Customer Success vs Customer Support: Roles and Collaboration Training Course

Professional Development Training Course Outline

Category	Customer Service and Customer Experience	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s hyper-competitive business landscape, organizations are realizing that delivering exceptional customer experiences requires more than just reactive support it demands a proactive, strategic approach. Customer Success and Customer Support, though often used interchangeably, play distinct yet complementary roles in driving customer loyalty, retention, and revenue growth. Understanding the nuances between these functions, and fostering collaboration between them, empowers businesses to enhance customer satisfaction, reduce churn, and accelerate value realization. Customer Success vs Customer Support: Roles and Collaboration Training Course equips professionals with practical strategies, actionable insights, and real-world case studies to maximize the synergy between Customer Success and Customer Support teams.

With the rise of subscription-based models, SaaS platforms, and digital-first customer journeys, organizations can no longer afford siloed operations. Customer Success focuses on long-term outcomes, adoption, and expansion, while Customer Support delivers immediate problem resolution and technical assistance. Bridging these disciplines requires clearly defined roles, streamlined communication, and shared KPIs. Through interactive learning modules, hands-on exercises, and scenario-based case studies, participants will gain the knowledge and tools to foster collaboration, optimize workflows, and elevate overall customer experience. By the end of this course, attendees will be empowered to create a cohesive, customer-centric ecosystem that drives sustainable business growth.

Programme Curriculum

Customer Success vs Customer Support: Roles and Collaboration Training Course

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Course Duration

5 days

Course Objectives

1. Differentiate between Customer Success and Customer Support functions.
2. Identify the core roles and responsibilities of Customer Success managers and Support agents.
3. Explore the impact of collaborative workflows on customer satisfaction.
4. Analyze customer journey touchpoints to optimize engagement strategies.
5. Develop actionable retention and upsell strategies using Customer Success insights.
6. Implement efficient ticketing and escalation processes in Customer Support.
7. Leverage data analytics to drive proactive customer interventions.
8. Enhance communication and collaboration between cross-functional teams.
9. Integrate Customer Success and Support KPIs for aligned performance measurement.
10. Utilize CRM and customer experience tools to streamline operations.
11. Evaluate real-world case studies highlighting best practices in role synergy.
12. Apply conflict resolution strategies to reduce customer friction.
13. Create a roadmap for organizational adoption of a unified customer-centric approach.

Target Audience

1. Customer Success Managers (CSMs)
2. Customer Support Agents
3. Account Managers
4. Product Managers
5. Operations Leaders
6. Sales and Marketing Professionals
7. Customer Experience Specialists
8. Team Leads overseeing client engagement

Course Modules

Module 1: Introduction to Customer Success and Customer Support

- Definition and evolution of Customer Success vs Support
- Key objectives and metrics for both roles
- Differences in proactive vs reactive approaches
- Understanding customer lifecycle impact
- **Case Study:** SaaS company transforming Support into Success-driven model

Module 2: Roles and Responsibilities

- Core duties of Customer Success Managers
- Core duties of Support Agents
- Overlapping responsibilities and potential conflicts
- Role clarity for operational efficiency
- **Case Study:** Telecom company aligning CS and Support teams

Module 3: Customer Journey Mapping

- Understanding touchpoints and pain points
- Mapping interactions with both teams
- Identifying opportunities for proactive intervention
- Using journey insights to reduce churn
- **Case Study:** E-commerce platform improving NPS through collaboration

Module 4: Collaboration and Communication

- Effective cross-team communication strategies
- Weekly syncs, joint dashboards, and reporting
- Shared accountability for customer outcomes
- Tools to enhance collaboration
- **Case Study:** SaaS provider reducing ticket resolution time through alignment

Module 5: KPIs and Metrics Alignment

- CS metrics: NRR, ARR expansion, product adoption
- First response, resolution time, CSAT
- Combining KPIs for holistic customer experience
- Reporting dashboards for executives
- **Case Study:** Fintech startup integrating CS and Support metrics

Module 6: Leveraging Technology

- CRM platforms for success and support
- Automation and AI in support workflows
- Customer feedback and analytics tools
- Integrating systems for seamless collaboration
- **Case Study:** HealthTech firm using AI to predict churn

Module 7: Conflict Resolution and Customer Advocacy

- Handling escalations between teams
- Developing a customer-first culture

- Advocating internally for customer needs
- Strategies for preventing internal conflicts
- **Case Study:** SaaS company resolving repeated customer escalations

Module 8: Building a Unified Customer-Centric Organization

- Creating shared goals and vision
- Establishing playbooks for joint operations
- Continuous improvement through retrospectives
- Scaling collaboration across departments
- **Case Study:** Global enterprise implementing CS-Support integration

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com