

MARKETING & COMMUNICATION | COURSE BROCHURE

Customer Success Management for B2B and SaaS

5 days | Classroom training | English

SMART HORIZON

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London W2 6BD, United Kingdom

Explore current programmes

https://smarthorizon.uk



Course content

Why attend

Customer success ensures that customers achieve their desired outcomes, driving retention and expansion. This course covers customer success strategy, onboarding, health scores, success plans, renewals and expansion, churn prevention, team structure and metrics.

In subscription businesses, revenue depends on renewals and growth. This course helps you build a customer success function that drives loyalty and revenue.

Professional Problems This Course Is Designed to Solve

• Difficulty translating subject knowledge into practical workplace decisions.
• Inconsistent approaches to the activities covered in the course outline.
• Lack of a structured plan for applying and reviewing new skills.

Course methodology

The course uses case studies, health score design, success plan workshops and renewal role plays.

Course objectives

By the end of this course, participants will be able to:
• Explain the role and value of customer success
• Design effective onboarding programmes
• Build customer health scores
• Create success plans and business reviews
• Manage renewals, expansion and churn risk
• Structure and measure customer success teams

Target audience

This course is suitable for:
• Customer success managers
• Account managers
• SaaS and subscription business leaders
• Customer service managers
• Sales leaders



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Target competencies

Participants will develop competencies in:

- Customer success strategy
- Onboarding
- Health scoring
- Success planning
- Renewal management
- CS metrics

Course outline

Day 1: Customer Success Foundations

09:00–09:54	Customer success versus support
09:54–10:48	Subscription economics
10:48–11:00	Customer outcomes
11:00–11:30	**Coffee break**
11:30–12:12	Customer outcomes (continued)
12:12–13:06	CS maturity
13:06–14:00	Exercise: Outcome mapping

Day 2: Onboarding

09:00–09:54	Onboarding journeys
09:54–10:48	Time to value
10:48–11:00	Adoption
11:00–11:30	**Coffee break**
11:30–12:12	Adoption (continued)
12:12–13:06	Handover from sales
13:06–14:00	Workshop: Onboarding design



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Day 3: Health and Success Plans

09:00–09:54	Health score design
09:54–10:48	Usage data
10:48–11:00	Success plans
11:00–11:30	**Coffee break**
11:30–12:12	Success plans (continued)
12:12–13:06	Business reviews
13:06–14:00	Exercise: Health score

Day 4: Renewals and Expansion

09:00–09:54	Renewal process
09:54–10:48	Expansion opportunities
10:48–11:00	Churn signals
11:00–11:30	**Coffee break**
11:30–12:12	Churn signals (continued)
12:12–13:06	Save strategies
13:06–14:00	Role play: Renewal conversation

Day 5: Team and Metrics

09:00–09:54	Team structure and coverage
09:54–10:48	Tools and automation
10:48–11:00	CS metrics
11:00–11:30	**Coffee break**
11:30–12:12	CS metrics (continued)
12:12–13:06	Cross-functional collaboration
13:06–14:00	Capstone: Customer success plan

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the



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sessions. They are indicative only and do not constitute a binding commitment.

Dates, venues and fees

Current published course plans. Fees are per participant in GBP, excluding unconfirmed taxes.

Venue	Start date	End date	Fee (GBP)
Istanbul Confirmed dates	16 Nov 2026	20 Nov 2026	**£2,650.–**
Online Confirmed dates	16 Nov 2026	20 Nov 2026	**£1,250.–**
Cape Town Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,890.–**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,250.–**
Amsterdam Confirmed dates	7 Dec 2026	11 Dec 2026	**£2,540.–**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.–**
Singapore Confirmed dates	14 Dec 2026	18 Dec 2026	**£2,820.–**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
London Confirmed dates	4 Jan 2027	8 Jan 2027	**£2,450.–**
Online Confirmed dates	4 Jan 2027	8 Jan 2027	**£1,250.–**
Dubai Confirmed dates	18 Jan 2027	22 Jan 2027	**£3,150.–**
Online Confirmed dates	18 Jan 2027	22 Jan 2027	**£1,250.–**
Frankfurt Confirmed dates	1 Feb 2027	5 Feb 2027	**£2,650.–**
Online Confirmed dates	1 Feb 2027	5 Feb 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	15 Feb 2027	19 Feb 2027	**£1,450.–**
Online Confirmed dates	15 Feb 2027	19 Feb 2027	**£1,250.–**
Cape Town Confirmed dates	22 Feb 2027	26 Feb 2027	**£1,890.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**£1,250.–**
Paris Confirmed dates	1 Mar 2027	5 Mar 2027	**£2,860.–**
Online Confirmed dates	1 Mar 2027	5 Mar 2027	**£1,250.–**
Istanbul Confirmed dates	15 Mar 2027	19 Mar 2027	**£2,650.–**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,250.–**
Amsterdam Confirmed dates	5 Apr 2027	9 Apr 2027	**£2,540.–**
Online Confirmed dates	5 Apr 2027	9 Apr 2027	**£1,250.–**
Singapore Confirmed dates	19 Apr 2027	23 Apr 2027	**£2,820.–**
Online Confirmed dates	19 Apr 2027	23 Apr 2027	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Rome Confirmed dates	26 Apr 2027	30 Apr 2027	**£2,450.-**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**£1,250.-**
London Confirmed dates	3 May 2027	7 May 2027	**£2,450.-**
Online Confirmed dates	3 May 2027	7 May 2027	**£1,250.-**
Dubai Confirmed dates	17 May 2027	21 May 2027	**£3,150.-**
Online Confirmed dates	17 May 2027	21 May 2027	**£1,250.-**
Frankfurt Confirmed dates	7 Jun 2027	11 Jun 2027	**£2,650.-**
Online Confirmed dates	7 Jun 2027	11 Jun 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,450.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.-**
Rome Confirmed dates	28 Jun 2027	2 Jul 2027	**£2,450.-**
Online Confirmed dates	28 Jun 2027	2 Jul 2027	**£1,250.-**
Paris Confirmed dates	5 Jul 2027	9 Jul 2027	**£2,860.-**
Online Confirmed dates	5 Jul 2027	9 Jul 2027	**£1,250.-**
Istanbul Confirmed dates	19 Jul 2027	23 Jul 2027	**£2,650.-**
Online Confirmed dates	19 Jul 2027	23 Jul 2027	**£1,250.-**
Amsterdam Confirmed dates	2 Aug 2027	6 Aug 2027	**£2,540.-**
Online Confirmed dates	2 Aug 2027	6 Aug 2027	**£1,250.-**



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Dates, venues and fees (continued)

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Singapore Confirmed dates	16 Aug 2027	20 Aug 2027	**£2,820.-**
Online Confirmed dates	16 Aug 2027	20 Aug 2027	**£1,250.-**
Vienna Confirmed dates	30 Aug 2027	3 Sept 2027	**£2,940.-**
Online Confirmed dates	30 Aug 2027	3 Sept 2027	**£1,250.-**
London Confirmed dates	6 Sept 2027	10 Sept 2027	**£2,450.-**
Online Confirmed dates	6 Sept 2027	10 Sept 2027	**£1,250.-**
Dubai Confirmed dates	20 Sept 2027	24 Sept 2027	**£3,150.-**
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.-**
Frankfurt Confirmed dates	4 Oct 2027	8 Oct 2027	**£2,650.-**



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Dates, venues and fees (continued)

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Online Confirmed dates	4 Oct 2027	8 Oct 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	18 Oct 2027	22 Oct 2027	**£1,450.–**
Online Confirmed dates	18 Oct 2027	22 Oct 2027	**£1,250.–**
Barcelona Confirmed dates	25 Oct 2027	29 Oct 2027	**£2,840.–**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**£1,250.–**
Paris Confirmed dates	1 Nov 2027	5 Nov 2027	**£2,860.–**
Online Confirmed dates	1 Nov 2027	5 Nov 2027	**£1,250.–**
Istanbul Confirmed dates	15 Nov 2027	19 Nov 2027	**£2,650.–**
Online Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,250.–**



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Dates, venues and fees (continued)

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Amsterdam Confirmed dates	6 Dec 2027	10 Dec 2027	**£2,540.-**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.-**
Singapore Confirmed dates	13 Dec 2027	17 Dec 2027	**£2,820.-**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**£1,250.-**

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon UK certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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View the latest course details online