

• CS / AM LEADERSHIP • PLAYBOOK

The First 30 Days as a Customer Success Team Lead

A practical framework to move from “**strong individual contributor**” to a manager who creates clarity, ownership and predictable team performance.

30-DAY ROADMAP

TEAM DIAGNOSTIC

1:1 FRAMEWORK

KPI SCORECARD

DELEGATION MATRIX

DIFFICULT CONVERSATIONS

WEEKLY RHYTHM

● WHY THIS PLAYBOOK

Your role changes before your title does

The hardest part of becoming a Team Lead is rarely learning how to manage tasks. It is changing your role: you stop being the person who solves the problem and become the person who makes the team capable of solving it.

YOUR NEW SUCCESS METRIC

Not how much you personally deliver — but how reliably your team delivers without you being the bottleneck.

● THE 30-DAY OUTCOME

WEEK 1

Diagnose

People · customers · processes · risks

WEEK 2

Create clarity

Roles · priorities · expectations · KPIs

WEEK 3

Build ownership

Delegation · 1:1s · coaching · feedback

WEEK 4

Install rhythm

Team cadence · reporting · improvement loop

DIAGNOSE → CLARITY → OWNERSHIP → RHYTHM

INSIGHT

Most new leads try to do Week 1–4 in Week 1. Diagnosis before action is what prevents you from perfectly fixing the wrong problem.

Team Diagnostic — Before You Change Anything

Use this scorecard during your first week. Rate each area from 1 (unclear / risky) to 5 (healthy / predictable).

People

○ ○ ○ ○ ○

Strengths, motivation, skill gaps, overload

Customers

○ ○ ○ ○ ○

Top accounts, churn risks, escalations, relationship health

Process

○ ○ ○ ○ ○

Repeated manual work, bottlenecks, unclear ownership

Priorities

○ ○ ○ ○ ○

Too many “urgent” tasks?
Clear definition of success?

Performance

○ ○ ○ ○ ○

KPIs connected to outcomes, not activity alone

Communication

○ ○ ○ ○ ○

Where information gets lost or decisions stall

● ASK THESE 5 QUESTIONS

1 What is currently working well that I should not break?

2 Where do we lose the most time or customer value?

3 Which decisions still depend too much on the manager?

4 What does “great performance” look like for each role?

5 What problem would the team most like me to remove?

The 1:1 That Actually Develops People

A 1:1 should not become a status meeting. Status belongs in the operating system; 1:1s are for context, coaching and growth.

15 MIN

Human check-in

How are you? What is taking energy right now?

15 MIN

Business

What is blocked? What customer / team risk do you see?

15 MIN

Development

What skill or behavior would move you forward?

15 MIN

Ownership

What will you take ownership of before our next 1:1?

MANAGER RULE

Ask before advising. If you solve every problem in the room, you train the team to bring problems instead of solutions.

INSIGHT

If your 1:1s are the first thing you cancel when the week gets busy, that's not a scheduling problem — it's a priorities problem.

KPI Scorecard — Activity ≠ Impact

For CS / AM teams, combine leading indicators (what the team does) with outcome indicators (what changes because of it).

Customer health

LEADING

QBRs, proactive touches, risk reviews



OUTCOME

Retention / expansion / health trend

Execution

LEADING

Response & follow-up discipline



OUTCOME

Tasks delivered on time; fewer escalations

Relationship

LEADING

Stakeholder mapping, business reviews



OUTCOME

Trust, adoption, executive alignment

Team

LEADING

Coaching, 1:1s, knowledge sharing



OUTCOME

Autonomy, consistency, skill growth

A USEFUL TEST

For every KPI ask: "If this number improves, what business outcome should improve with it?"
If there is no clear answer, reconsider the KPI.

INSIGHT

Leading indicators tell you what to do next week.
Outcome indicators tell you whether last week's work actually worked.

Delegation Matrix

Delegate the decision, not just the task. Your goal is to increase the number of decisions the team can make without you.

LEVEL 1 Execute

Team member: follows a defined process. **Lead:** sets context + reviews.

LEVEL 2 Recommend

Team member: analyzes and proposes a solution. **Lead:** approves / challenges.

LEVEL 3 Decide

Team member: makes the decision within boundaries. **Lead:** stays informed.

LEVEL 4 Own

Team member: owns the outcome end-to-end. **Lead:** coaches + removes blockers.

RED FLAG

"I'll just do it faster myself." That may be true today. But repeated enough times, it guarantees you will still be doing it six months from now.

INSIGHT

Delegating the task keeps you busy. Delegating the decision is what makes you replaceable — and that is the actual goal of a Team Lead.

Difficult Conversation Script

Use this structure for missed expectations, performance issues or recurring behavior problems.

1 Observation — “I noticed that...”

Describe facts, not personality.

2 Impact — “The impact is...”

Connect behavior to customer, team or business.

3 Expectation — “What I need going forward is...”

Make the desired behavior measurable.

4 Perspective — “How do you see it?”

Listen before deciding what happens next.

5 Commitment — “What will you do differently?”

Agree on action + date for follow-up.

AVOID

“You need to be more proactive.”

BETTER

“For accounts marked at risk, I expect the owner to flag the risk, explain the reason and propose the next action before our weekly review.”

Your Weekly Operating Rhythm

A good management system makes the right conversations happen before problems become escalations.

WEEKLY

Team sync

Priorities · risks · decisions · wins

WEEKLY

1:1s

Coaching · blockers · development

WEEKLY

Customer / delivery review

Top risks · commitments · next actions

MONTHLY

Performance review

KPIs · patterns · capacity · improvement

QUARTERLY

Team retrospective

What to stop / start / continue

THE ULTIMATE GOAL IS SIMPLE

Clarity → **Ownership** → **Consistency** → **Customer Impact**

INSIGHT

A rhythm you don't have to remember to run is the difference between a system and a good intention.

● CHECKLIST

Your 30-Day Checklist

Print this page or keep it open — tick each box as you close it out.

- ☐ I know the top 3 risks for the team and customers.
- ☐ Every team member has clear ownership areas.
- ☐ I have a regular 1:1 rhythm in place.
- ☐ The team knows which KPIs matter and why.
- ☐ At least one recurring bottleneck has been removed.
- ☐ I have delegated a decision, not only a task.
- ☐ **The team can solve more problems without me than on Day 1.**

INSIGHT

This checklist isn't pass / fail. Revisit it every 30 days — what counts as “healthy” should keep moving as your team matures.

• WANT TO GO DEEPER?

This playbook is a starting point.

The real leverage comes from building a management system around your team's specific maturity, customers, product and business model — that's exactly what the Academy is for.

Explore the AM & CS Academy →

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