DIGITAL CUSTOMER SUCCESS MATURITY

	FOUNDATIONS	EMAIL BASICS	INTERNAL TASKS & ADVANCED EMAIL	SELF-SERVICE	NEW CHANNELS
Details	These are the basic prerequisites you must have in place first, before building or launching a digital CS program.	Start here with simple automation and 1:many messaging. This is the "low hanging fruit" of digital, but starting small and strategic will benefit you later.	Automate repetitive CSM tasks so they can spend more time on strategic activities, and get more creative with email.	Enable customers to connect, find answers, and solve problems independently, to match customer desires and free up internal time.	Incorporate innovative new communication channels and methods to take digital CS to the next level. This is the fun part!
Examples	• Automation platform • Permission to contact • Segmentation & personas • Content & resources	• Customer newsletter • Product announcements • Feature highlights • Time-based emails	• CSM intro email • QBR schedule reminders • Churn risk alerts • Usage-based emails	• Customer community • Knowledge base • On-demand videos & training	• In-app notifications • Slack/WhatsApp/text • Automated EBRs • Generative AI
Key Metrics	• Baseline NRR & GRR • Cost to serve • Improvement goals by segment	• Email deliverability • Open rates • Clickthrough rates • Unsubscribe rates	• CSM time saved • Product usage thresholds • Cost to serve	• NRR & GRR • Engagement rates • Cost to serve • Training consumed	• NRR & GRR • Engagement rates • Cost to serve • Time to value