

Candidate Name: _____
Role Interviewed: _____
Interviewer: _____
Date: _____

Dimensions

- **Strategic Customer Success Vision — Score (1–5): _____**
1-2: No clear strategy; responds reactively to customer issues without goals. 3: Defines annual goals, segments customers, and ties tactics to retention targets. 4: Builds multi-year plans with clear KPIs, priorities, and resource plans. 5: Creates a transformative, scalable vision that opens new revenue and market opportunities.
- **Customer Retention & Growth — Score (1–5): _____**
1-2: Misses retention targets and lacks expansion plays. 3: Consistently meets renewal targets and executes renewal processes. 4: Drives sustained net revenue retention improvements and repeatable expansion plays. 5: Creates market-leading NRR through scalable upsell and cross-sell motions.
- **Team Leadership & Talent Development — Score (1–5): _____**
1-2: Fails to hire, coach, or retain key contributors; high turnover. 3: Builds competent teams and provides regular coaching and feedback. 4: Develops leaders, reduces attrition, and establishes clear career paths. 5: Creates a high-performing leadership bench with succession plans and internal mobility.
- **Operational Execution & Scaled Processes — Score (1–5): _____**
1-2: Processes are undocumented and operations fail under scale. 3: Implements repeatable onboarding, renewal, and escalation processes. 4: Automates workflows and optimizes operations for efficiency at scale. 5: Designs resilient, measurable operations that scale globally with low friction.
- **Cross-functional Collaboration & Stakeholder Management — Score (1–5): _____**
1-2: Operates in silos and misses commitments with sales or product. 3: Maintains regular alignment with sales, product, and finance on priorities. 4: Drives joint GTM motions and proactively resolves cross-team blockers. 5: Transforms partnerships into predictable revenue contributors and strategic initiatives.

1-2: Lacks reliable metrics or ignores data when making decisions. 3: Uses core CS metrics (NRR, churn, CSAT) to inform actions and reviews. 4: Builds dashboards, segments customers, and runs experiments based on data. 5: Uses predictive analytics to identify risk and drive proactive strategy changes.

• **Customer Advocacy & Product Influence — Score (1–5): _____**

1-2: Rarely captures customer feedback or fails to influence product decisions. 3: Escalates major customer issues and contributes to roadmap discussions. 4: Systematically captures voice of customer and prioritizes product asks with ROI. 5: Shapes product strategy with customers, creating referenceable accounts and differentiation.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):