CS Consulting

Activate. Cultivate. Expand.

The A.C.E. Framework

A sequential model for building a predictable, compounding revenue engine from the customers you already have.

THE CS CONSULTING

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Why this framework exists

As companies transition from startup to scale-up, they often encounter the "Growth Wall" or "leaky bucket syndrome," where acquiring new logos is no longer enough to sustain growth against churn.

The A.C.E. Framework offers a sequential solution to this challenge, designed to build a predictable, compounding revenue engine by maximising Net Revenue Retention (NRR).

This model requires three distinct pillars that build upon one another to engineer customer success:

- **Activate.** Focuses on speed and certainty, ensuring customers realise rapid Time-to-Value (TTV) by solving their immediate "burning hair" problems.
- **Cultivate.** Shifts from transactional interactions to relational partnerships, operationalising empathy to embed value and secure long-term retention.
- **Expand.** Leverages the trust established in the previous stages to orchestrate company-wide collaboration, unlocking opportunities for cross-selling, up-selling, and advocacy.

By mastering these pillars in order, you move beyond hoping for renewals to actively engineering a defensive moat around your revenue.

A

PILLAR ONE

Activate value

Make sure the right customers are sold, handed over well, and reach meaningful value within 30 days.

Why true value activation is your growth engine

In Post-Sales, we often focus on NRR and GRR as our key metrics. And rightly so, they are critical. But what's one of the most powerful, yet sometimes overlooked, driving forces behind that sustainable growth we're all chasing?

Let's talk about Time-to-Value (TTV).

Too often, we celebrate high onboarding completion rates, but are we truly focusing on the *speed* and *certainty* of actual value realisation for our customers? Your clients genuinely don't care about your meticulous 12-step setup process. What they care about is solving their burning hair problems, and solving it *fast*. It's often rightly pointed out that "No one buys software to 'complete onboarding.' They buy to solve a problem".

The challenge, as many industry leaders have highlighted, is that many companies don't even know what value IS for their business or their customers, making it difficult to measure how long it takes to get there, let alone track its ongoing delivery. Furthermore, we must remember that value is not static; it is 1. highly subjective to each individual and stakeholder, and 2. can change very quickly as business priorities evolve.

So, how do we shift from just ticking boxes to genuinely activating value in a way that cements customer loyalty and fuels growth from day one, acknowledging these complexities?

I've developed a simple, five-step approach: The V.A.L.U.E. Framework. It's designed to help you stop guessing and start delivering what truly matters to your customers, both for their business and for them personally, and ensuring that value takes root.

Five steps to rapid and real customer success

This is a systematic way to ensure your Customer Success efforts are laser-focused on what your customers *actually* value, not what you *think* they value or what your internal processes dictate. It acknowledges that while constantly defining and measuring ever-evolving value is a persistent problem, a structured approach can bring much-needed clarity and effectiveness.

V Vision alignment: seeing success through your customer's eyes

THE COMMON PITFALL

We assume we know what success looks like for our customers, often focusing only on company-level objectives. We build processes around our internal needs or a generic understanding of value, instead of their specific, desired outcomes and individual motivations. As one CS leader shared from experience with strategic accounts, a fully executed internal playbook doesn't guarantee a customer feels their problem is any closer to being solved, nor does it mean your key contact feels personally successful.

THE VALUE FIX

- **Map value by stakeholder and persona.** Your customer's CFO likely cares most about cost reduction or ROI. Their operations team is probably focused on efficiency gains. And their end-users? They often crave simplicity. Critically, also uncover the *personal* win for your key contacts. Is your champion aiming for a promotion, seeking to reduce their personal workload, or hoping to gain recognition within their organisation? Understanding these individual drivers and making your champion look good personally is key to building strong alliances and getting introductions to their superiors.
- **Understand their "why".** Your clients care about solving their problem. Actively listen to understand the specific problems they are trying to solve, their overarching business goals, and what achieving these means for them on a personal and professional level. This comprehensive vision needs to be understood and agreed upon from the outset.
- **Customer-defined outcomes.** Value is ultimately defined by *them*, not by us. We must establish a CS culture that starts and ends with the customer's point of view, and this includes understanding that their perception of value is subjective and can differ across stakeholders. It's crucial to ensure the *right stakeholder* sees, feels, and can report that value upwards; otherwise, from their perspective, it doesn't count.

A Actions: building a tangible path to success

THE COMMON PITFALL

Progress is measured by internal activities ("training module 3 completed") rather than actual customer achievements tied to their specific definition of value. This leads to a disconnect where you think you're delivering, but the customer feels stuck.

THE VALUE FIX

- **Break success into measurable checkpoints.** Instead of tracking feature adoption rates, define milestones that reflect tangible business impact for the customer, aligned with their unique vision of success. Think "reduced report generation time by 50%" or "achieved [personal goal for champion, e.g., successfully presented X to their board]". Mapping milestones to customer goals and objectives helps show value at every stage of the customer's development.
- **Define clear, shared metrics.** If you can't measure value, you can't know if you're delivering it. Work with your customer to agree on what success looks like in quantifiable terms, both for the company and for the key individuals involved. What are the specific metrics they will use to confirm value has been realised?
- **Ensure milestones are validated by the customer.** Your customer is the only one who can say "yes, value was realised". Build in a valuation step in the process. Don't just assume value based on your actions; confirm it based on their experienced impact. While many ask, tracking these things and validating is where the wheels often fall off.

L Launch: driving to that first "aha!" moment, fast

> THE COMMON PITFALL
>
> Customers are taken through lengthy, generic onboarding processes, and critical first wins (both for the business and for individual stakeholders) are delayed, leading to frustration and disengagement. Many teams still don't have TTV defined or segmented by customer type, putting everyone through the same standard onboarding.

THE VALUE FIX

- **Front-load the quick wins.** Identify the one or two features or use cases that can deliver immediate, tangible impact for *that specific customer persona* and their *personal objectives*. Your goal is to get them there in week one or two, not month three. This initial positive experience is crucial for building momentum and belief.
- **Coach behaviours that drive outcomes, not just feature adoption.** Focus your guidance and training on how the customer can use your product to achieve their specific desired outcomes. It's less about clicking every button and more about solving their core problem effectively.
- **Personalise the journey.** Many teams haven't done any segmentation, so running tailored onboarding is a non-starter. If you've mapped value by persona and individual motivation, you can now tailor the initial execution to focus on what matters most to *them*, accelerating their path to that first critical success. Starting with the right value at the right time for the right people is the most customer-centric thing to measure.

U Understand: creating a continuous learning loop in a world of shifting value

> **THE COMMON PITFALL**
>
> Onboarding and initial value delivery are treated as a one-time event. There's no systematic process to learn from each customer's experience and iteratively improve TTV, especially given that value is subjective and changes quickly. The ongoing challenge of constantly measuring this shifting value often leads to teams relying on assumptions.

THE VALUE FIX

- **Measure what actually moves the needle.** Track the metrics that truly reflect value delivered, revenue impact, time saved, specific problems solved for the customer. Crucially, acknowledge that what "moves the needle" might change. As you engage, continuously seek to understand if the customer's definition of value is evolving. Tracking problems solved is a great idea, especially when it's going to be a slower burn to get to that value outcome data.
- **Build a robust learning system.** This is critical. Survey every client at key intervals (e.g., 30, 60, 90 days), or aligned with their expected "moments that matter". Ask specific questions: What clicked? What didn't? What is their perception of value *now*? Has anything changed in the business that redefines success for them?
- **Iterate and compress TTV.** Use that invaluable intel gathered from your learning system to continuously refine your onboarding processes, value propositions, and success milestones. This iterative process is key because value is 1. always subjective and 2. can change very quickly. Your processes must be agile enough to adapt.
- **Identify churn reasons early.** Your learning system is also your early warning system for potential churn. Understanding what didn't click for one customer, or how their value definition shifted without being met, can help you save the next.

E Embed value: making success stick and sparking advocacy

> **THE COMMON PITFALL**
>
> Initial value is achieved, but it doesn't fully integrate into the customer's regular workflows, or early enthusiasm isn't leveraged, leading to gradual disengagement or missed opportunities to create advocates. The "erosion of belief" can be a silent killer if value isn't consistently reinforced and felt.

THE VALUE FIX

- **Systematically reinforce value achieved.** Don't assume the customer always remembers or attributes value correctly. Regularly communicate and reiterate the successes achieved against their initial (and evolving) goals outlined in the Vision Alignment and Actions and Milestones stages.
- **Drive deeper integration of initial solutions.** Focus on embedding the use of your product or service for the *initially solved problems* into their daily or weekly routines.

- **Identify and nurture early champions.** When customers express satisfaction with the initial value, recognise and nurture these emerging champions. Encourage them to share their success internally.
- **Capture early success stories and testimonials.** With validated value and happy champions, proactively seek opportunities to capture this positive sentiment through testimonials, case studies, or even informal feedback that can be shared (with permission).
- **Ensure a clear and seamless transition** from this "activation" phase to the ongoing relationship management, the Cultivate pillar of A.C.E.

More than just happy customers

When you implement The V.A.L.U.E. Framework, acknowledging the subjective and dynamic nature of value and ensuring it's deeply embedded, you move beyond hoping for success to actively engineering it. The results are clear:

- **Faster, stickier adoption and deeper embedding.** Customers who achieve value quickly and see it reinforced are more likely to integrate your solution deeply into their operations.
- **Reduced churn.** Solving problems fast, delivering on promises from day one, adapting to changing value perceptions, and embedding your solution is your best churn prevention strategy. Onboarding and initial value realisation is a very crucial time for setting the scene for growth or failure.
- **Increased NRR and GRR.** As many attest, if you can shorten the distance between "buy" and "benefit," and ensure that benefit is deeply felt and consistently reinforced, everything else gets easier, renewals, upsells, advocacy. TTV and embedded value are key drivers of these crucial metrics; focusing on these often leads to the NRR/GRR taking care of itself.

C

PILLAR TWO

Cultivate relationships

Build the customer plans, relationships, warning signals and renewal rhythm that reveal risk early.

Cultivating relationships for retention

Once you have successfully activated value for your customer, you must shift gears to cultivating the relationship to ensure that value endures.

It is easy to get lost in health scores, usage data, and support tickets. However, the most effective Customer Success leaders know a fundamental truth: retention is rarely about software alone; it is about the strength of the partnership.

To "Cultivate" is to nurture the human connections that secure your revenue base proactively. As a CS Leader, you must set the tone from the top: Relationships are the leading indicator of Gross Revenue Retention (GRR).

A human-first leadership approach is not "soft"; it is a commercial imperative. When a customer trusts you, when they feel a genuine partnership rather than a transactional vendor arrangement, the probability of retaining that revenue increases significantly. Your role as a leader is to show that by cultivating deep, multi-threaded relationships, you are building a defensive moat around your GRR.

From vendor to partner: the "Cultivate" mindset

The difference between a churn risk and a lifetime customer is often the depth of the relationship.

- **Vendors are transactional.** They are evaluated on price and basic utility. They are easy to replace.
- **Partners are relational.** They are evaluated on shared success and trust. They are indispensable.

To drive GRR towards 100%, you must move your team from a transactional mindset ("Did we close the ticket?") to a relational mindset ("Did we strengthen the partnership today?"). Every interaction is an opportunity to re-earn the right to their business.

The strategy

How to structure your operations to cultivate relationships.

1. Cultivating with customers: the "GRR Guardian" strategy

Your team's daily behaviours should directly contribute to revenue security.

- **Multi-threading is mandatory.** A relationship with a single "Champion" is a single point of failure. If that person leaves, your GRR is at risk. Cultivation means building relationships *wide and deep*, from the end-user to the budget holder.
- **The "no-surprise" value review.** Move beyond generic QBRs. Cultivate trust by having honest, transparent conversations about value. If a customer is not seeing ROI, admit it and build a plan to fix it. This honesty builds the kind of trust that saves renewals.
- **Proactive vs. reactive.** Don't wait for a fire drill to call. Cultivate the relationship during "peacetime." A check-in that adds value deposits social capital that you can draw on when renewal negotiations get tough.

2. Cultivating with internal teams: building a customer-centric culture

A CS leader cannot hold the weight of all relationships alone. You must cultivate a culture where *everyone* feels responsible for the customer.

- **The empty chair rule.** In every internal meeting, whether it's product roadmap planning or a finance review, imagine the customer is sitting in an empty chair in the room. Ask: *"How would this decision explain to them? Does this strengthen or weaken our relationship?"*
- **Language matters.** Shift the internal narrative from "dealing with tickets" to "solving for people." Humanise the data to remind the business that GRR is driven by real humans making emotional decisions.

3. Cultivating with peers: the CS, AM, Sales and Product alliance

- **Sales alignment.** Cultivate a relationship with Sales where the hand-off is sacred. Ensure Sales understands that selling "bad-fit" deals creates a relationship debt that CS cannot pay off.
- **Product feedback loop.** Your team holds the "Voice of the Customer." Cultivate a relationship with Product where this intelligence is treated as gold. When customers see their feedback reflected in the product, they feel heard and valued.

The toolkit

Understanding the "why" of cultivating relationships is great, but putting it into practice is what drives retention. Here are practical tools you can start using today.

For CS leaders: fostering a psychologically sound environment

- **Practise empathetic inquiry in 1:1s.** Move beyond status updates. Ask questions that uncover the human state of your team:
    - *"What part of your work felt most energising this week, and what felt draining?"*
    - *"What's one thing that, if it changed, would make your role significantly more effective?"*
    - *"What support do you need from me right now that you might not be getting?"*
- **Champion "psychological safety" huddles.** Dedicate time in team meetings to discuss *how* the team is feeling, not just *what* they are doing. Celebrate small wins and acknowledge challenges without blame. This empowers the team to share ideas and concerns openly.
- **Introduce "bias spotting".** In strategic discussions, ask: *"Are there any assumptions or biases influencing our thinking here?"* This encourages collective awareness and better decision-making.
- **Model vulnerability.** Share your own mistakes and what you learned. This signals to the team that errors are learning opportunities, not career-enders.

For CSMs: building stronger customer relationships

- **The "feel, felt, found" technique.** Use this to de-escalate frustration and handle objections gracefully:
    1. **Feel.** *"I understand how you feel about [the issue]."* (Acknowledge emotion)
    2. **Felt.** *"Other customers have felt similarly when they first encountered this."* (Normalise experience)
    3. **Found.** *"However, we've found that by [taking this action], they were able to [achieve outcome]."* (Offer a path forward)
- **Reflective listening.** Before jumping to a solution, summarise what you heard: *"So, if I understand correctly, your main concern is X, and the impact is Y. Is that right?"* This ensures the customer feels truly heard.
- **Ask "outcome-oriented" questions.** Dig deeper than features.
    - *"If this feature worked exactly as you envision, what would that enable you to achieve for your business?"*
    - *"What is the ultimate goal where this challenge is a roadblock?"*
- **Map customer personalities (lightly).** Adapt your style. Is your contact data-driven? Be concise. Are they relational? Spend time on the story. Small adaptations build rapport fast.

The perfect QBR

A "Quarterly Business Review" is often the only time you get a seat at the table with the decision-maker. To cultivate a true partnership, transform the QBR into a strategic workshop.

Step 1: the preparation (the foundation)

You cannot wing a strategic meeting. Success is determined before you enter the room.

- **Data deep dive.** Analyse usage metrics (active jobs, licences used) and support history ("Red Flags"). Know the facts cold.
- **The stakeholder map.** Identify who is in the room. You need the decision-maker, not just the admin.
- **The irresistible invitation.** Don't call it a "Check-in." Call it a "Strategic Alignment and ROI Review." Frame the agenda around *their* goals.

Step 2: the review (value realisation)

This is where you prove you are worth the money. Stop reading slides and start telling stories.

- **Data storytelling.** Connect features to business impact. Instead of "You have 500 applicants," say "By centralising 500 applicants, you reduced Time-to-Hire by 20%."
- **Address the elephant.** If there were bugs, address them proactively. Transparency builds trust; avoidance destroys it.

Step 3: the strategy (the future focus)

Apply the 80/20 rule: the customer should speak 80% of the time during this section.

- **Ask strategic questions.** "Looking at 2026, what is your #1 priority?"
- **Listen for the "white space".** Their answers reveal the gap between where they are and where they want to be. This is where expansion opportunities hide.

Step 4: the roadmap (co-creation)

Position your solution as a bridge to their goals.

- **Consultative approach.** "You mentioned IT hiring is a bottleneck. We have a module that specifically targets that. Shall we look at how it fits?"
- **Joint planning.** Define milestones for the next 3, 6, and 12 months.

Step 5: follow-through (commitment)

- **The protocol of winners.** Send a summary email within 24 hours, including validated ROI, strategic goals, and a list of actions with owners. This is your project plan.

Behind every logo on your renewal forecast are people trying to succeed.

The ROI of kindness

Ultimately, "Cultivate" is about operationalising empathy and respect. By leading with a human-first approach and equipping your team with these practical relational tools, from "Feel, Felt, Found" to the Perfect QBR, you do more than just make customers happy. You secure the trust that makes your GRR unshakeable.

E

PILLAR THREE

Expand revenue

Turn proven customer value into natural opportunities for upgrades and wider adoption.

Orchestrating a company-wide revenue engine

In the first pillar, **Activate**, you learned how to identify and solve the client's "burning hair" problems, ensuring they realised the value they were promised immediately. In the second pillar, **Cultivate**, you focused on operationalising empathy to build deep, trust-based relationships that secure retention and prevent the "erosion of belief".

Now, we arrive at **Expand**.

Traditionally, expansion in Customer Success has been viewed narrowly: simply spotting a chance to cross-sell a feature or up-sell a licence. However, true expansion is not just a sales tactic; it is a holistic strategic movement. It is the natural consequence of the trust you have cultivated.

To expand means to leverage your position as a trusted advisor to widen your impact. It requires leaning heavily into your entire Go-To-Market (GTM) ecosystem, Sales, Marketing, Product, and Account Management, to transform a happy customer into a powerful engine for Net Revenue Retention (NRR) and advocacy.

This section outlines how to orchestrate these internal partnerships to uncover strategic opportunities, from regional expansion to new departmental adoption, that even your clients may not have yet imagined.

1. The Sales and CS alliance

The most critical operational link in the expansion chain is the relationship between Customer Success and Sales. This must move beyond a simple "handoff" to a continuous, bidirectional exchange of intelligence.

THE CSQO: FORMALISING THE FEED

We must operationalise the "Hunter" mindset within CS by establishing Customer Success Qualified Opportunities (CSQOs).

- **The process.** A CSQO is not a hunch; it is a qualified lead based on usage data, strategic conversations, and demonstrated value. CS must have a defined process to document these opportunities (e.g., in the CRM).
- **The handoff.** Creating a "warm handover" is essential. CS provides the context, the "why" behind the need, so Sales doesn't go in cold. This collaborative approach ensures the customer feels heard, not sold to.

MUTUAL EDUCATION: THE LEARNING LOOP

For this alliance to work, both teams must act as students and teachers:

- **CS learning sales mechanics.** CSMs often shy away from commercial conversations. To expand effectively, CS must learn from Sales. How do they structure a commercial pitch? How do they navigate procurement? Understanding the *mechanics* of closing a deal empowers CS to tee up opportunities that are actually closeable.
- **Sales learning from CS.** Sales teams need to know what happens *after* the signature. CS must feed back data on the "Ideal Customer Profile" (ICP). If a certain segment churns deeply despite a perfect sales pitch, Sales needs to know. If a specific persona expands rapidly, Sales should target them more aggressively. This feedback loop refines the entire acquisition strategy.

2. Marketing as an expansion partner

Marketing is often underutilised in the post-sales expansion journey. To truly expand, you must integrate Marketing into your customer lifecycle to validate value and open new doors.

LEVERAGING AI AND CUSTOMER INTELLIGENCE

In the modern CS stack, we record countless conversations. This is a goldmine for expansion.

- **Mining for gold.** Use AI tools to analyse call transcripts and identify recurring keywords related to competitor weaknesses or unmet needs. Feed this intelligence directly to Marketing to craft targeted campaigns for your existing base.
- **The content loop.** When a customer articulates a "win" on a call, that snippet is the seed of a case study. Marketing can polish these stories to equip CS with the collateral needed to prove value to *other* departments within the client's organisation.

COMMUNICATING INNOVATION

Expansion often stalls because customers simply don't know what else you can do.

- **Targeted education.** CS should work with Marketing to automate the communication of new feature releases, not as generic newsletters, but as targeted solutions to the specific problems identified during the Activate phase.

- **Advocacy.** Use Marketing to turn your best customers into advocates. An advocacy programme isn't just about feeling good; it's a lead generation tool. When a client speaks for you, they are expanding your market reach.

3. Product collaboration

Your Product team is the architect of the future, but they need your blueprint. Expansion opportunities often hide in the friction points of the Customer Experience (CX).

BEYOND THE ROADMAP

Collaboration with Product goes beyond reporting bugs. It is about identifying value gaps.

- **The CX feedback loop.** Where is the interface confusing? Where is the usage dropping off? CS must relay this quantitative and qualitative data to Product. A smoother UX removes barriers to adoption, which is the precursor to expansion.
- **The "add-on" opportunity.** CS is uniquely positioned to spot where a client is using a "workaround" to solve a problem. These workarounds are potential new features or add-ons. By articulating these needs to Product, you can help define a roadmap that includes monetisable add-ons that lead to quick expansion wins.

4. Strategic expansion

True expansion isn't just selling more of the same to the same people. It is about strategic geography and lateral growth.

THE "UNSEEN" OPPORTUNITIES

Your day-to-day contact (your Champion) has their own silo. Part of your role is to help them see beyond it.

- **Regional expansion.** If you have proven value in the UK office, who runs the EMEA or US divisions? Strategic expansion means mapping the account to find these territories. Your goal is to package the local success and present it as a blueprint for global standardisation.
- **Cross-departmental growth.** If your tool solves a problem for the Marketing team, does the HR or Sales team suffer from a similar friction? CS must act as the bridge, asking the questions that reveal these lateral opportunities, opportunities your direct contact might never have considered.

5. Collaborative account management

If your organisation has a dedicated Account Management (AM) team, the alignment must be seamless.

- **The win-win.** CS creates the environment of trust; AM leverages that environment for commercial growth.
- **Unified front.** To the client, there should be no friction between "someone helping me" (CS) and "someone selling to me" (AM). Both are there to solve problems. The expansion conversation should be framed as "solving the next problem," not "hitting a quota".

The outcome of the A.C.E. framework

By mastering these three pillars, you transform the trajectory of your scale-up:

1. **Activate.** You validated the "burning hair" problem and delivered Time-to-Value.
2. **Cultivate.** You built a defensive moat of trust and relationships to secure retention.
3. **Expand.** You leveraged that trust, orchestrated your GTM teams, and strategically widened your footprint to drive Net Revenue Retention.

This is how you break through the "Growth Wall." You stop relying solely on new business sales and start building a predictable, compounding revenue engine from the assets you already have: your customers.

Who wrote this

Thomas Voigt is a customer success and account management leader with 20 years inside revenue roles.

As VP of Account Management at GWI he grew revenue from existing customers from £3M to £10M, with a team that went from three people to fifty across EMEA and APAC. The A.C.E. framework in this document is the model he built there and has run with clients since.

He now works from the outside, diagnosing and rebuilding post-sales functions for scale-ups. Current and recent work spans commerce AI, HR tech and hospitality tech across the US, Europe and Asia. Certified Revenue Architect. German native, London-based.

Where this goes next

If you read this and recognised your own function in it, the useful next step is a conversation, not a proposal. Thirty minutes, no deck. Tell me what you are carrying and I will tell you honestly whether I can help.

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