

From CS-Led to Customer-Led: Checklist for CS Leaders.

By completing the tasks and answering the questions on this checklist, customer success leaders can continuously improve their customer journey to make it more customer-led, identify pain points, and increase customer engagement.

Part 1: **Identifying Key Pain Points:**

- Which parts of the customer journey do customers open the most tickets for?
- Which parts of the customer journey does your CSM have the most emails or calls about?
- Which self-serve touchpoints have the lowest completion rates?

Part 2: **Customer - Journey Mapping:**

- Evaluate which customers the customer-led journey is most relevant for, taking into account factors such as customer type, size, and product complexity
- Map which parts of the journey are customers not engaged with enough, both for high-touch and low-touch engagement (Search for opportunities to involve the customer more directly in the process)
- Determine which touchpoints must have human interaction
- Evaluate which touchpoints could be automated
- Consider which touchpoints can be more personalized
- Identify key milestones in the customer journey and determine which ones can be designed to empower the customer, making them feel that they have made an active choice to learn and engage with your product or service
- Evaluate the resources needed to make changes, including which resources should be updated and any additional resources that may be necessary
- Review how your customer consumes information and create a checklist of possible channels and content formats that can accommodate different learning preferences.
- Assess the most appropriate channels for reaching your customers based on their stage in the customer journey and available resources
- Develop a plan for rolling out changes to touchpoints that have been identified as needing improvement, starting with small changes that have the lowest effort but highest potential benefit
- Secure buy-in from company leadership by demonstrating the expected increase in KPIs including time-to-value, CSM manual work reduction, engagement rate improvement, and overall customer experience enhancement
- Continuously monitor and optimize each step to ensure ongoing improvement and alignment with customer needs and expectations

Create intuitive, customer-led journeys that your customers can confidently navigate on their own with EverAfter customer hub.

[See it in action](#)