

CUSTOMER SUCCESS MEETUP

The biggest unaffiliated customer success community in the world,
built by the community, for the community.
We have over 5,000 people participating in it
and run events coast to coast in SF and NYC.

CUSTOMER
SUCCESS
WEEK

THANK YOU FOR JOINING US AT

MOMENT 2026

THESE SESSION MATERIALS AND ACCOMPANYING VIDEO
RECORDINGS ARE FOR ATTENDEES AND MEMBERS

**CUSTOMER
SUCCESS
WEEK**

TITLE PARTNER



Planhat

PRESENTING PARTNER



**CUSTOMER
SUCCESS
WEEK**

MOMENT ²⁰/₂₆

Your hosts



John Gleeson

Founder & General Partner,
SuccessVP



Junan Pang

SVP of Solutions,
Deployment, and Success at
Fin



Monica Perez

Global Head of Customer
Success, Lovable

CUSTOMER SUCCESS MEETUP

Values



In Person



**Community
Driven**



**Content from
Practitioners**

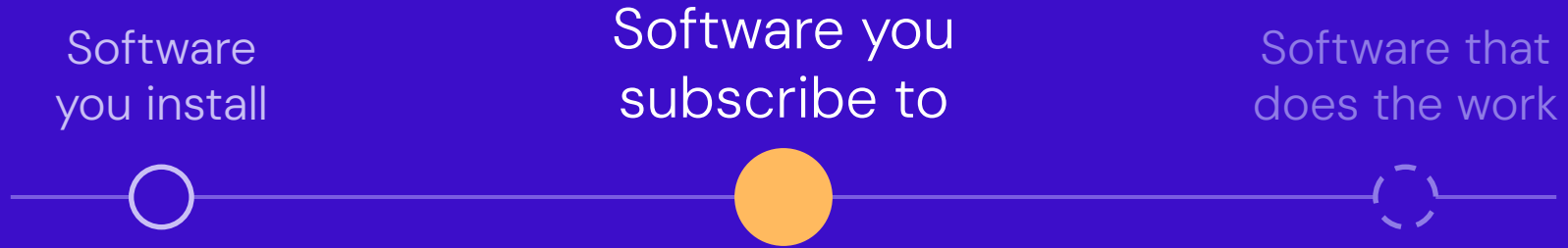


Inclusive

Does your job look different today
than it did a year ago?

Something fundamental has
changed.

Where customer success came from

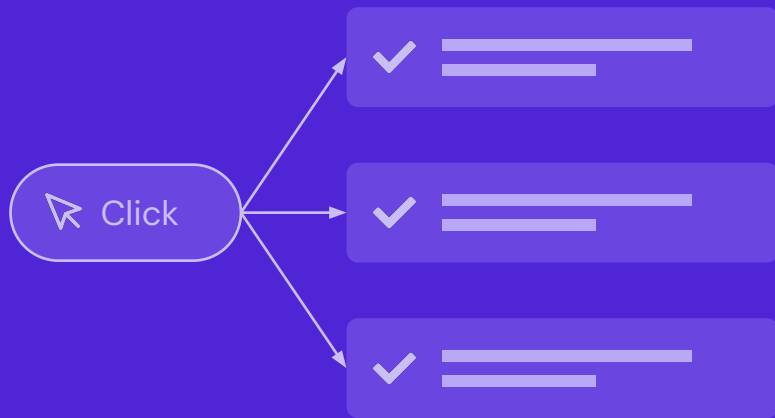


The vendor has to earn the customer every year.

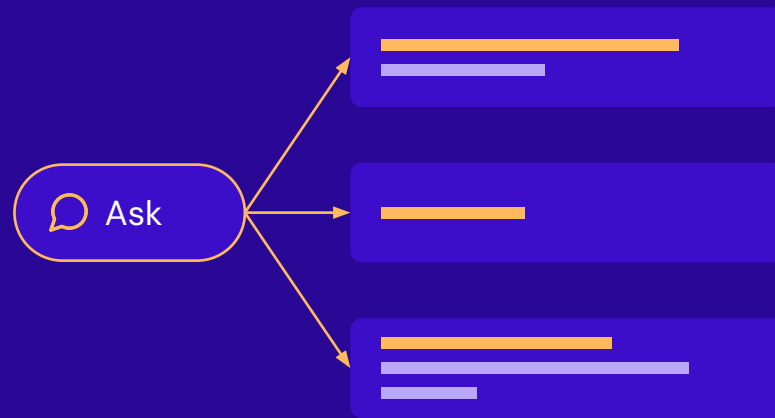
Customer success is born.

Then and now

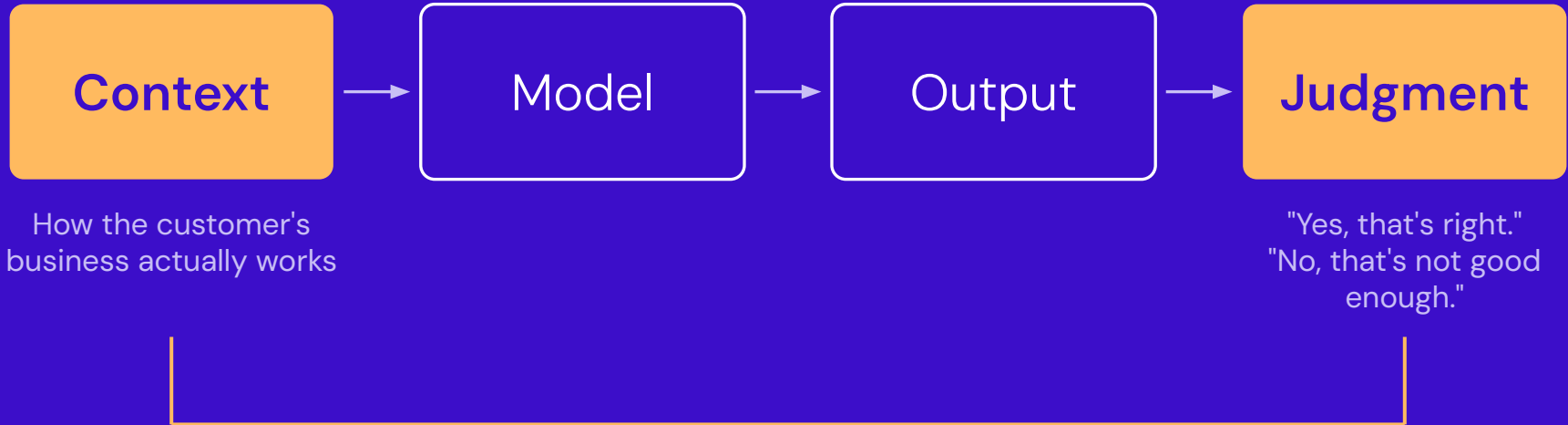
THEN Same input, same output.



NOW Same question, different answers.



What makes the product work



That's the work.

SAAS WORLD

Helping the customer use the product.

SAAS WORLD

Helping the customer use the product.

AI WORLD

Helping the
product do the work.

The other 90%

5–10%

of the possible value, in use today

Dario Amodei, CEO, Anthropic, September 2026



REAL COMPANY · REAL WORKFLOW · REAL DATA · REAL CONSTRAINTS · REAL PEOPLE

As intelligence gets cheaper,

**customer context gets more
valuable.**

They're all circling the same idea

THE AI LABS

~200 → 5,200+

US forward-deployed engineer job postings, 2024 vs. Jan–Jul 2026.

Anthropic and OpenAI each launched a company to put engineers inside their customers.

Lightcast · lab announcements, May 2026

STARTUPS

“Founders want a forward-deployed engineer before a salesperson.”

YC Summer 2026 Demo Day

INVESTORS

“...customer service may end up being **the ultimate differentiator.**”

Alfred Lin, Sequoia

“[AI] is profoundly inflationary for businesses whose moats are **institutional trust, deep customer relationships, and operational knowledge...**”

Hemant Taneja, General Catalyst

Making it work for customers

And who's spent the last two
decades doing exactly that?

You have.

Figure out how a company actually works

Get people to change behavior

Earn trust

Make something complicated useful

Translate between the product and the customer

Soft skills

The titles are changing.

Agent Success Architect

AI Deployment Manager

Outcome Engineer

Forward-Deployed Engineer

CUSTOMER
SUCCESS
WEEK

This is our

MOMENT



JUNAN PANG · FIN

Reinventing an existing
software company around AI



MONICA PEREZ · LOVABLE

Building an AI-native customer
organization from scratch

What does customer success become now?

\$0.99

per outcome. No outcome, no charge.



“AI is a convergent force”

– Des Traynor, Co-founder Fin (Intercom)



AI is a convergent force

Unified Engagement Motion

Solutions, Deployment, and Success (SDS) all operate together

Never stop climbing the hill

Go-live is just the start. We never stop optimizing performance for customers.

Required: all the skills

Credibility requires technical, change, relationship, and commercial skills



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Building from scratch at Lovable

WHAT WE THREW OUT

~~Onboarding programs for a stable product~~

WHAT REPLACED IT

→ Building alongside the customer, on a product that changes under us



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WHAT WE THREW OUT

~~Onboarding programs for a stable product~~

~~Focus on adoption~~

WHAT REPLACED IT

→ Building alongside the customer, on a product that changes under us

→ Focus on indispensability



Building from scratch at Lovable

WHAT WE THREW OUT

~~Onboarding programs for a stable product~~

~~Focus on adoption~~

~~Be a product adviser~~

WHAT REPLACED IT

→ Building alongside the customer, on a product that changes under us

→ Focus on indispensability

→ Be a transformation partner

**This is our moment—
to write the next playbook.**

Today's speakers

Kaveh Rostampor

Planhat

Daryl O'Genski

Webflow

Ian Russell

HappyRobot

Amir Ghowsi

Cora.ai

Danielle Buis

Pylon

Josh Schachter

Gainsight

Kelsey Gach

Push Operations

Anton Kravchenko

Sonora

Junan Pang

Fin

Malin Skoglund

Planhat

Linda Lin

Juicebox.ai

Kelly Bray

Vanta

Laurence Leong

TPG

Nick Kim

Upfront Ventures

Cameron Monfared

Ramp

Ruth Frantz Gale

Vanta

Sam Morovati

GitHub

John Gleeson

SuccessVP

Tom Ronen

Harvey

Jess Simon

Clay

Katie Palmer

MongoDB

Bhusha Mehta

GitHub

Julia Godinho

Fin

Emily Man

Primary Ventures

YouMon Tsang

ChurnZero

Nicole Tettke

Centralize

CS Talent Playbook

Swati Garg, Parul Bhandari,
Elizabeth Blass, Ejieme Eromosele,
Julie Fox, Kristen Hayer

Christina Meng

OpenAI

Vedant Suri

General Catalyst

Gia Scinto

The Cole Group

Chase Wittingham

Artisinal Talent

June Zhang

HubSpot Ventures

Max Elster

Minoa

Doug Gallagher

Snowflake

Coco Janze

Fin

Joseph Yang

Gamma

Nick Taylor

Granola

Will Ji

HeyGen

Sam Wener

Notion

Will Patterson

Genera

Bradford Jordan

Baseten

Lauren Everett

Xplor Technologies

Gozde Gorce

The Success Path

Alek Toumert

Fin

Rob Hardy

Anthropic

Shy Goodarzi

Flock Safety

Sunil Joseph

OpenRouter

Hana Yen

Crosby

Dave West

OnRamp

Holly Goodliffe

Lovable

Monica Perez

Lovable

Your day is in the Gradual app.

- The full agenda for all four stages
- Every speaker and every room
- Find, message, and connect with fellow attendees



QR code on your badge

Four stages today

01

PLANHAT MAIN STAGE

The big ideas and
the big panels

You are here

02

SUCCESS STAGE

Deeper and more
tactical

This floor – down the hall

03

OUTCOMES STAGE

Deeper and more
tactical

This floor – down the hall

04

CAREER GROWTH STAGE

Mentorship, talent
and your next
move

Downstairs

FOOD

Gallery 1 (downstairs)

COFFEE

Planhat Coffee Lab

WI-FI

Network: Moment26
P/W: Planhat26

Full agenda and room map in the Gradual app

On this stage today

MORNING

- 9:15** **Commercial Functions Are Collapsing**
Kaveh Rostampor, Planhat
- 10:00 **Creating an Agentic Ecosystem**
OpenRouter
- 10:30 **Post-Sales Agent Operating System**
Vanta
- 11:00** **Building the FDE Function at Anthropic**
Anthropic
- 11:30** **Built Native, Rebuilt at Scale**
HeyGen · Flock Safety · Cora

AFTERNOON

- 1:15** **AI-Native Post-Sales in Risk-Sensitive Businesses**
Ramp · Harvey · MongoDB · Planhat
- 1:45** **The Centaurs of Scale**
Lovable
- 2:30 **Lessons Learned: 2 Years of Building AI Champions**
OpenAI
- 3:00 **2026 Market Perspective: VC POV**
General Catalyst · Primary · Upfront · HubSpot Ventures
- 3:45 **Leading Without a Script**
GitHub
- 4:30** **What AI-Native Services Teach Us About CS**
Genera · Crosby

Highlighted: the sessions that pick up this morning's ideas. 4:55 closing remarks.

Across the building

SUCCESS STAGE

1:15

Judgment in Forward Deployment

Fin

3:00

Putting a Value on Outcomes

Minoa · Snowflake

3:45

[ChurnZero session]

ChurnZero

OUTCOMES STAGE

10:00

Founding Post-Sales

Ian Russell

11:30

The Customer Org After Agents

Pylon

1:45

Where AI Helps and Where It Hurts

OnRamp · Push Operations · Xplor

2:30

The State of Talent

The Cole Group · Artisinal Talent · TPG

CAREER GROWTH STAGE

10:00

Mentorship Program Kickoff

Coco Janze · Gozde Gorce

[1:15]

The CS Talent Playbook

Six co-authors

[More sessions: confirm]

Full agenda in the Gradual app

TITLE PARTNER



Planhat

PRESENTING PARTNER



Thank you, Gold partners



Thank you, Silver partners



How can I help
you?

What a day.

4 STAGES · 50+ SPEAKERS · ONE COMMUNITY

This is our

MOMENT

THANK YOU FOR JOINING US

SAVE THE DATE

MOMENT 2027

Tuesday, October 5, 2027

Convene, 225 Liberty · Same place. Same week.

UNTIL THEN



Keep the
conversation going
in the Community



SCAN FOR YOUR TICKET

ATTENDEE DISCOUNT CODES ARE IN
YOUR POST-CONFERENCE EMAIL

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