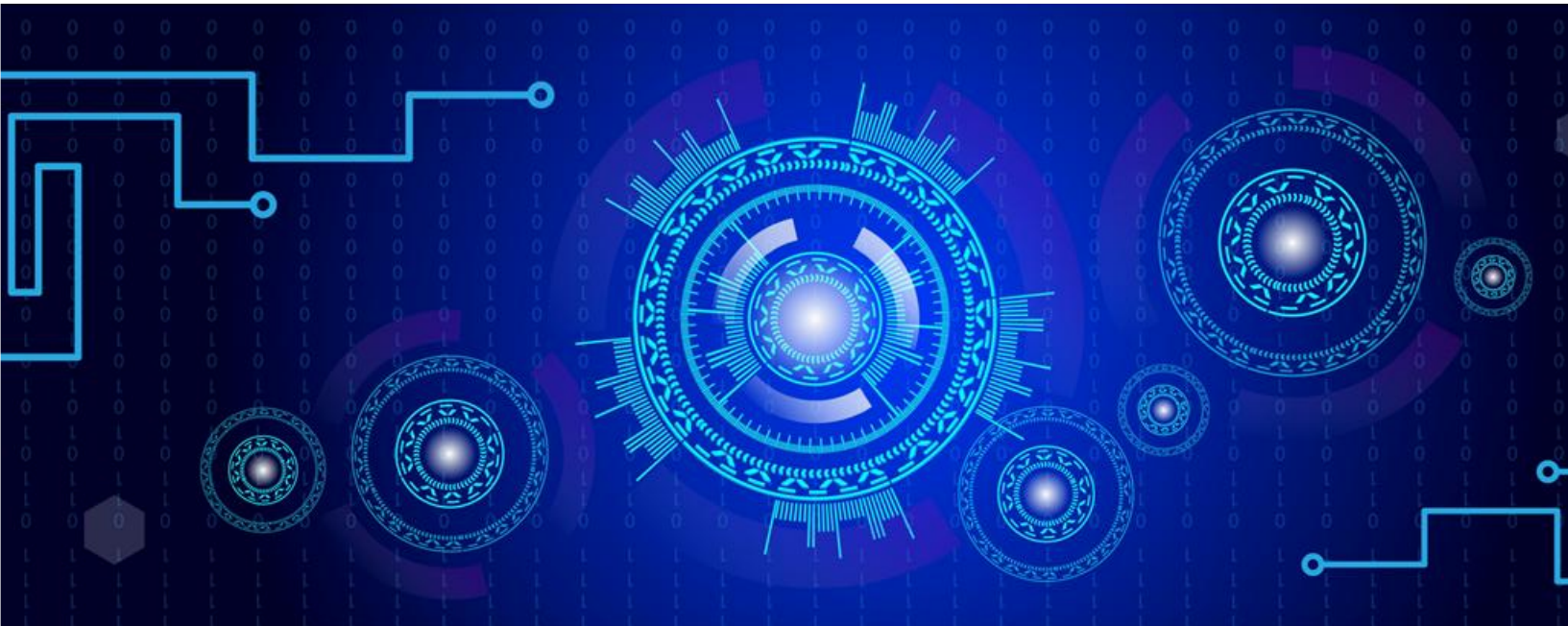




Customer Success Management:

An ITIL[®]-Aligned Practice Guide



Building, governing, and scaling Customer Success as a managed practice

Natalya Cherepanova

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Preface

Customer Success Management (CSM) has matured into a distinct management discipline as cloud-based solutions and subscription business models have become mainstream. Like many emerging practices, however, CSM evolved largely through experimentation and local adaptation. Organizations responded to new market expectations by developing post-sales approaches intended to sustain adoption, realize value, and support renewals – often without shared definitions, a common structure, or a clearly articulated governance model.

I entered the Customer Success domain from an Information Technology Service Management (ITSM) background. At that stage, Customer Success was not yet articulated as a formally defined discipline, so my work began with direct operational responsibility – applying industry playbooks, established techniques, and professional judgment in real-world environments. Over time, a pattern became evident: approaches that proved effective in one organizational context did not consistently deliver the same results in another. To understand these inconsistencies, I moved from practice to structured analysis. The available literature provides valuable perspectives, but tends toward either high-level principles or tactical playbooks, leaving a gap for practitioners who need an integrated management system they can govern and scale. Challenges in terminology and conceptual alignment further highlighted this fragmentation: identical terms were used for different practices, while similar practices were described using different language.

This gap led me to ITIL as a widely recognized service management framework. While ITIL addresses customer experience and value creation, it does not explicitly describe the end-to-end set of activities many organizations perform under the label of Customer Success. At the same time, ITIL provides a governance-oriented structure that can describe management capabilities in a systematic and comparable way. This inspired the central idea of this guide: to describe Customer Success Management using the logic and structure of an ITIL management practice.

In ITIL terms, a management practice is defined as "a set of organizational resources and capabilities used to perform work and achieve objectives" (PeopleCert, 2026). Customer Success aligns with this definition: it has a defined purpose, measurable objectives, and dedicated resources to achieve them.

This Practice Guide attempts to provide a coherent and transferable structure for Customer Success Management. It is intended to support organizations at different stages of Customer Success maturity – from those establishing the foundations to those optimizing a mature practice.

Who This Guide Is For

This guide is for people responsible for building, governing, assessing, or improving Customer Success as an organizational capability.

It is written for environments where Customer Success can no longer depend on individual heroics, informal relationships, or locally invented ways of working. If your organization needs clearer ownership, more consistent lifecycle execution, better renewal-risk visibility, stronger value-realization discipline, or a more scalable post-sales operating model, this guide provides a structured way to think through the work.

It is especially relevant for:

Customer Success leaders who need to define the role, scope, governance, metrics, and operating model of Customer Success in a way that can scale beyond individual experience and personal judgment.

Customer Success Operations and Revenue Operations professionals who are responsible for translating Customer Success strategy into processes, data structures, health models, tooling requirements, dashboards, playbooks, and operating routines.

Post-sales leaders across Support, Services, Account Management, and Implementation who need a shared model for how Customer Success fits into the broader customer lifecycle and connects with their own functions at every stage.

IT service management and ITIL practitioners who understand value, governance, service consumption, and continual improvement, and want to apply that logic to Customer Success in external customer environments.

Consultants, advisors, and organizational design professionals who support companies in structuring, assessing, or improving Customer Success capabilities and need a coherent reference model for discovery, facilitation, and capability development.

Product Development, Product Operations, and adoption leaders who need to connect product capabilities, use cases, customer outcomes, value evidence, and engagement models into a more systematic approach to value realization.

Senior Customer Success Managers who want to understand the wider operating system behind their role and prepare for leadership, operations, or practice-development responsibilities.

This guide is most useful when Customer Success already exists, but its operating model is becoming difficult to manage. Typical signs include unclear ownership between teams, inconsistent handoffs, fragmented playbooks, unreliable health scores, weak escalation paths, limited evidence of customer value, or difficulty explaining how Customer Success contributes to customer retention and business growth.

This guide is not a collection of basic CSM scripts, email templates, or generic customer meeting tips. It is not a plug-and-play blueprint. Customer Success practices must be adapted to the

organization's products, customer segments, commercial model, maturity, and available capabilities.

The purpose of this guide is to provide a structured management-practice model that helps organizations design, assess, and improve Customer Success deliberately – with clearer governance, stronger traceability, and a more disciplined connection between customer value and business outcomes.

How to Use This Guide

This guide covers the Customer Success Management practice from foundational concepts through governance, process design, organizational structures, information and technology, partner dependencies, capability assessment, and practice development.

It is not a ready-made blueprint and does not prescribe a single correct implementation. The model is designed to be adapted to the organization's current operating context and developed progressively as the practice matures.

You do not need to read the guide sequentially. Use the structure shown in Figure 0-1 to navigate to the part of the practice most relevant to the work you are doing.

If you are unfamiliar with ITIL, **Chapter 1** provides a brief introduction to the concepts on which the structure of this guide is based. Readers already familiar with ITIL may move directly to **Chapter 2**.

Chapter 2 defines the Customer Success Management practice: its purpose, scope, Practice Success Factors, and measurement model.

Chapters 3 through 6 examine the practice through the four ITIL service management dimensions:

- **Value Streams and Processes** (Chapter 3) – the core CS processes, their activities, inputs, outputs, and contribution to broader value streams
- **Organizations and People** (Chapter 4) – roles, competency profiles, organizational models, cross-functional interfaces, and team enablement
- **Information and Technology** (Chapter 5) – information flows, Customer Health Score, tooling, automation, and AI governance
- **Partners and Suppliers** (Chapter 6) – third-party dependencies and partner ecosystem design

Chapter 7 provides the capability assessment and development model. If you are unsure where to begin improving an existing CS practice, this is the most useful entry point: assess where the practice currently stands, identify the most important gaps, and use the relevant chapters of the guide to support development toward the next target state.

Chapter 8 brings the components together into an integrated set of recommendations for practice success and helps establish priorities across the practice.

The **appendices** provide reference and implementation materials. Their ready-to-use, editable, and printable versions are available via the download link at the beginning of that section.

The same principles that underpin continual improvement apply to using this guide: **start where you are, progress iteratively with feedback, and keep it simple and practical**. You may use only the parts relevant to your current needs and return to others as the practice develops.

Customer Success Management: An ITIL-Aligned Practice Guide

Figure 0-1 CS Management Practice Guide: Document Structure and Component Overview

