSMs rely on judgment because the plays live outside their daily workflow. Execution rates are unmeasured.

→ **A playbook that isn't embedded in the CS platform as executable tasks isn't a playbook — it's a document. Measure adoption, not authorship.**

### The Segmentation Mismatch

Coverage models are ARR-weighted when they should be growth-potential-weighted. The largest accounts by current ARR absorb the most CSM time. The accounts most likely to expand receive scaled or digital coverage.

→ **Build a secondary expansion potential score. Run a coverage model analysis that surfaces high-growth accounts in low-touch tiers. Rebalance accordingly.**

## The Commercial Avoidance Cycle

CSMs avoid commercial conversations because they perceive it as inconsistent with the trusted advisor relationship. Without deliberate training and comp reinforcement, commercial avoidance becomes cultural norm.

→ The trusted advisor and the commercial conversation are not in conflict when the CSM is recommending something genuinely valuable. Fix the skill gap, not the mindset. Make commercial role-play normal in team meetings.

## The Reactive Data Trap

Health scores exist but are used to explain churn after it happens rather than prevent it before it does. The underlying data is backward-looking when the organization needs it to be forward-looking.

→ Separate lagging indicators (health maintenance) from leading indicators (churn prediction, expansion readiness). Measure the model by whether CSMs acted on it, not whether it was accurate after the fact.

---

### FOUNDATION

## Design Principles Behind the CSMI

1

### Revenue is the outcome, not the activity.

The framework measures commercial impact, not commercial activity. CSMs calling customers is not the same as CSMs driving NRR. Activity metrics are proxies; NRR is the signal.

2

### Constraint-first advancement.

Progress is determined by the weakest pillar, not the strongest. Organizations that over-index one dimension without advancing others hit a ceiling. Data without playbooks is wasted. Playbooks without commercial motion close loops that don't generate revenue.

---

3

**Behavior change requires system change.**

Advancing from one stage to the next requires changes to compensation, tooling, or organizational structure — not training or messaging alone. If the system doesn't change, behavior reverts.

---

4

**Segmentation before playbooks.**

You cannot build effective engagement plays for customers you haven't differentiated. Coverage model maturity is a structural prerequisite for playbook maturity.

---

5

**Data must be actionable.**

Health scores that CSMs cannot act on within a defined timeframe are a diagnostic exercise, not an operating system. If the data doesn't change CSM behavior, the data investment is not generating return.

---

6

**The CS leader is the rate-limiting factor.**

Organizational mandate, cross-functional integration, and talent model cannot advance without a CS leader who has credibility in revenue conversations. CS leader development is an advancement lever for every pillar above Stage 2.

---