



## **Customer Success Maturity Scorecard**

A self-assessment tool for SaaS vendors and Customer Success leaders

By Rob Steinberg, Founder – Steinberg Consultancy

[www.steinbergconsultancy.com](http://www.steinbergconsultancy.com) | [rsteinberg@steinbergconsultancy.com](mailto:rsteinberg@steinbergconsultancy.com)

© 2025 Steinberg Consultancy LLC. All rights reserved.

## How to Use This Scorecard

This Customer Success Maturity Scorecard is a self-assessment tool designed to help B2B SaaS companies quickly identify where they stand across key success dimensions. Use this tool to evaluate current strengths and gaps, and to prioritize areas for investment or process improvement.

For each category, score your organization on a scale of 1 to 5:

1 = No maturity (nonexistent or ad hoc)

3 = Developing maturity (some structure, inconsistent execution)

5 = High maturity (repeatable, scalable, and effective)

© 2025 Steinberg Consultancy LLC. All rights reserved.

## Customer Success Maturity Dimensions

Category	Description	Score (1–5)
Onboarding Process	Is there a defined, repeatable process for customer onboarding with timelines, milestones, and ownership?	
Customer Segmentation	Are customers segmented by value, lifecycle stage, or risk profile with tailored engagement strategies?	
Success Planning	Are success plans co-developed with customers and tracked against measurable outcomes?	
Health Scoring	Is customer health tracked using data signals and updated consistently across accounts?	
Playbooks & Automation	Are playbooks in place for key moments (e.g., QBRs, renewals) and enabled with automation or tooling?	
Renewals & Expansions	Are there clear processes and collaboration between CS and Sales for renewals and upsell motions?	
Customer Feedback Loop	Is feedback gathered and acted on through surveys, interviews, and regular check-ins?	
CS Technology Stack	Is the CS team equipped with tools (e.g., Gainsight, Catalyst, CRM) and using them effectively?	
Team Structure & Roles	Are roles clearly defined across CS, onboarding, support, and account management?	
Executive Engagement	Do CS leaders regularly engage with customer executives to align on strategic goals?	

© 2025 Steinberg Consultancy LLC. All rights reserved.