

Investing in Customer Success

Why strengthening the CS function now pays back across the business

01

The Opportunity

Most companies now expect more from Customer Success than they did two years ago. Leadership watches retention and expansion closely, other teams are asked to work alongside CS, and the function is expected to show its impact in terms the business understands. In a recurring revenue business, most of a customer's lifetime value is earned after the first contract. CS is the function that captures it.

What CS drives	What it means for the business
Retained revenue	Customers reach measurable outcomes and renew with confidence
Expansion revenue	Customers who see the value delivered buy more, without the cost of new acquisition
Predictable forecasting	An early read on renewals, expansion, and risk each quarter
Product and market insight	Customer patterns reach Product, Sales, and Marketing as decisions they can act on

25–95%

profit increase from a 5% improvement in customer retention.

(Source: Bain & Company)

02

What the Company Gets

Lead2Scale is where CS leaders build the strategy and operating model they can defend at the executive table, with Angeline Gavino and a small group of peers. The work is done on the company's real customers and data, so every lesson ends in an asset the business can use. These are the assets your CS leader can build in the program:

CS charter What CS owns and what it does not, so Sales, Support, Product, and CS stop overlapping or leaving gaps	Segmentation and coverage model Capacity math that ties headcount to the revenue each customer segment carries
Value map How customer outcomes connect to the product, so value can be shown before every renewal	Customer journey and playbooks Onboarding, success planning, value reviews, renewal, and expansion plays, including a digital motion for smaller accounts
Health scoring and forecasts Signals that predict risk, and forecasts for renewals, churn, and expansion	Executive and board reporting A review cadence and an exec update built on recommendations, plus the case for headcount and budget
Team standards Hiring profiles, performance standards, career paths, and a coaching and enablement plan	Cross-functional agreements Working agreements with Sales, Product, Finance, and Marketing, and a customer advisory board

THE CAPSTONE

A CS plan the business can act on. Every member builds a full CS plan covering scope, targets, coverage, headcount, and cross-functional priorities, then pressure-tests it live with peers in the mid-year and annual planning sessions before it reaches leadership.

03

How It Works

Short recorded lessons

15 to 25 minutes each, taken in any order, so the work follows the company's priorities

Two live sessions a month

Office Hours and the Decision Room, where real decisions get worked through with peers

Quarterly planning

Mid-year and annual plan sessions, plus quarterly reviews, all recorded

Every template included

Plus onboarding and a private Slack community with the group

04

The Investment

PAY IN FULL

\$995

For the year, January 2027 group

3-PAYMENT PLAN

\$395/payment

3 payments 30 days apart, \$1,185 total

The \$995 rate is open only to the January 2027 group, which is limited to 10 CS leaders. The rate stays the same when the membership renews. The time commitment is two 60-minute live sessions a month plus the lessons your CS leader chooses. The work between sessions is applied directly to the company's CS function.

	Outside CS consultant	Learning on the job	Lead2Scale
Investment	\$3,000 to \$10,000 per month, or \$15,000+ as a scoped project	No direct cost, with a high cost in time and slower progress	\$995 for the year
Who does the work	The consultant	Your CS leader, without a roadmap	Your CS leader, with expert guidance and peer review
Where the expertise lives	With the consultant, after the engagement ends	Built slowly through trial and error	Inside the company

05

What CS Leaders Say

"The biggest unlock was learning where CS sits in the P&L. Once I started pointing our problems back to gross margin instead of calling them CS issues, executive leadership started making different decisions."

THERESA JOSEPH
VP of Customer Success

"I used to show the board our churn and it sounded like CS just wasn't doing its job. Now I show them why we're really churning, the root causes, and they realize, 'oh, it's not you guys.' It changed the whole conversation."

MARK MOLINYAWE
Director of Customer Success

06

About Angeline Gavino



Angeline has spent 17 years in Customer Success, as the founding CSM, the team manager, the VP, and the leader scaling CS organizations from early-stage startups to a \$13 billion ARR company. She was named a Top 25 CS Influencer (2024) and Top 100 CS Strategist (2025), and has keynoted Gainsight Pulse. She founded CS RevSpeak to work with CS leaders who are ready for a more senior, more visible role in their companies.

NEXT STEP

The January 2027 group is limited to 10 CS leaders. The 3-payment plan allows enrollment to begin while internal budget approval is finalized. Questions about invoicing or company payment can be directed to **support@csrevspeak.com**.

Learn more about Lead2Scale

csrevspeak.com/l2s