

Customer success hiring & onboarding scorecard

A practical framework for recruiting, onboarding, and ramping high-performing customer success team members.

This template helps CS leaders define what great looks like before a hire is made, assess candidates consistently during the recruitment process, and set new hires up for success once they join.

It's designed to create more structured hiring decisions, clearer onboarding expectations, and a stronger link between recruitment, ramp, and long-term retention.

Use it to align on the role, score candidates against the right attributes, build a more repeatable onboarding plan, and keep improving the process with feedback from every new hire.

The goal isn't just to fill a role. It's to build a stronger, more resilient CS team over time.

NB: Use this template as a working document. Revisit it after each hire so your process keeps improving and your team gets stronger over time.

1. Define the role clearly

Before assessing candidates, align on what the role actually requires in your team and business.

Job title	<i>Example: Customer Success Manager</i>
Team/region	<i>Example: EMEA customer success</i>
Customer segment	<i>Example: Mid-market SaaS customers</i>
Main responsibilities	<i>Example: Adoption, renewals support, QBRs, stakeholder management, internal feedback loops</i>
What success looks like in the first 6–12 months	<i>Example: Owns customer relationships independently, runs effective calls, drives adoption, and contributes useful customer feedback internally.</i>

2. Define the attributes you're hiring for

Identify the traits that matter most so interviews don't rely only on instinct or personality fit.

Examples of attributes	
Communication skills	<input type="checkbox"/>
Eagerness to learn	<input type="checkbox"/>
Curiosity	<input type="checkbox"/>
Creativity	<input type="checkbox"/>
Growth mindset	<input type="checkbox"/>
Proactive engagement	<input type="checkbox"/>
Ability to navigate ambiguity	<input type="checkbox"/>
Comfort giving and receiving feedback	<input type="checkbox"/>
Customer-centric thinking	<input type="checkbox"/>
Professionalism	<input type="checkbox"/>

Diversity of thought/background

Ability to think on their feet

Attribute	Why it matters for this role	Priority (High / Med / Low)
Curiosity	Our product spans multiple industries, so CSMs need to learn new customer contexts quickly.	High
Communication	This role depends on managing complex customer conversations with clarity and confidence.	High
Creativity	The CSM needs to propose new ways to solve customer problems and improve processes.	Medium

3. Align on company and team values

Make sure the interview process reflects both the company-wide culture and the reality of your team.

Company values we want to assess:

Example: Customer obsession, ownership, collaboration, learning mindset

Team values we want to assess:

Example: Curiosity, candid feedback, adaptability, creativity, accountability

What kind of team culture are we trying to build?:

Example: High feedback, high trust, lots of collaboration, and strong comfort with change.

4. Define what the interview process should test

Each interview stage should exist for a reason. Map what each stage is assessing before you begin hiring.

Interview stage	What it should assess	Owner	Example format
Recruiter screen	Motivation, communication, baseline fit	Talent/hiring manager	Intro call
Hiring manager interview	Curiosity, growth mindset, expectations	Hiring manager	Structured interview
Stakeholder interview	Cross-functional fit	Sales/product/peer	Panel interview
Mock customer call/exercise	Real-world skills	Hiring manager & team	Call simulation
Final interview	Culture fit and role clarity	Leadership	Final conversation

What practical exercise will best reflect the real job?:

Example: Run a mock customer call with an existing customer scenario, including an expansion opportunity and a risk to manage.

5. Candidate interview scorecard

Use a consistent scorecard so each interviewer is assessing candidates against the same expectations.

Attribute	Interview question / exercise	What good looks like	Score (1–5)	Notes
Curiosity	How do you like to learn?	Gives specific examples of how they seek out information and test new ideas		
Communication	Mock customer call	Clear, structured, adaptable, and customer-aware		
Growth mindset	Tell me about something you had to learn quickly	Shows ownership, reflection, and practical application		
Feedback culture fit	Tell me about a piece of feedback you received and how you acted on it	Open to feedback and not defensive		
Adaptability	Describe a situation with incomplete information	Comfortable navigating ambiguity and deciding anyway		

Overall recommendation:

Example: Strong yes

Why?:

Example: Strong communication, clear curiosity, and handled the mock scenario well, but needs coaching on commercial confidence.

6. Curiosity and learning signals

Look beyond what candidates say and assess how they actually show eagerness to learn.

They ask thoughtful follow-up questions	<input type="checkbox"/>
They reference books, podcasts, newsletters, or communities they learn from	<input type="checkbox"/>
They talk about experimenting or “tinkering”	<input type="checkbox"/>
They explain how they’ve taught themselves something new	<input type="checkbox"/>
They ask about how the company or team works, not just the role	<input type="checkbox"/>

Example interview prompt:

Example:.. How do you like to learn, and where do you usually go when you need to understand a new topic quickly?

What a strong answer might sound like:

Example: I usually start with podcasts and newsletters in the space, then I look for product documentation or examples, and I like to test things hands-on to see how they work.

7. Final hiring decision

Bring the interview feedback together and make a clear, documented decision.

Candidate name	<i>Example: Jane Smith</i>
Strengths	<i>Example: Excellent communicator, strong curiosity, clear ownership mindset</i>
Risks/development areas	<i>Example: Less experience with commercial conversations, but very coachable</i>
Would we trust this person with customers after onboarding? Why or why not?	<i>Example: Yes – because they communicate clearly, take feedback well, and show strong learning instincts.</i>
Final decision	<i>Example: Hire</i>

8. New hire onboarding plan

Give every new hire a structured path to confidence, while leaving room for real-world learning.

Week	Focus	Activities	Owner	Success signal
Week 1	Company & product basics	Meet core teams, complete LMS modules, review org structure	Manager/enablement	Understands company, product, and role
Week 2	Customer context	Shadow calls, review customer history, learn common use cases	Manager/peers	Can explain core customer goals
Week 3-4	Guided execution	Handle low-risk tasks with backup, join customer calls	Team lead	Starts asking strong practical questions
Week 5-8	Independent ownership	Own part of customer work with support	Manager	Runs customer interactions with confidence

Expected onboarding duration:

Example: 6-8 weeks structured, with a continued ramp for 6 months.

9. Ramp milestones

Define what getting up to speed actually looks like so expectations are clear.

Understands the product and customer use cases	<input type="checkbox"/>
Can navigate internal systems	<input type="checkbox"/>
Can run a customer call with support	<input type="checkbox"/>
Can set an agenda for a customer meeting	<input type="checkbox"/>
Can summarize next steps and follow up clearly	<input type="checkbox"/>
Knows when to escalate and when to act independently	<input type="checkbox"/>
Understands key success metrics for the role	<input type="checkbox"/>

Timeframe	What they should be able to do	Example
30 days	Understand basics and contribute with support	Join customer calls, summarize notes, handle follow-ups
60 days	Manage low-risk work independently	Run smaller customer check-ins with manager

		backup
90 days	Own customer work more confidently	Lead core interactions, identify risks and opportunities

10. Ongoing learning and development

Onboarding is only the beginning. Strong teams create structured ways to keep people learning.

- Product certifications
- Sales or discovery training
- External trainers
- Subject matter expertise tracks
- Stretch projects
- Peer shadowing
- Quarterly feedback and growth planning

Development area	Why it matters	Opportunity/ training	Owner	Timeline
Commercial confidence	Improve expansion conversations	Sales skills course	Manager	Q2
Product expertise	Build credibility with customers	Certification module	Enablement	Q2
Leadership skills	Prepare for their next role	Stretch project	Manager	Q3

11. Feedback and onboarding review loop

The best onboarding plans improve with every new hire.

New hire reviews onboarding at the end of the process	<input type="checkbox"/>
Manager reviews what worked vs what didn't	<input type="checkbox"/>
Feedback is captured in a repeatable format	<input type="checkbox"/>
Process is updated at least annually	<input type="checkbox"/>
Regional/team differences are considered	<input type="checkbox"/>

Area	What worked well	What was missing	What should change next time?
Product training	<i>Clear intro to core features and use cases</i>	<i>Real customer scenarios showing how features are used in practice</i>	<i>Add recorded customer calls or walkthroughs showing real-world usage</i>

Customer exposure	<i>Early shadowing helped build confidence quickly</i>	<i>Exposure to renewal and expansion conversations</i>	<i>Introduce renewal call shadowing in weeks 3–4, not just onboarding calls</i>
Internal systems	<i>CRM training was structured and easy to follow</i>	<i>How systems connect together (CRM & support & product data)</i>	<i>Add a “day in the life” walkthrough showing how tools are used together</i>
Regional context	<i>Global overview of customers</i>	<i>Local nuances (e.g., how customers behave in EMEA vs US)</i>	<i>Add region-specific onboarding modules or peer sessions</i>
Cross-functional collaboration	<i>Met key stakeholders early (sales, support, product)</i>	<i>Clarity on when and how to involve each team</i>	<i>Add clear “who to go to for what” scenarios and examples</i>

12. Long-term retention and growth check

High-performing teams are built not just by hiring well, but by keeping people engaged, challenged, and growing.

- Team members know what growth looks like
- Feedback is frequent, not just annual
- People are encouraged to challenge ideas
- New projects and stretch work are available
- Subject matter expertise is recognized
- Managers create psychological safety

Where could this role grow next?

Example: Enterprise CSM, strategic account management, product specialist, people management, or CS operations.
