

# topSERV Fractional Customer Success Transformation Case Studies



## High-growth Customer Success Function from Zero in a Network Analytics Vertical SaaS Business

**Situation:** A pre-Series C SaaS company in the network visibility and analytics space had reached roughly \$6 million ARR with no formal Customer Success function. Renewals were handled inconsistently by sales, technical onboarding lacked structure, and there was no support team or documentation framework. The absence of operational clarity made it difficult to forecast revenue or measure customer health.

**Intervention:** Designed the company's first structured Customer Success organization. Implemented Salesforce Service Cloud for ticketing and Guru for knowledge management. Developed renewal forecasting and weekly performance reporting systems. Built a headcount model that mapped coverage to account tier and need, then hired and coached more than ten specialists to deliver global coverage. This enabled the company to transform from reactive problem-solving to proactive account growth.

**Outcome:** Within the first year, gross retention exceeded 90%, and the Customer Success team drove over half of the company's new revenue. The function matured into a strategic growth driver that provided revenue predictability, visibility into customer value, and cross-functional alignment with Sales and Product.

**Framework insights:** This engagement forms the Build Blueprint. It showcases how early stage companies can benefit dramatically from putting in place the systems, roles, and cadences that make Customer Success measurable and ready to scale.

### Key levers applied:

- Strategic forecasting & tactical progress reporting
- Customer-informed coverage and GTM strategy
- Reactive to proactive transformation
- Scalable technical and non-technical systems operationalization

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## Double ARR, raise \$45M Series B for a Data-as-a-Service Provider

**Situation:** A fast growing Data-as-a-Service provider entered 2021 with only two inexperienced CSMs, no renewal process, and sellers performing double duty as solution engineers. The rapid increase in customer complexity exposed critical gaps in onboarding, forecasting, and account prioritization.

**Intervention:** Led a comprehensive rebuild while preparing for aggressive scaling. Introduced customer segmentation and playbooks to focus resources on expansion-ready accounts. Personally managed strategic renewals while codifying renewal forecasting in Salesforce. Built a dedicated Solutions Engineering team to support complex data implementations, hiring over ten technical and success professionals to stabilize operations and support exponential ARR growth.

**Outcome:** Customer Success evolved from a reactive support function to a proactive partner in revenue expansion, supporting 100% ARR growth and playing a pivotal role in securing a \$45 million Series B raise. The organization exited the rebuild phase with a mature forecasting model, consistent renewal practices, and a unified technical-sales interface.

**Framework insights:** This engagement demonstrates the Rebuild & Scale Playbook. It balances foundation repair with growth execution through segmentation, forecasting discipline, and technical excellence. It outlines a framework for growth companies to introduce operational discipline while preserving the agility required to capture rapid market expansion.

### Key levers applied:

- Technical Solutions Engineering organization to support complex, full-lifecycle deals
- Talent evaluation, acquisition, training, and development
- Account prioritization and efficient resource allocation
- Scaling metrics and data analytics, interpretation, and reporting

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## Hyper-efficient Company Pivot in a Developer Tools Vertical SaaS Business

**Situation:** A compliance-focused SaaS company faced declining adoption and significant product-market fit erosion. Customer Success generalists juggled both account management and technical support, creating inefficiency and unclear ownership. Leadership needed to stabilize the business and extend runway without compromising customer experience while evaluating a product pivot towards a developer-focused platform.

**Intervention:** Redesigned the post-sales structure by separating technical and account responsibilities, establishing rigorous deal handoffs, and enforcing accountability across Sales and Solutions Engineering. Partnered with Product to identify major feature gaps and create measurable ROI metrics for customers. Unified Support and Solutions Engineering under one operational structure and introduced several AI-native platforms (DevRev, BackEngine, Granola) to automate documentation, ticketing, Account 360 visibility, and more.

**Outcome:** Reduced headcount by 40% while improving response times, efficiency, and per-customer revenue. The transformation yielded \$600K in annual operating expense reduction, preserved \$500K in ARR, and enabled the company to achieve profitability while growing ARR from \$9M to \$14M. The organization became leaner, data-driven, and sustainable, enabling leadership to pivot toward a new product and buyer persona focus.

**Framework insight:** This engagement highlights the Optimize Model. It employs automation, process clarity, and targeted resource allocation to achieve capital-efficient Customer Success that sustains value even under constrained conditions.

### Key levers applied:

- AI-driven automation for Account 360, Support, and Technical Operations
- Consolidation and alignment of sales, success, support, and solutions engineering
- ROI-focused product value communication
- Ruthless efficiency to facilitate company pivot

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## topSERV Fractional Customer Success Transformation Frameworks

The three case studies illustrate the lifecycle of a scalable, strategic Customer Success function: from building foundations to scaling operations and optimizing for efficiency. Each framework — Build Blueprint, Rebuild & Scale Playbook, and Optimize Model — is designed to address a specific inflection point in a company’s growth journey.

Framework	Stage	Core Outcome
Build Blueprint	Early stage	Establish systems, roles, and cadences so Customer Success becomes a measurable revenue engine.
Rebuild & Scale Playbook	Growth stage	Add structure and segmentation to sustain high growth and protect customer health.
Optimize Model	Mature / Pivot	Automate and streamline operations to achieve capital efficient retention and profitability.