

A close-up photograph of two hands holding a glowing blue fiber optic cable. The hands are positioned on either side of the cable, with fingers gently gripping it. The cable itself is the central focus, emitting a bright blue light that creates a soft glow around it. The background is a deep, dark blue, which makes the glowing cable stand out prominently. The overall mood is one of precision and technological advancement.

Making AI Real in
Customer Success:
**From Pilots to
Performance**

Introductions



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Trends we have observed in Customer Success



Most companies accelerating or maintaining IT investment in 2025, but leaders split on macroeconomic outlook and whether an economic downturn is likely



GRR and NRR have trended down in recent years and remain at recent lows, potentially reflecting an increase in vendor-switching, pricing pressure, or AI displacement



Investment in Customer Success has continued to grow over the past 5 years, with offshore hiring growing at a higher rate vs. onshore and > 40% of SaaS companies having a CCO (vs. <15% in 2020)



Premium CS continues to become more prevalent with ~60% of customers paying for a premium CS offering from one of their vendors and 30% of the rest citing likelihood to start paying for premium CS

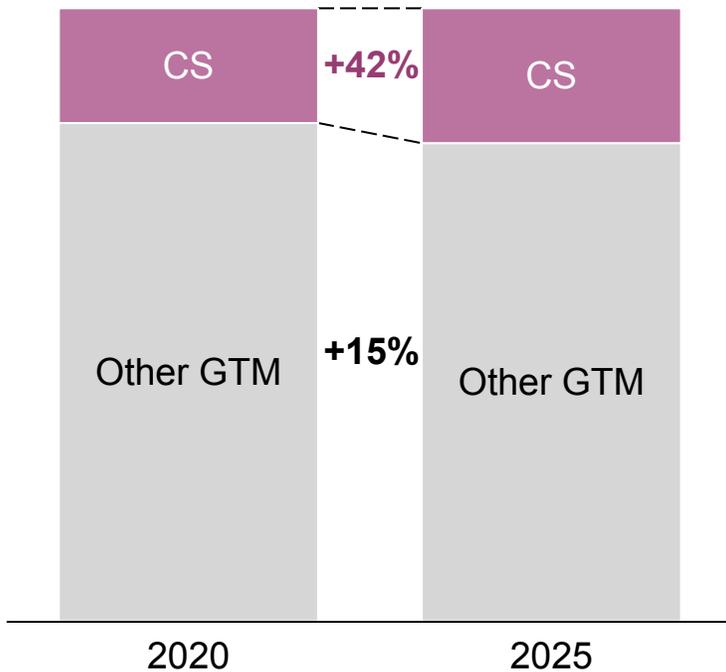


There is increasing accountability placed on CS and expectation to show clear ROI: frontline CSMs have had an increasing % of their compensation tied to NRR/GRR

CS has grown faster than the rest of GTM, even while GRR/NRR have declined over the past 5 years

CS headcount growth has **outpaced** sales in last 5 years

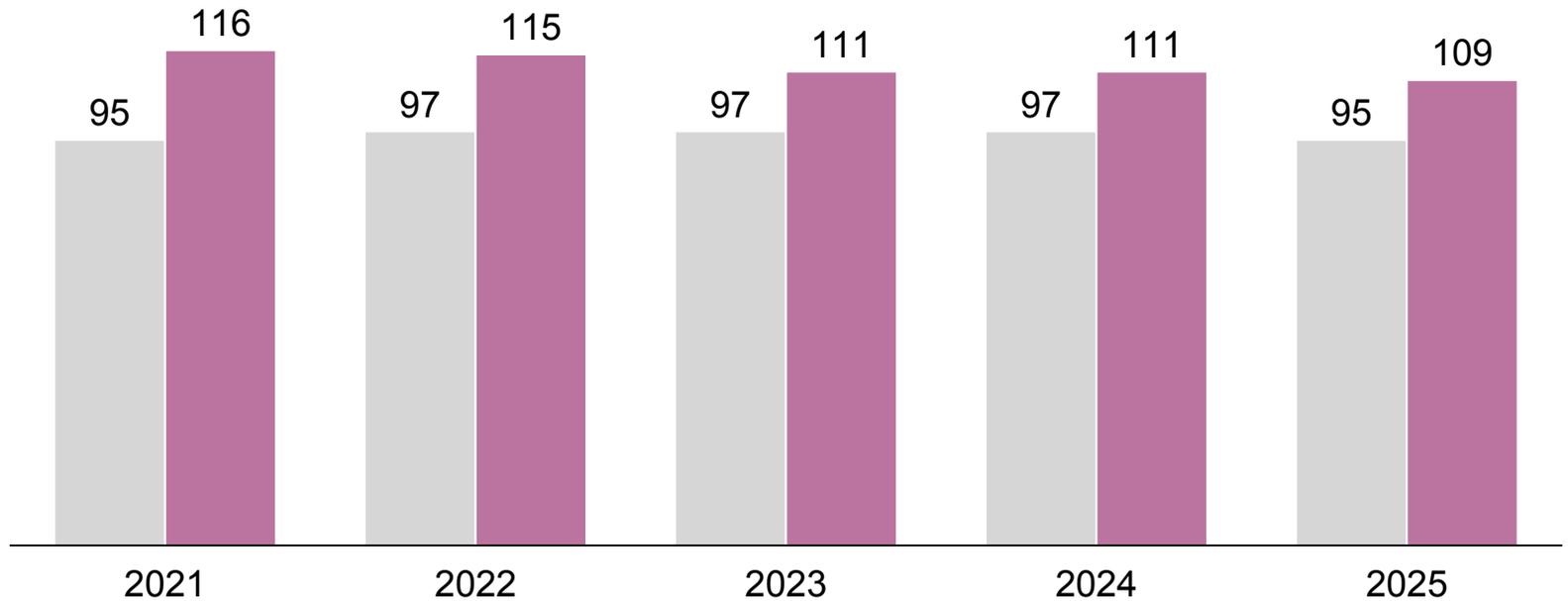
HEADCOUNT DISTRIBUTION
At \$1B+ rev SaaS companies



GRR continuing recent decline to 95%, NRR at 5-year low of 109%

GRR AND NRR BY YEAR

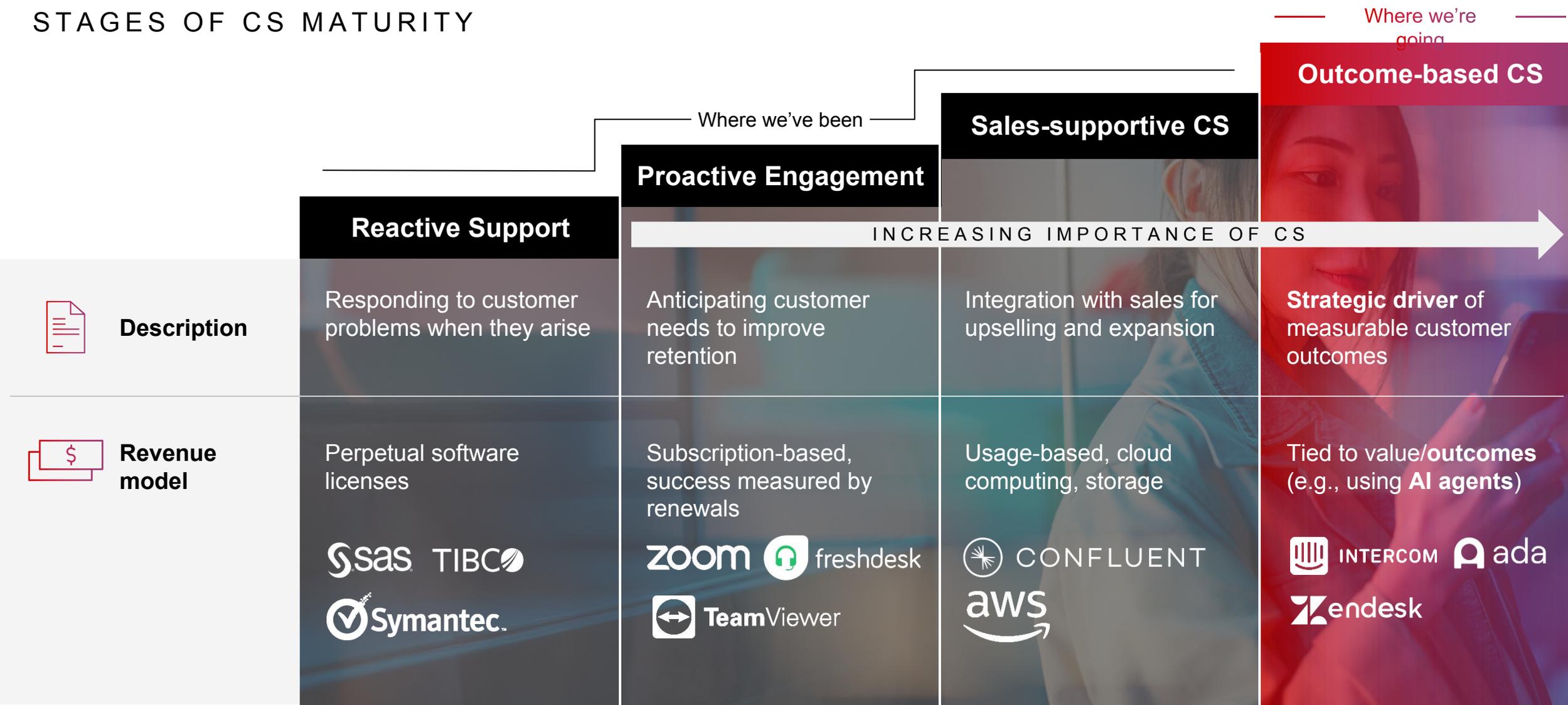
■ GRR Median ■ NRR Median



Note: *2025 includes H1 2025 data
Source: Aura, Public company filings, AlphaSense (N=154), Bain analysis

CS has also continued to grow in strategic relevance as products shift from subscription-based to outcomes-based revenue models (e.g., AI agents)

STAGES OF CS MATURITY



In order for CS to continue to deliver impact, it will be essential to leverage AI to increase CSM capacity/capabilities and deliver better customer experiences

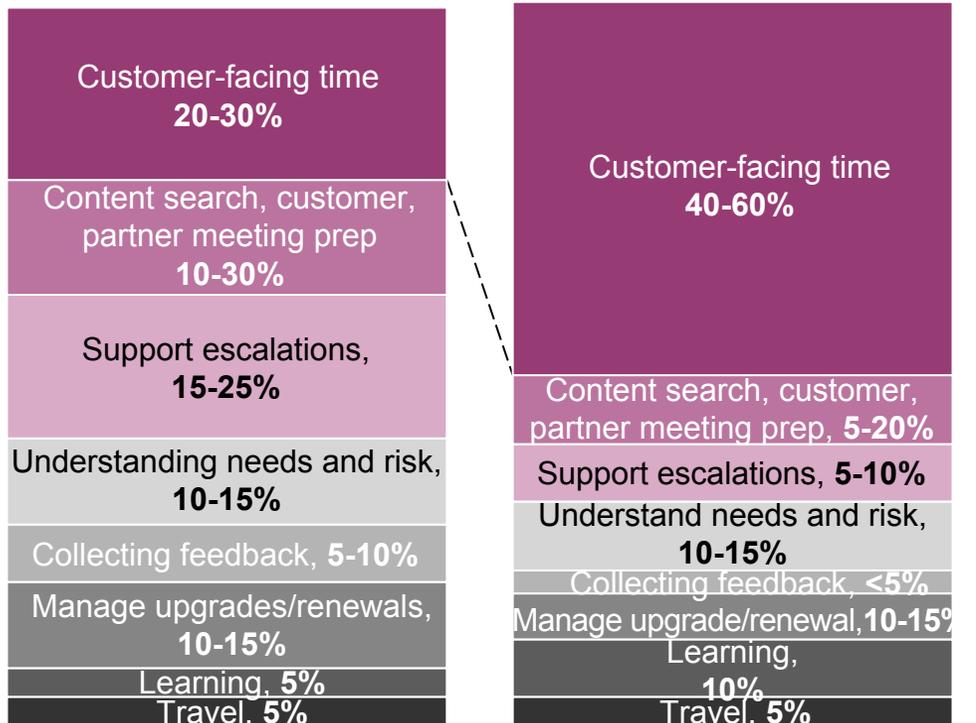
Reclaim **CSMs time** for customer-facing activities

Make every CSM a '10X' player

Increase net retention rates with better coverage/CX

% OF TYPICAL CSM TIME

ILLUSTRATIVE



Example current state
Example

North Star state

With AI, every CSM will ...



Direct their energy, enabled with full product context and customer information



Proactive engagement on churn-driving issues



Lead with smart, tailored messaging and strategies



Improved customer experience



Have a team of agents driving a best-in-class workflow/processes

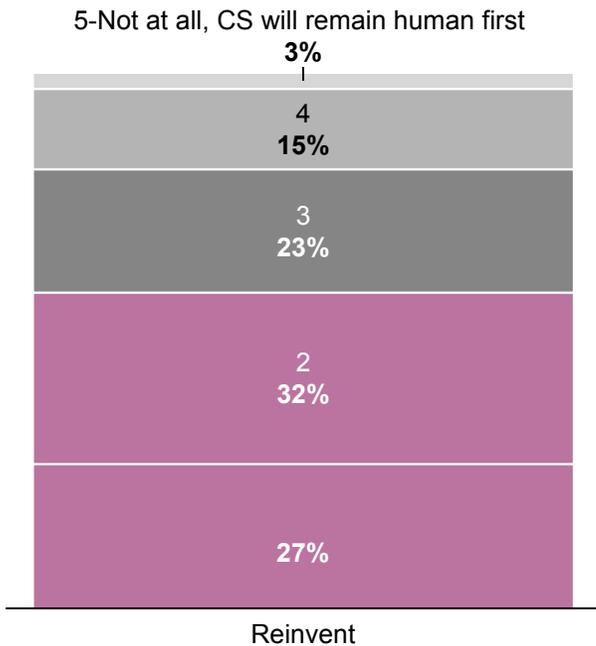


Broader coverage of CSMs across customers

60% of CS leaders rate their function as highly disruptable by AI, and most believe that CSMs should be focused on strategic activities in an AI-first world

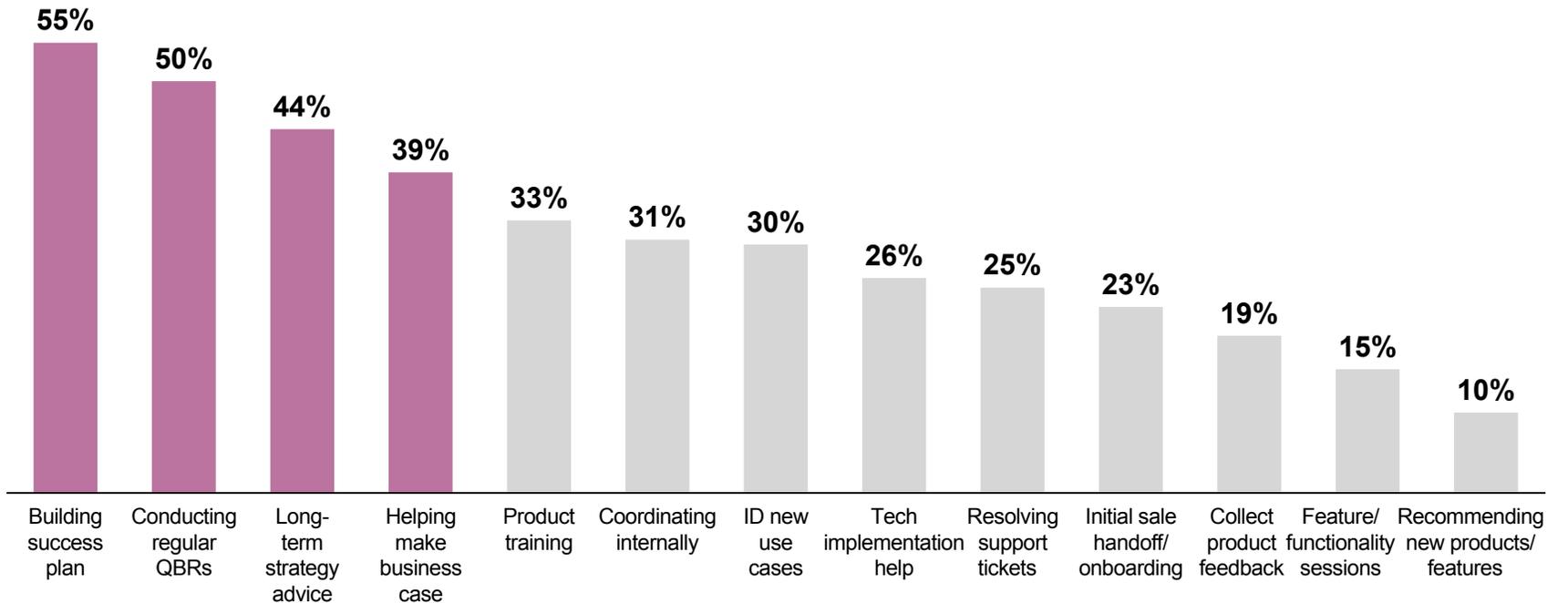
Most CS leaders agree that **CS must reinvent or risk fading away**

1-5 do you agree: AI will fundamentally change Customer Success and CS organizations who do not reinvent themselves to succeed in an AI-first world will fade



CS leaders believe that **CSMs should focus on strategic activities in an AI-first world**

As you think about a future AI-first world, please rank the top 4 most important activities for a human CSM to do. [Rank up to 4]



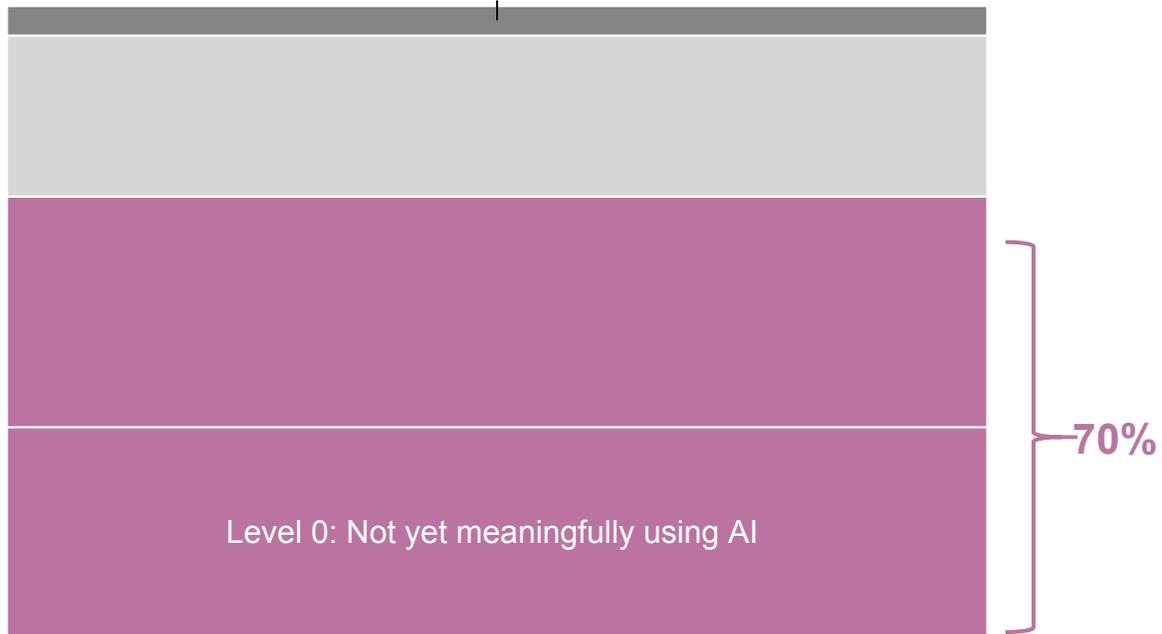
Despite this, **70% of CS leaders aren't using AI meaningfully yet...**and the few who are using AI meaningfully haven't scaled beyond pilots/experimentation

70% of CS leaders are stuck in Level 0/1 use cases...



What level of insights/action is AI delivering for your organization currently?
[Select one]

% OF RESPONDENTS

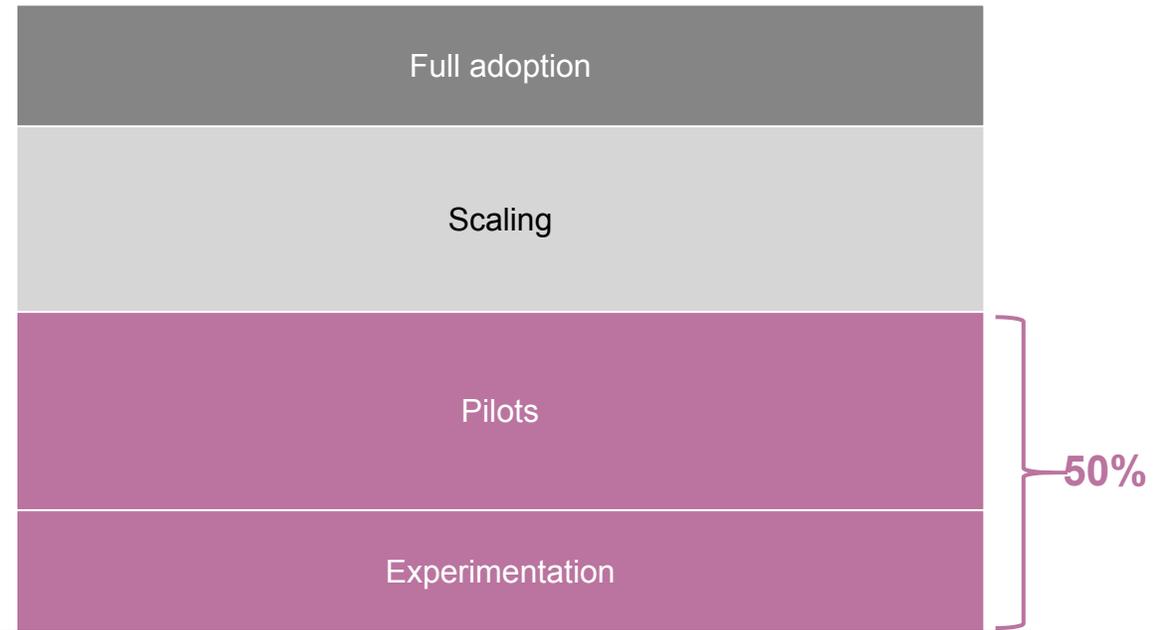


...and half of those using AI are still stuck in **pilots/experimentation**



[For those using AI]
Where is your company in its AI journey as it relates to post-sales?

% OF RESPONDENTS



... and **CSMs are still spending 65% of their time on lower value-add activities** that are easier to automate with AI (vs. strategic activities that drive Sales outcomes)



How much time do your Customer Success Managers spend doing the following activities on average? Assume a 40-hour workweek and allocate hours amongst these

% OF HRS PER ACTIVITY

35%	40%	25%
Helping customers make business case	Collecting product feedback	Helping users with new features
Advising on long term strategy	Resolving support tickets	
Conducting strategic QBRs/assessments	Helping with setup/implementation	Initial post-sale onboarding
	Aligning on business objectives	Coordinating with internal teams
	Recommending new products	
Bucket 1: Activity remains human-first	Bucket 2: AI transforms activity	Bucket 3: AI largely negates need for human performing activity

Key commentary

01

Over half of CSM time is consumed by routine, low-differentiation tasks, limiting focus on strategic customer engagement

02

High-value activities that drive customer outcomes like conducting QBRs and advising long-term strategy are still **a minority of CSM time**

03

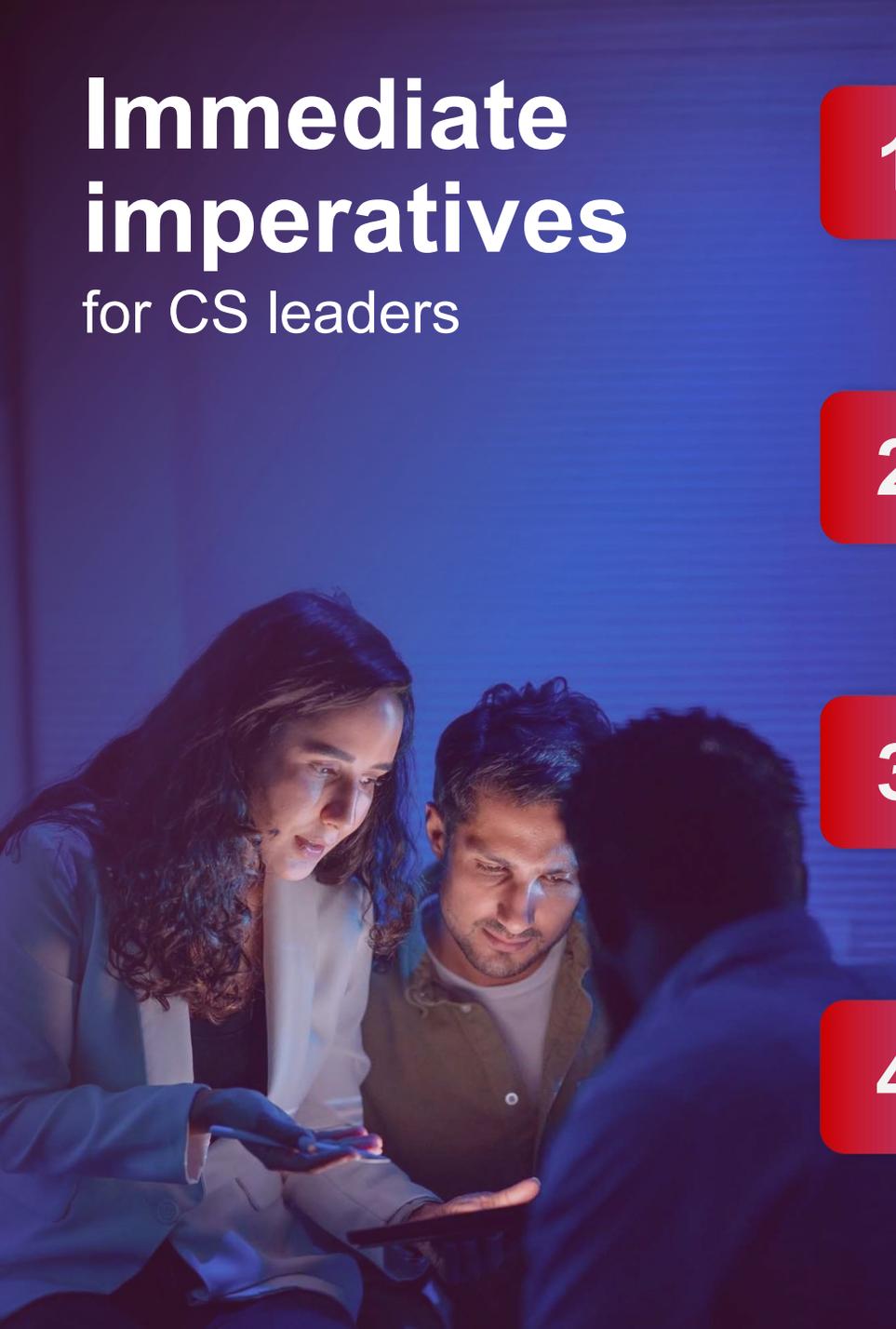
There is a **clear opportunity to automate and digitize repetitive tasks** to unlock time for judgment-heavy, trust-building work

04

AI and process redesign can shift the mix: bots for product education, workflows for coordination, predictive tools for risk assessments

05

Without this shift, **CS risks remaining reactive and transactional**, rather than becoming a true driver of growth and retention

A woman with long dark hair and a man are looking at a tablet together. The woman is pointing at the screen. They are in a dimly lit room with blue lighting.

Immediate imperatives

for CS leaders

1

Set a bold top-down ambition on the objective of AI
e.g., covering more customers, improving CX

2

Pick 2-3 processes that will drive the biggest efficiency and impact for CSMs and customers

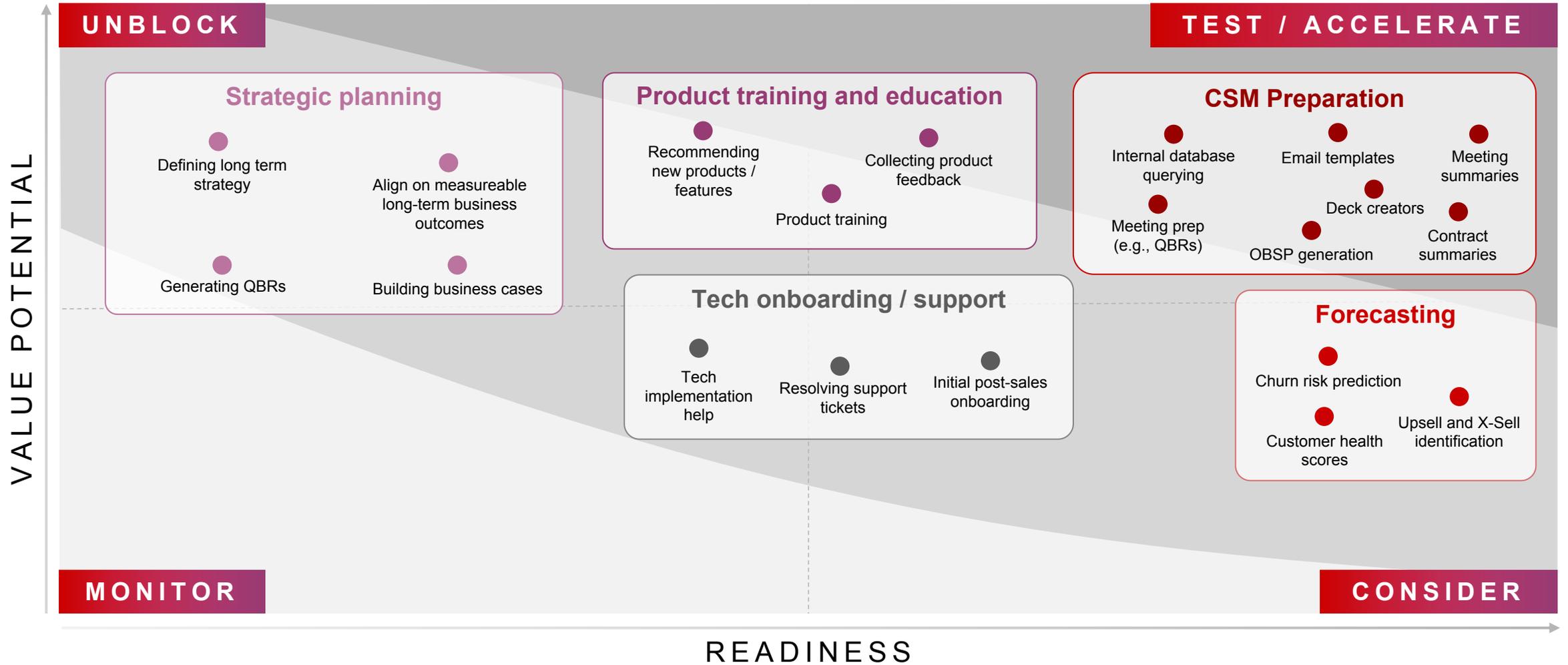
3

Zero-base design those processes to be AI-first

4

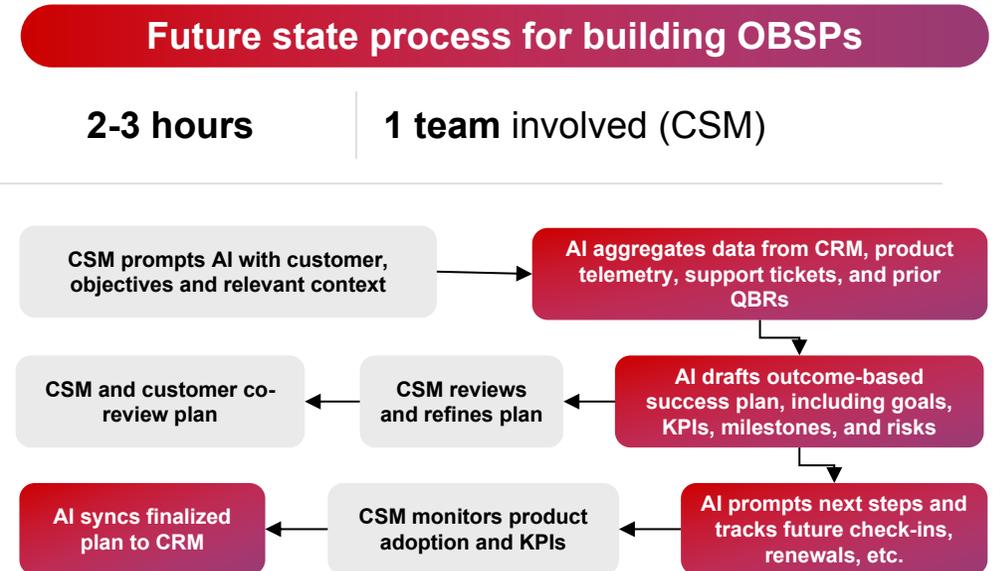
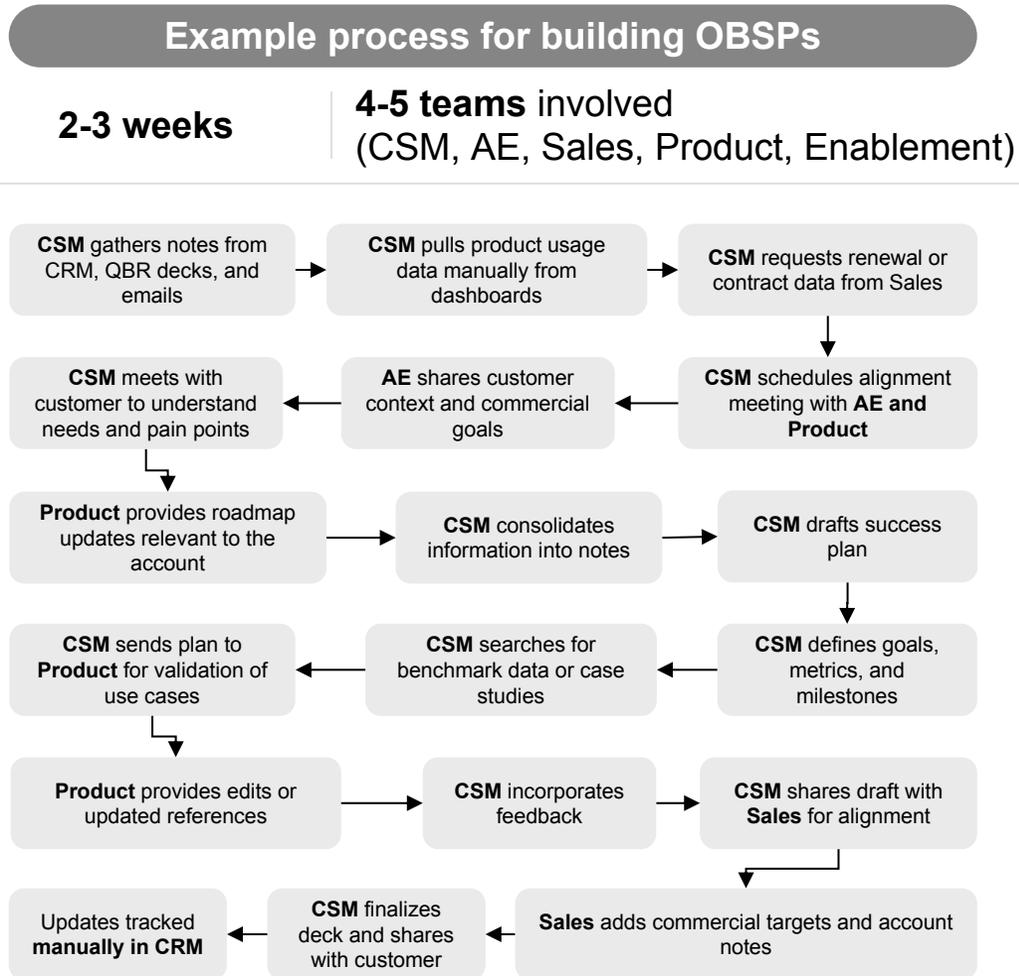
Deeply embed new processes in the organization by creating vocal promoters, removing alternative pre-AI use cases, and building a strong feedback loop

Prioritize 2-3 clusters of end-to-end experiences to avoid micro-productivity



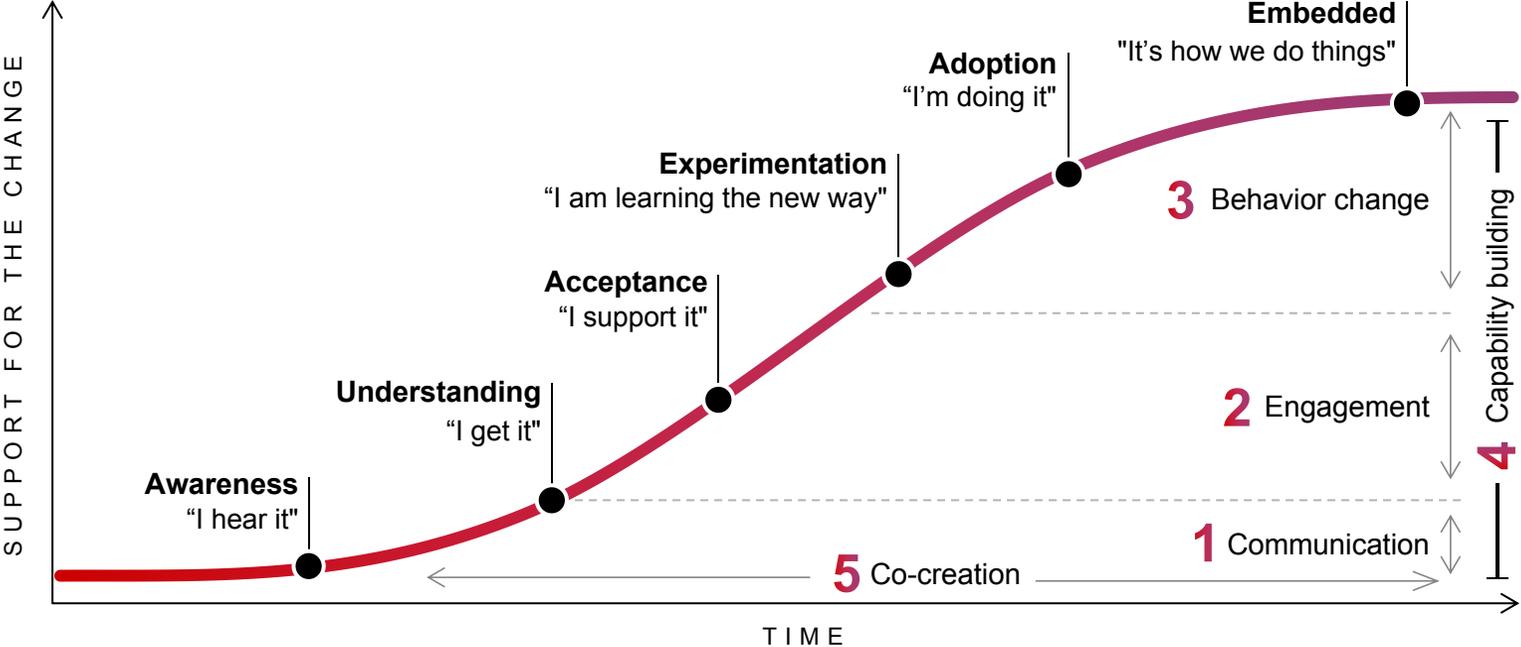
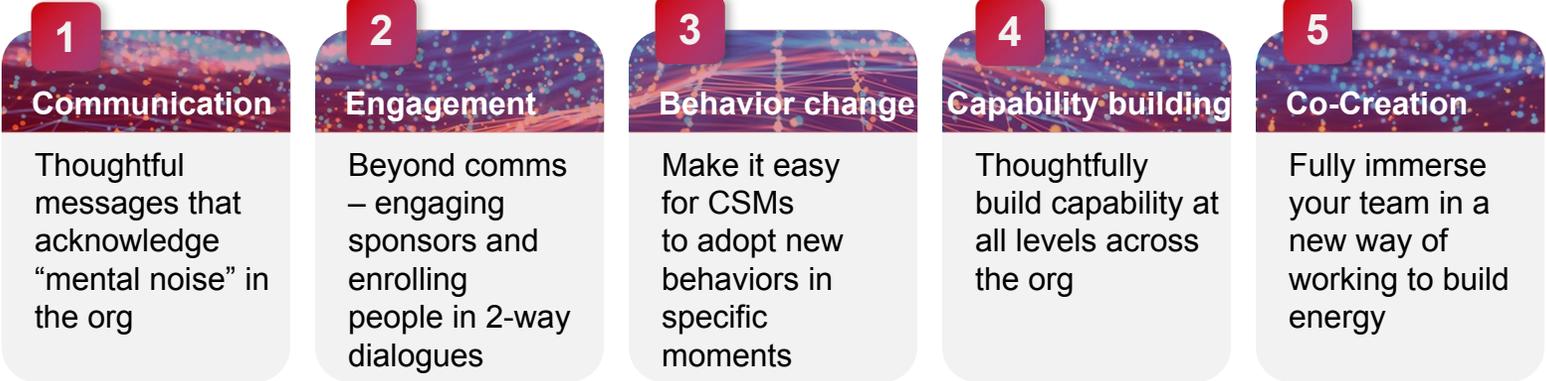
Start by zero-base redesigning processes with AI in mind – rather than applying AI to existing processes

Human AI



STEP 4

Change management is hard, and you need to deeply embed new AI processes in the organization



Keys to accelerating adoption

-  **Create promoters** up and down the organization
-  **Remove alternatives** that delay adoption
-  **Track KPIs** to create feedback loop
-  **Showcase early successes** to build on wins

Takeaways



Over the past years, **Customer Success has grown in size and strategic importance**, but in order to continue to deliver impact – **CS leaders will need to leverage AI to increase coverage and deliver better customer experiences**

01



Most CS leaders **agree AI will transform Customer Success**, but the vast majority aren't using AI meaningfully yet – **the time is now to build a plan to take advantage of AI**

02



To get true value from AI at scale, every CS leader needs to

- (a) Set a bold ambition**
- (b) Pick 2-3 processes that can drive the largest impact with AI**
- (c) Redesign these processes in an AI-first world**
- (d) Deeply invest in change management to scale**

03

Macro sentiments: Most companies still accelerating/maintaining IT investment



BUDGET IMPACT

How has the current economic environment impacted your company's IT strategy?

% OF RESPONDENTS

