

Best Practices for Leveraging AI in Customer Success

Customer Success teams are managing larger books of business with fewer resources, all while facing higher expectations for retention and growth. AI, when applied strategically, can help prioritize efforts, surface meaningful insights, and scale impact across accounts. This guide outlines best practices for using AI to drive measurable outcomes, not just automation.

Prioritization: Spend Time Where it Matters

Use AI/ML health scores to:

- Identify churn risk, upsell opportunities, and critical touchpoints in the customer journey across your book of business to be proactive
- Go beyond rules-based scores: AI/ML models adapt based on real-time customer behaviors unlike weighted scoring which is built off of preconceived assumptions.
- Surface patterns and themes across your portfolio, so you can plan at the account and segment level.

WHY IT MATTERS

AI doesn't just flag an at-risk account, it tells you why and recommends what to do next based on real customer data. It makes prioritization smarter, scalable, and directly tied to outcomes.

Insight: Make Sense of the Noise

AI can process large volumes of data: product usage, sentiment, tickets, call transcripts and translate them for CSMs into actionable insights, e.g.

- A pattern where early feature adoption in Month 1 leads to higher expansion rates by Month 3
- A recurring blocker that consistently derails onboarding success in enterprise accounts
- Shifts in customer tone that hint at dissatisfaction before anything is ever

WHY IT MATTERS

CS teams can tell stories using this data to customers. AI surfaces the most relevant information fast, so teams can act decisively and deliver more strategic value to customers.

Strategy: Adapt to Each Customer's Reality

Great CS teams scale their strategy—not just their headcount. AI can help:

- Map org charts and highlight key roles, champions, blockers, and influencers
- Suggest next best actions based on account context and past outcomes
- Auto-generate handover docs and success plans tailored to each customer
- Evolve from static playbooks to dynamic strategies that adapt in real-time

WHY IT MATTERS

Customer needs, stakeholders, and goals vary widely across accounts. Relying on static plans or generic triggers leads to missed opportunities and misaligned actions. AI enables dynamic, context-aware strategies that evolve with each customer.

Efficiency: Scale Without the Burnout

When used correctly, AI can multiply your team's productivity. It can:

- Record and summarize calls, tag key moments, and auto-generate follow-ups
- Draft personalized emails, business cases, and even slide decks
- Create support articles from Slack threads or email exchanges
- Prioritize tasks based on customer impact

WHY IT MATTERS

Manual tasks drain time and limit capacity. AI-enabled efficiency allows teams to reallocate effort toward strategic initiatives such as renewal preparation, expansion planning, and executive engagement, without compromising execution quality or consistency.