



Scaling Customer Success at Series B AI SaaS Platform

30-60-90 Leadership Plan — Lynell Wagenman

Human-centered systems for scalable growth



Key Themes & Opportunities

Operational Scale

- Expanding CS organization
- SMB-CS evolution
- Scalable personalization

Renewal & Risk Visibility

- Earlier risk detection
- Renewal predictability
- Proactive intervention

AI & Customer Intelligence

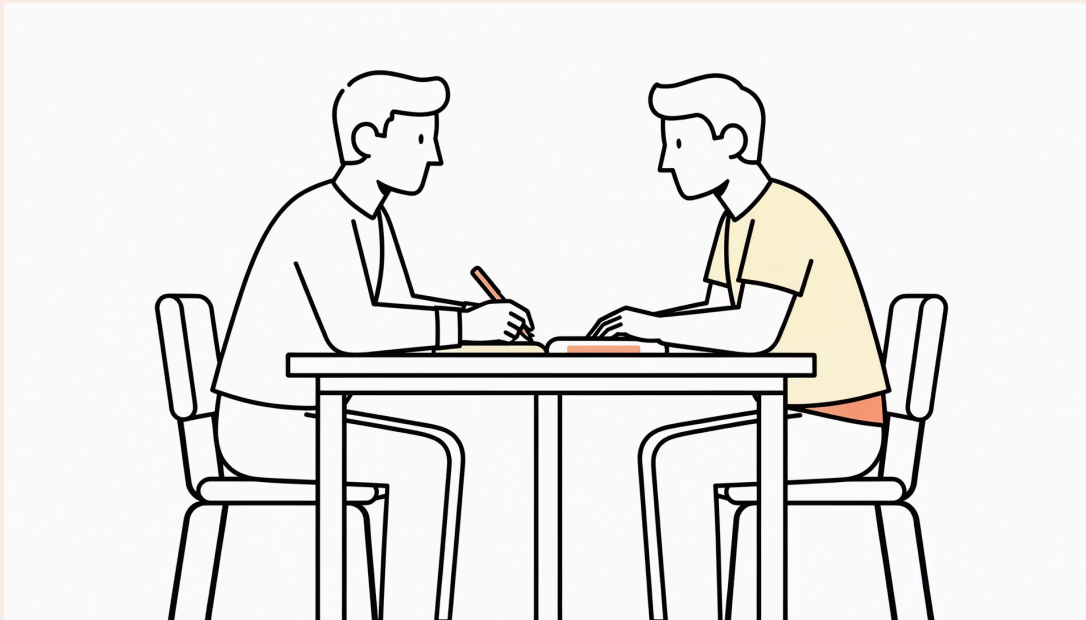
- Strong data foundation
- Operational AI workflows
- Actionable customer insights

Team Enablement

- Coaching & empowerment
- Cross-functional ownership
- Operational clarity

DAYS 1-30

Listen, Map, and Diagnose



Learn the Business

- Team & cross-functional discovery sessions
- Customer journey mapping end-to-end
- Renewal workflow audit

Evaluate Operational Signals

- Health score logic & data fidelity
- Forecasting visibility gaps
- Escalation patterns & gaps

Understand AI Infrastructure

- Current automation workflows
- Signal quality assessment
- Adoption opportunities

📌 *Understand before optimizing.*

Build Systems That Scale

Renewal & Risk Management

- Implement leading indicator tracking
- Standardize account review cadences
- Launch proactive intervention motions before red flags escalate

Product & Segmentation Readiness

- Evaluate onboarding differences across product lines
- Identify future segmentation opportunities
- Align CS motions to evolving customer needs

Operational Clarity

- Define ownership across the customer lifecycle
- Drive lifecycle consistency at every stage
- Align cross-functional workflows with CS motions

📌 *Scale consistency without adding bureaucracy.*

Days 61-90 & Leadership Philosophy

Scale What Works

- Formalize operational rhythms and playbooks
- Expand product & data feedback loops
- Support scalable CS workflows as product complexity evolves

Leadership Philosophy

- **Human-centered systems** – design for people first
- **Continuous improvement** – measure, learn, iterate
- **Empowered teams** – clarity enables ownership

The goal: Proactive, operationally mature, and deeply human Customer Success.

