

Your First 90 Days as a Chief Customer Officer

What Makes the CCO Role Different

Of all GTM functions, Customer Success is the most downstream — and yet the most determinative of long-term growth. As a new Chief Customer Officer, you own the messy middle: onboarding, expansion, retention, advocacy — all the parts of the customer journey that happen after the contract is signed.

But here's the challenge: in many B2B tech orgs, CS has historically been reactive, under-resourced, or treated as a catch-all for “everything that happens after sales.” You may be walking into a team that's more focused on putting out fires than driving strategy. Or a culture that views CS as a cost center rather than a growth engine.

Your job is to change that narrative — not just externally, but internally.

Today's CCO isn't a glorified support leader. You're a revenue owner, a product feedback loop, a cross-functional glue, and increasingly, a strategic peer to the CRO and CMO. In many orgs, the CCO is now the most visible executive after the CEO — because retention, expansion, and customer health are the lifeblood of profitability.

That's why your first 90 days are so critical. Not just to fix broken handoffs or overdue QBRs — but to reposition CS as a strategic lever for the business.

What to Focus on in Days 1–30

Begin by unpacking the true state of the customer.

- ☐ What does customer health look like by segment?
- ☐ How accurate are the NPS, CSAT, or health scores in use?
- ☐ Which accounts are at risk, and why?
- ☐ What percent of your book of business has had strategic engagement in the past 90 days?

Just as importantly, examine the post-sale journey as a system:

- ☐ Where are the drop-offs between Sales and CS?
- ☐ What does onboarding look like across different segments?
- ☐ Are success plans standardized, tracked, and visible?
- ☐ Who owns the expansion motion — and how aligned is it with the CRO?

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Then look inward. CS teams are often over-stretched and under-leveraged. Who's doing real success work vs. support or admin tasks? Are CSMs trained on commercial acumen, or only on relationship management? Does your team know how to influence outcomes — or just how to respond to issues?

Your first month is about pattern recognition. Find the gaps — in systems, accountability, and expectations — and start to map the flywheel you'll need to build.

What to Focus on in Days 31–60

This is your time to align the org around what CS really is — and what it should be.

Start by defining CS's strategic charter:

- ☐ What outcomes is the CS team accountable for?
- ☐ Where does CS partner — and where does it lead?
- ☐ What are the non-negotiable standards for customer engagement?

This may require resetting expectations with Sales, Marketing, Product, and RevOps. Use this window to build alignment around:

- ☐ Customer segmentation models
- ☐ Ownership of renewals and upsells
- ☐ QBR structure and frequency
- ☐ Feedback loops between CS and Product

Don't overlook the metrics. One of the most common challenges for CS leaders is lack of clarity around what's being measured, how it's being calculated, and what "good" looks like. Partner with Finance and RevOps to:

- ☐ Audit GRR and NRR reporting
- ☐ Standardize churn and expansion definitions
- ☐ Validate health scoring logic

Internally, this is your moment to reset the culture. If the team is reactive, overworked, or misaligned, you'll need to create space for a new model. That may mean rebalancing portfolios, shifting from generalist to segment-based coverage, or rethinking the CSM-to-account ratio.

You are, in this phase, not just managing performance — you're setting the foundation for scale.

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What to Focus on in Days 61–90

Now you prove the model — through action and alignment.

Start by delivering visible wins:

- ☐ Stand up a new QBR template and run it across your top accounts
- ☐ Re-launch onboarding with clear milestones and customer comms
- ☐ Roll out health score visibility across Sales and CS
- ☐ Reassign accounts or rebalance books based on segment insights

This is also when you drive home your new cross-functional role. Partner closely with:

- ☐ Sales to forecast expansion, co-own renewals, and reduce churn
- ☐ Marketing to activate advocacy, referrals, and case studies
- ☐ Product to escalate feedback and shape roadmap inputs

You want your peers to stop seeing CS as “downstream delivery” — and start seeing it as an executive lever.

By the end of this phase, your team should feel clarity. Customers should feel seen. And your CEO should feel like CS is no longer a gap in the go-to-market system — but a force multiplier.

The Real Mandate

You weren’t hired to chase renewals or smooth over churn.

You were hired to make customer value a strategic engine.

The CCO of today is not a glorified support lead — you’re the linchpin between growth and retention, between product truth and marketing narrative, between Sales ambition and post-sale reality.

Your first 90 days are your chance to reposition Customer Success — as essential to profitability, central to strategy, and fully capable of owning outcomes.

Do that, and you won’t just extend customer lifetimes.

You’ll extend the company’s runway.

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Pavilion Insight



In your first 90 days as a CXO, one of the most strategic moves you can make is bringing in trusted external partners including agencies, freelancers, or proven talent from your network.

There's often hesitation to do this early on, but the right partners provide more than bandwidth, they bring aligned professional perspectives on where you're going, while you take the time to deeply understand where the organization has been. This gives you the space to assess the people, processes, and systems required to get there without pausing progress.

These partners can help you kick-start high-impact work with clear goals, defined scopes, and measurable outcomes. Whether it's GTM alignment, marketing, operations, or revenue programs, this approach creates early wins, accelerates trust, and models a culture of operational excellence.

Your network is your net worth. The right partners don't just extend capacity they scale your impact and help embed best practices, while involving internal teams early to foster alignment, capability, and momentum."

Allison Munro

Chief Marketing & Experience Officer, Vena Solutions

Additional Resources

CCO School (Pavilion University)

CCO School delivers the frameworks, strategies, and real-world insights you need to scale smarter, prove the revenue impact of CS, and expand your influence at the highest levels.

[Learn more](#)

The Great Customer Success Identity Crisis (Topline Newsletter)

In her article, Julie Persofsky, GTM Advisor and Revenue Expert at Metadata, dismantles one-size-fits-all Customer Success models, urging companies to reject trends in favor of CS structures tailored to their unique DNA, team strengths, and customer needs to drive sustainable growth.

[Read now](#)

Shifting ICPs Without Breaking CS with Demetra Anagnostopoulos of SurePeople (Podcast)

Demetra Anagnostopoulos, Chief Success Officer of SurePeople dives into the challenges of aligning customer success processes, redefining customer journeys, and ensuring her team has the skills to manage diverse expectations.

[Watch now](#)