ORIGIN 63

CX63 Scorecard:
How Does Your Customer Success Strategy Stack Up?

Scorecard

Introduction

Welcome to the CX63 Self-Assessment, a tool designed to help you evaluate the effectiveness of your customer success strategy across key areas of the customer journey.

Origin 63's CX63 Methodology prioritizes six core themes— **Customer Onboarding, Customer Activation, Proactive Intervention, Reactive Support, Renewal Best Practices, and CX to Marketing and Sales Feedback**—each essential for driving the major outcomes of Net Revenue Retention (NRR), decreased Churn Rate and increased Customer Lifetime Value (LTV).

By working through this self-assessment, you'll gain insight into how well your organization supports customer success and identify opportunities to improve customer satisfaction, engagement, and retention.

This assessment also includes a section on the **CX to Sales and Marketing Feedback Loop**, ensuring alignment across departments and reinforcing a cohesive brand experience.

This assessment will help you understand where your customer success strategy is strong and where there may be room for improvement, giving you actionable insights to optimize each stage of the customer journey.

For each question, select "Yes," "No," or "I Don't Know" to reflect your current practices. **Give yourself 1 point for every Yes you answer.**

Customer Onboarding Best Practices

Objective: Evaluate the effectiveness of customer onboarding and the transition from sales to service.

Questions	Yes	No	IDK	Score
Does your team have a documented handoff process between sales and customer success/service teams?				
Are new customers provided with a clear and structured onboarding plan that outlines goals and milestones?				
Do you set clear expectations with customers regarding their onboarding journey?				
Is there an educational program or resources in place to help customers understand the full value of the product?				
Do you track customer engagement during onboarding to ensure they are progressing and feeling supported?				
Total Score				

Customer Activation

Objective: Determine if customers are effectively introduced to product value and usage.

Questions	Yes	No	IDK	Score
Do you monitor when customers reach the point of first realizing value with your product?				
Are customers encouraged and supported in setting up key features that will drive their success with the product?				
Is there a defined point in the customer journey where "activation" is considered complete and tracked?				
Do you collect feedback from customers to understand if they're experiencing the product's intended value?				
Are CSMs or automated systems prompted to reach out if customers are not activating key features?				
Is onboarding self-guided or supported by members of your team?				
If supported, what steps contributed to an onboarding being completed successfully?				
Total Score				

Proactive Intervention

Objective: Assess proactive measures taken to ensure customers continue to see value and stay engaged.

Questions	Yes	No	IDK	Score
Do you have a system in place to track customer health through passive data collection?				
Are health scores regularly reviewed and acted upon by CSMs or automated triggers?				
Does your team proactively reach out to customers showing signs of disengagement or low usage?				
Are automated messages or resources sent to customers at key journey milestones to ensure continued value?				
Do you conduct QBRs (Quarterly Business Reviews) or equivalent check-ins to discuss progress and challenges with customers?				
Total Score				

Reactive Support

Objective: Evaluate the effectiveness of your support system in addressing customer issues and gathering feedback.

Questions	Yes	No	IDK	Score
Do you have a dedicated help desk or ticketing system for handling customer inquiries and issues?				
Are customer issues tracked and categorized to identify recurring problems and areas for improvement?				
Do you measure Customer Satisfaction (CSAT) after support interactions to assess service quality?				
Is your average response time for support inquiries within industry benchmarks?				
Are escalated issues resolved with a process that involves follow-up and root-cause analysis?				
Total Score				

Renewal Best Practices

Objective: Assess activities aimed at preparing for and executing successful renewal conversations.

Questions	Yes	No	IDK	Score
Do CSMs have a structured plan for renewal preparation that includes reviewing account health and usage?				
Are renewal conversations started well before the contract expiration to avoid last-minute negotiations?				
Does your team track and follow up on customers nearing renewal who show low engagement or product usage?				
Are customers reminded of the value delivered throughout the year as part of the renewal strategy?				
Are there incentives or strategies in place to encourage multi-year renewals or expansion at renewal time?				
What is the average length of contract or subscription within your customer base? How many renew?				
Total Score				

CX to Sales and Marketing Feedback Loop

Objective: Assess how effectively the company maintains a feedback loop between CX, sales, and marketing to ensure a consistent brand experience and successful acquisition.

Questions	Yes	No	IDK	Score
Is there a structured process for handing off qualified leads from marketing to sales with clear expectations and criteria?				
Do your sales and customer success teams regularly share feedback with marketing about customer needs, challenges, and experiences?				
Are customer success insights (e.g., common product feedback, feature requests) shared with marketing to refine messaging and positioning?				
Does your brand story and value proposition remain consistent and clear throughout the customer journey, from marketing to post-sale support?				
Are marketing materials or campaigns updated based on feedback from sales and customer success about customer engagement and satisfaction?				
Total Score				

How did you do?

Your CX63 Customer Success Maturity Score

Based on your responses, your total score provides insight into the maturity of your customer success strategy. Use your results to identify where your team excels and where there may be opportunities for enhancement.

Your Score	What It Means
27–30 points	Congratulations! Your customer success strategy is hitting the majority of best practices across the CX journey. With a strong foundation in place, consider where you can gain efficiencies through automation and proactive data-driven interventions. By fine-tuning these areas, you can maximize both customer satisfaction and operational scalability.
23–26 points	You're on the right track, with a well-developed customer success strategy that's already delivering results. To move to the next level, focus on specific areas for improvement, such as refining onboarding processes, enhancing proactive outreach, or optimizing renewal strategies. Small enhancements in these areas can make a meaningful difference in retention and growth.
14–22 points	Your results indicate that there are significant opportunities to strengthen your customer success approach. Focusing on foundational practices—like effective onboarding, proactive customer health monitoring, and structured renewal preparation—can significantly boost your CX effectiveness. By addressing these areas, you can create a more seamless and value-driven experience that fosters loyalty and retention.
Below 14 points	Your score suggests that there are critical gaps in your customer success strategy that need immediate attention. It's essential to evaluate and implement key customer success practices to establish a solid foundation. Prioritizing improvements in onboarding, proactive intervention, and reactive support will help you create a more effective CX process and enhance customer satisfaction.

Growth Through Happy Customers: Are you ready to take your CX to the next level?

In a world where acquisition often takes precedence, it's time to empower your organization to redefine success by transforming customer experience (CX) into your most powerful growth engine. Your results from the CX63 Customer Success Maturity Assessment highlight where you excel and where there's room for improvement.

At Origin 63, we specialize in helping companies harness the full potential of their customer success strategies. If you're ready to elevate your CX and drive meaningful growth, we invite you to schedule a consultation with our team. Together, we can explore tailored strategies that focus on enhancing customer satisfaction and retention, turning happy customers into your strongest advocates.

Let's Talk

Schedule Your Consultation Today