CHURNZERO

6TH ANNUAL

Customer Revenue Leadership Study

In partnership with

6sense · Customer Success Meetup · Onramp · Outreach · Pavilion · Success in Black · Success Venture Partners

Welcome to the 6th annual Customer Revenue Leadership Study.

When most of your revenue growth is driven after the initial sale, everything changes. Retention, adoption, and expansion are no longer supporting acts. Now, they are the plan.

In our sixth annual Customer Revenue Leadership Study, 74% of respondents report that most of their company's revenue comes from existing customers.

In the era of customer-driven growth, the questions that matter change. Are customers achieving value quickly? Are they using the product deeply? Are renewals and expansions managed with the same rigor as new business?

Customer-driven growth also resets the operating agenda, with team design moving to the foreground.

2025 is a baseline year. After two years of erosion, NRR and GRR have stabilized. In a steadier market, your success reflects choices that you control. How you staff, instrument, and run your post-sale engine matters more than macro noise.

Your goals and metrics need to align with customer goals—time to value, product adoption, realized ROI—not your team's activity. Your technology stack must make this work repeatable, measurable, and scalable.

This report, based on data from 793 customer growth leaders, shows the patterns behind stronger revenue performance. Teams that staff core roles well—enablement, customer success managers, support, and account management—lift NRR. Leaders with a customer-data-centric stack perform better. AI is in the early stages for most teams, with clear upside once it is wired into clean data and owned workflows.

Customer-driven growth rewards operating discipline. Use this report to benchmark where you are today, choose the moves that matter most, and commit.

Your growth hinges on the customers you already have.

You Mon Tsang
CEO and Co-founder, ChurnZero

Demographics

- Number of participants: 793
- Most common titles: 32% Sr. Director/Director; 31% EVP, SVP, or VP
- Department managed: 70% customer success, 14% sales, and 16% both sales and CS
- Most common business age: 6-10 years (30%)

All responses were voluntary.

Special thanks to Sara Boostani, marketing research analyst at 6sense, for doing the analysis, and Kerry Cunningham, head of research & thought leadership at 6sense, for the ongoing partnership with this study.

Key findings

- **Customer-driven growth is the rule:** 74% of participants report that most of their revenue comes from existing customers, meaning that post-sale execution is a topline priority.
- **Retention turns the corner:** After a 2022–2024 decline, net revenue retention (NRR) and gross revenue retention (GRR) are stabilizing in 2025.
- **Buying cycles thaw:** Fewer teams report 6+ month delays; more teams report that business is moving along as normal.
- **The makeup of your team can lift NRR:** The presence of enablement, CSM, support, and account management roles is associated with higher NRR.
- **CS stays resilient; sales is under strain:** Both CS and sales are growing, but CS is growing on steadier ground, while sales is facing budget pressure.
- **Tech stack strength correlates to higher NRR:** The presence of CRM, CSP, LMS, and support software is all connected to higher NRR.
- **AI use is still in early stages:** Most teams are in exploration/tactical stages.
- **Customer lifecycle goals are focused on revenue metrics.** Goals are geared toward revenue, not activity.

“*Customer success as we know it is changing before our eyes. I’m grateful to have partnered with the wonderful team at ChurnZero to produce this work—the richest data set yet on where the profession is today and where it’s headed.”*

– **John Gleeson, Founder & General Partner, Success Venture Partners**

ECONOMIC CONDITIONS

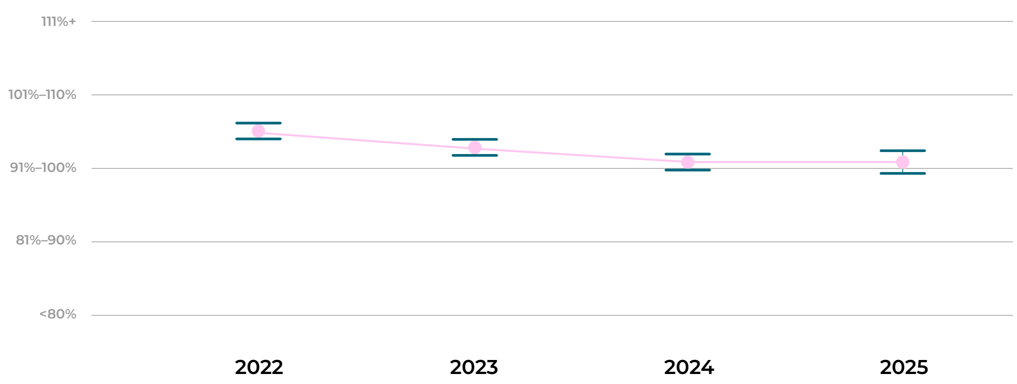
Insight: As NRR and GRR stabilize, refocus on operations.

After two years of erosion, retention has steadied. Net revenue retention (NRR) fell from 2022 through 2024 and then stabilized in 2025. Gross revenue retention (GRR) remains steady as well.

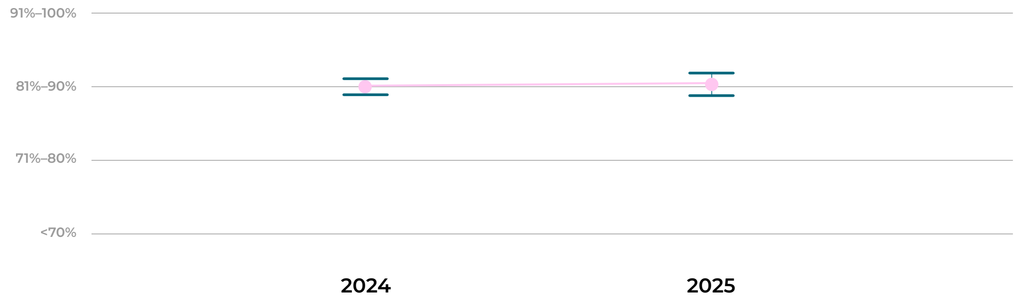
Together, this suggests SaaS organizations have adapted to the post-2022 environment.

This means that 2025 can be treated as a baseline year for planning and benchmarking. With volatility lower, your strategies, tactics and operations will have more of an impact on your success than external pressures.

NRR (2022–2025)



GRR (2024–2025)



Why does stabilization matter?

In a turbulent market, swings in NRR/GRR can mask the impact of day-to-day execution. In a stable one, they are more likely to reflect choices you control.

Treat this period as a calibration window. Instead of asking, “What is the market doing to us?” think, “What are we doing that moves the needle?” The answer will be found in how you staff, instrument, and run your post-sale engine.

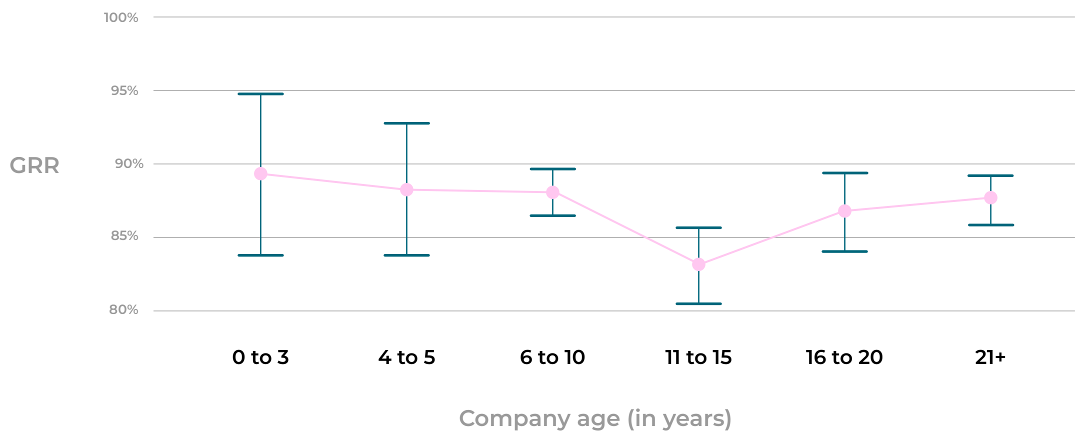
Watch out for the mid-life crisis.

Companies 6 to 10 years old report NRR at 100%, while those 11+ years old report 93% to 94%. GRR, meanwhile, follows a mild U-shape: Organizations that have been in business for 6 to 10 years and 21+ years report reliably higher GRR (88% for both) than organizations who have been in business 11 to 15 years (83%).

A possible reading of this data is that these companies are experiencing a “mid-life complexity” crisis. As products, processes, and portfolios expand, processes and services can falter before being engineered back out at maturity.

For mid-stage companies, the prescription is straightforward: double down on enablement, process rigor, and coverage to keep customers realizing value.

GRR and company age



THE ECONOMY

Insight: The macroeconomic environment is easier, but still consequential.

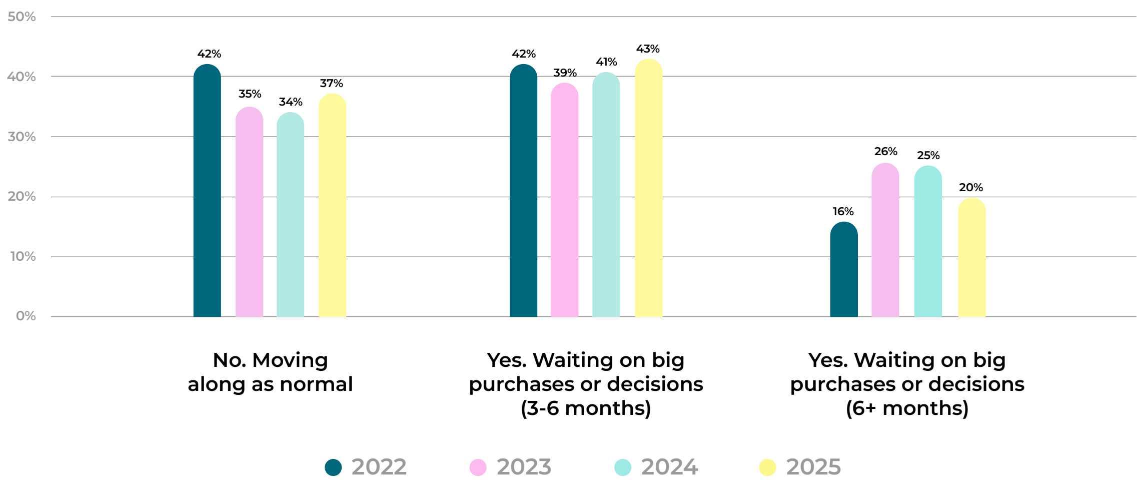
Buying cycles are thawing but buying readiness still divides performance.

Economic conditions improved versus 2024: Fewer leaders report 6+ months in purchasing/decision-making delays (20% in 2025 vs. 25% in 2024) and more say business is “moving along as normal” (37% in 2025 vs. 34% in 2024).

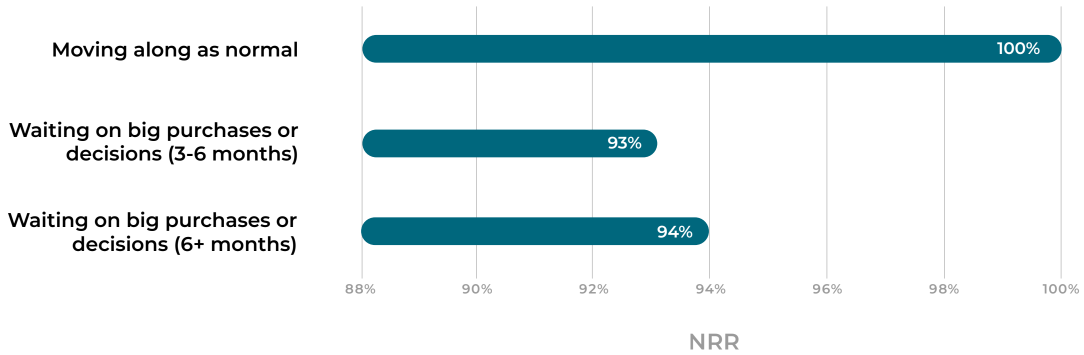
That said, there is a correlation between buying/decision-making readiness and revenue. Teams operating normally report NRR = 100%, while those facing delays report NRR = 93% (3–6 months) and NRR = 94% (6+ months).

Are healthier NRR numbers loosening budget and decision delays, or is renewed spending lifting NRR? The answer likely varies by segment and price point. Watch whether cycle-time improvements precede NRR gains or follow them, and use cohort analysis to see which dynamic dominates in your business.

Is the current economic climate changing your purchasing or business decisions?



Purchasing/decision-making and NRR



How to leverage buying readiness insights.

In a year when retention has stabilized, the broader buying/decision-making readiness is a practical divider of results. It shapes renewal timing, the level of proof required to secure commitments, and the feasibility of expansions.

Treat buying/decision-making readiness as a leading indicator for risk and forecast accuracy: it explains when customers will buy and what evidence they need to buy.

1. **Instrument buying readiness.** Use AI solutions that better predict and categorize buyer readiness and/or weave into health scoring.
2. **Match plays to readiness.**
   - Normal: Move forward with renewal and expansion engagements.
   - 3–6 months: Lead with time-to-value and cost-reduction stories.
   - 6+ months: Protect GRR, tighten adoption and executive alignment.
3. **Use status in forecasting.** Segment pipelines and renewal cohorts by buying readiness to inform predictability and staffing plans.

TEAM COMPOSITION

Insight: The roles that lift NRR.

We asked participants to describe their current customer go-to-market team and who leads the team.

We found that whether a customer go-to-market team reports to a single executive or multiple executives doesn't make a meaningful difference to NRR or GRR. However, the presence of certain roles within the team does.

Here are the key roles that stand out for their association with stronger NRR:

- Customer enablement: 99% NRR with the function present vs. 94% without.
- Customer success managers (CSMs): 98% when present vs. 90% without.
- Support: 98% when present vs. 93% without.
- Account management: 98% when present vs. 94% without.

Staff your team to win.

The presence of CSM + support + enablement (and account management when your expansion lives on the sales side) correlates with NRR lifts. These are your must-have roles. Treat them as your minimum viable team for customer growth.

Don't over-rotate on structure. Since NRR and GRR don't differ by single vs. multiple executive models, focus your leadership energy on role coverage, playbooks, and system adoption.

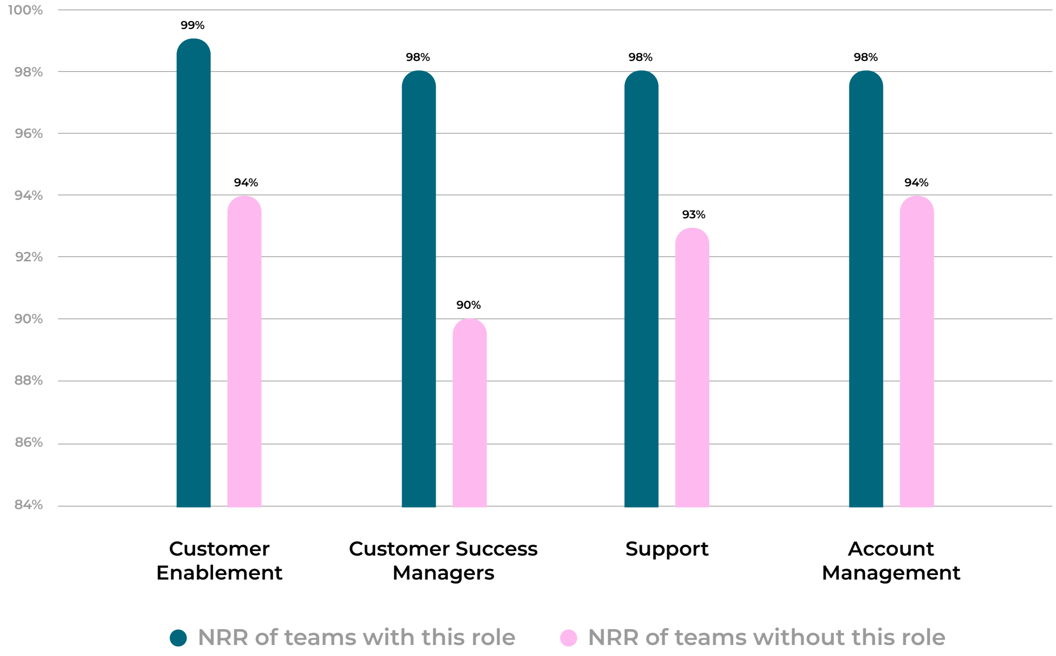
Contextualize renewal teams.

Our data also indicates that having a dedicated renewals function correlates with lower NRR (93% with vs. 97% without). However, this is likely because companies tend to formalize renewals when risk or complexity is already high, which has been true for many SaaS businesses over the last few years.

If you use a dedicated renewals team, treat it as a risk response and pair it with deeper enablement and adoption programs to address the underlying drivers of lower NRR.

Which roles make up your customer go-to-market team?

Roles that impact NRR



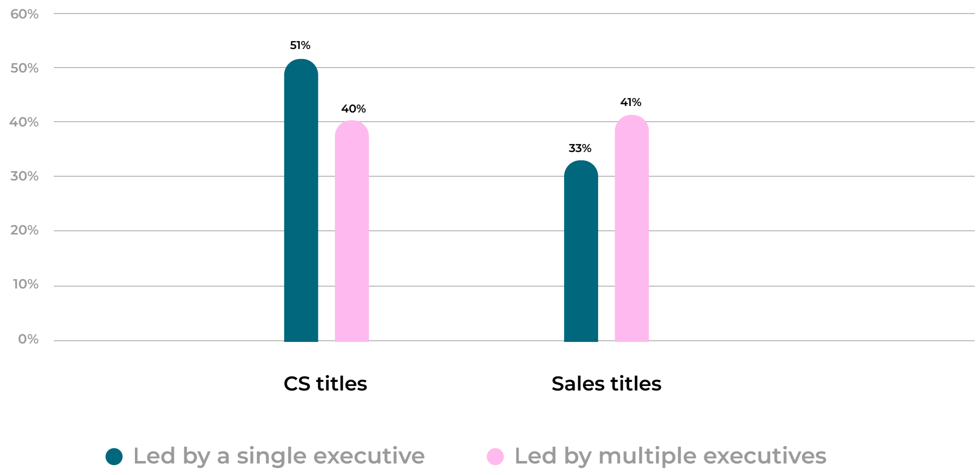
Executive makeup: Evenly split.

In many companies, responsibility for the customer growth team is shared across senior roles and is almost evenly split between CS and sales.

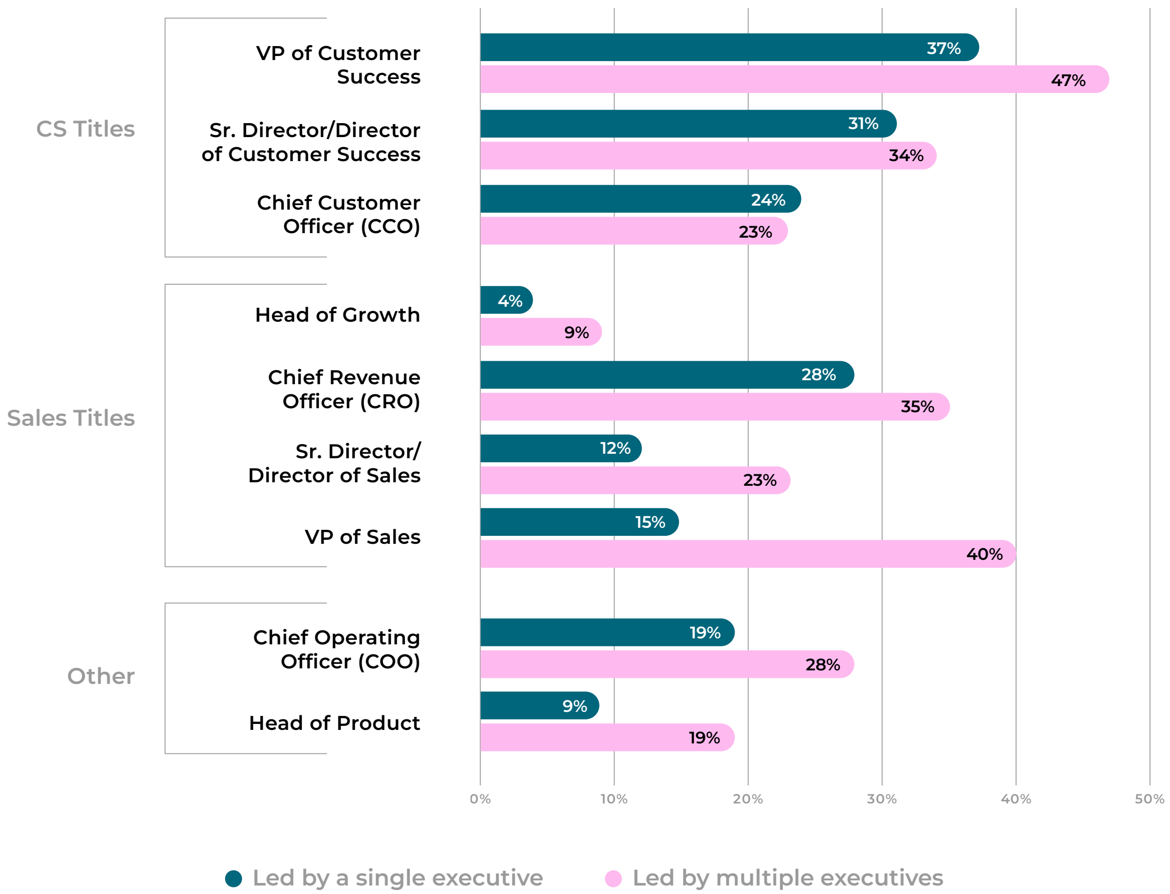
VPs/directors of CS appear most frequently, with CRO/sales leaders also common, reflecting the pragmatic mix you'd expect. There's likely some overlap in counts because respondents could choose multiple titles if responsibility is shared.

What is the organizational structure of your customer go-to-market team?

High-level roll up of customer go-to-market team leadership titles



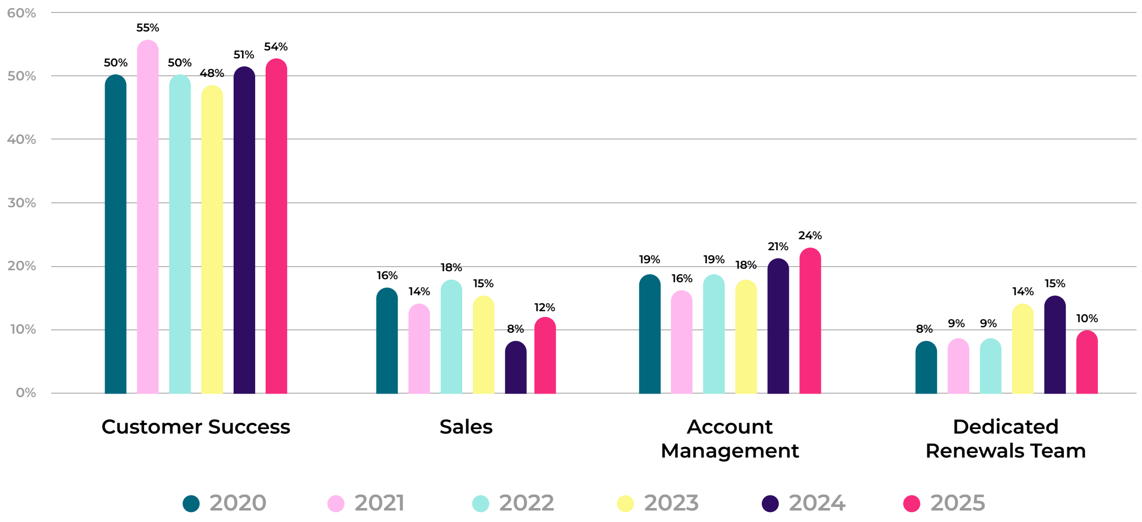
Executive breakdown (by title) of customer go-to-market team



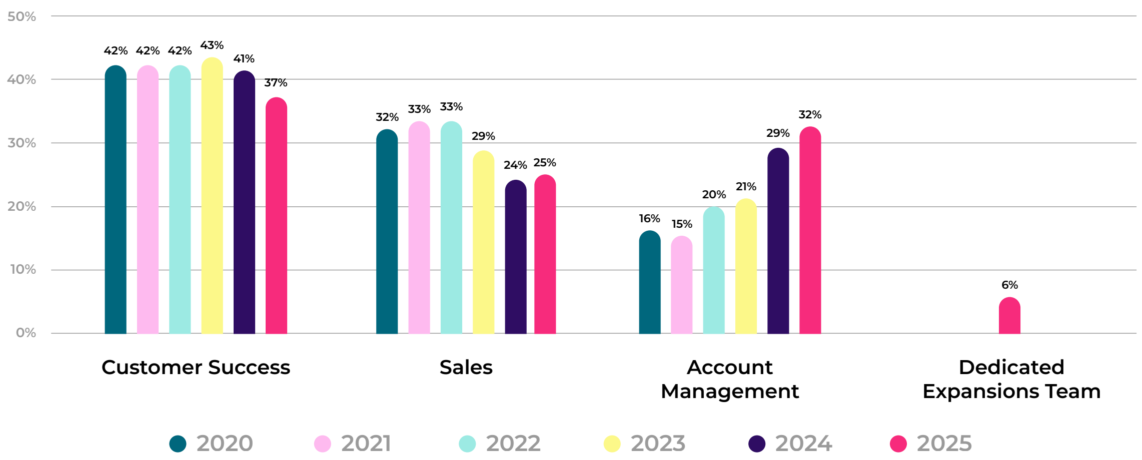
A deeper look into revenue ownership.

Continuing a trend we have seen over the last six years of the study, most participants report that CS typically owns the renewal process, while sales/account management focus on expansions.

2020–2025: Which function on the customer go-to-market team is primarily responsible for renewal revenue?



2020–2025: Which function on the customer go-to-market team is primarily responsible for expansion revenue?



The dedicated expansion team option was added to the survey this year.

What's the difference between CSMs and account managers?

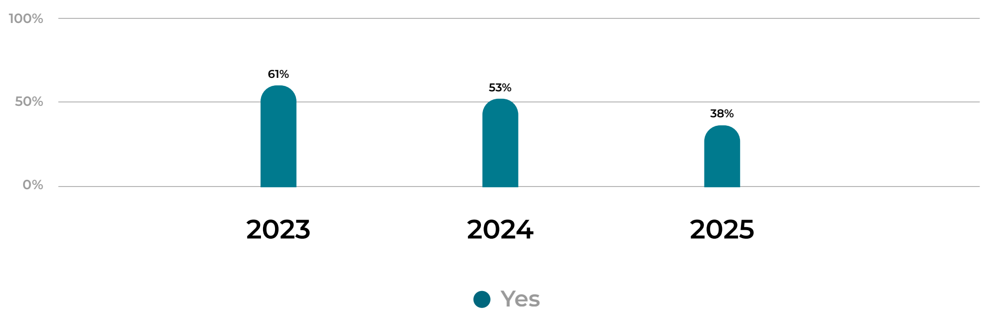
Traditionally, the role of the CSM is strategic and operational, focused on ensuring product adoption and value realization. They manage the customer's success with the solution.

Account management is primarily commercial, focused on renewals, upsells, and contract growth. They manage the business relationship.

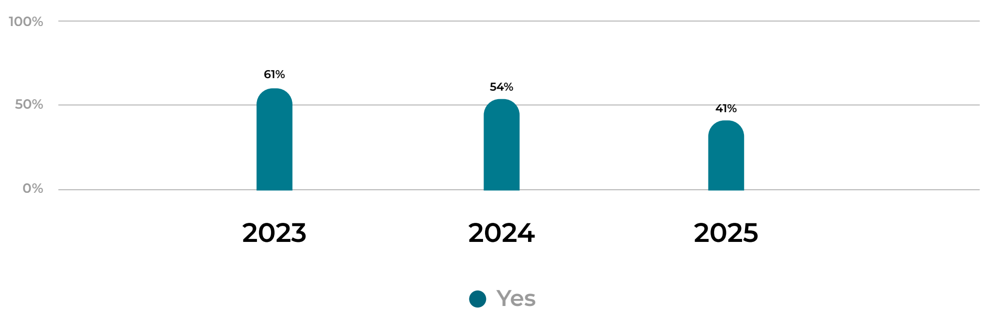
Underinvestment warning: Customer marketing & CS operations keep shrinking.

The past three years of data show a notable drop in customer marketing and CS operations roles. These roles are scale levers for retention and expansion, managing lifecycle programs, advocacy, segmentation, signal-to-play routing, data hygiene, and overall automation efforts. These cuts can create lagging drag on revenue: fewer activated users, slower value realization, thinner champions, and weaker upsell that may put pressure on NRR in the longer term.

Do you have a customer marketing function?



Do you have a dedicated operations role to support customer success?



BUDGET AND HEADCOUNT

Insight: CS teams are holding steady; sales teams are under strain.

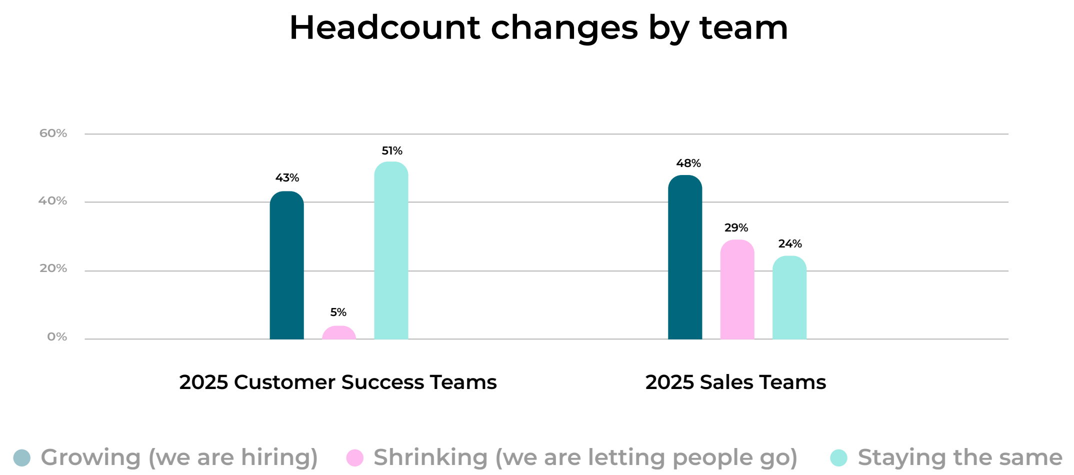
Both CS and sales are growing—but CS is growing on steadier ground.

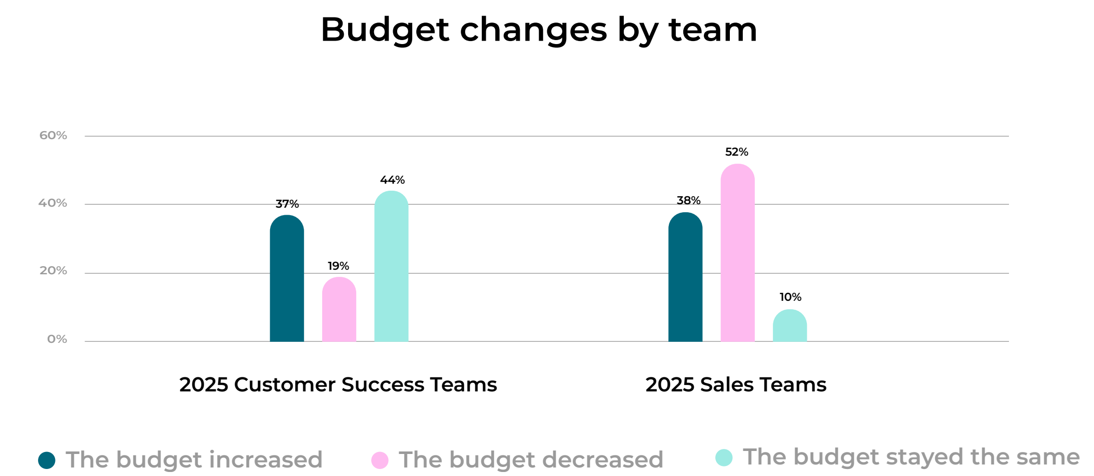
When looking at headcount and budget, we ask respondents first to identify if they managed customer success only, sales only, or both. We analyzed the results by the department they managed for greater clarity.

51% of customer success leaders say their headcount stayed the same and 43% say it grew. Sales show more strain: while 48% of sales leaders report team growth, 29% of sales leaders report staff reductions this year.

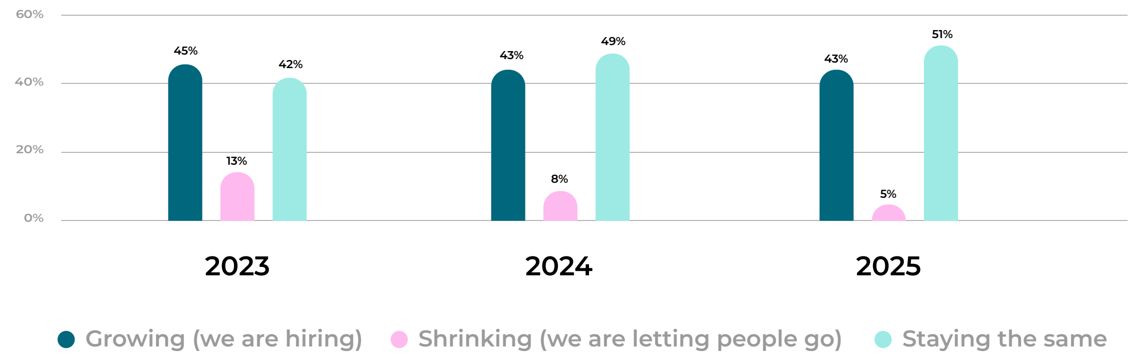
When it comes to budgets, 37% of CS leaders report budget increases compared to 38% of sales teams. Again, however, sales teams are seeing more decreases (52% of sales leaders report budget decreases vs. 19% for CS).

CS budget increases are up 48% year over year vs. 2024*, another stability marker. *Historical deltas are available only for CS.

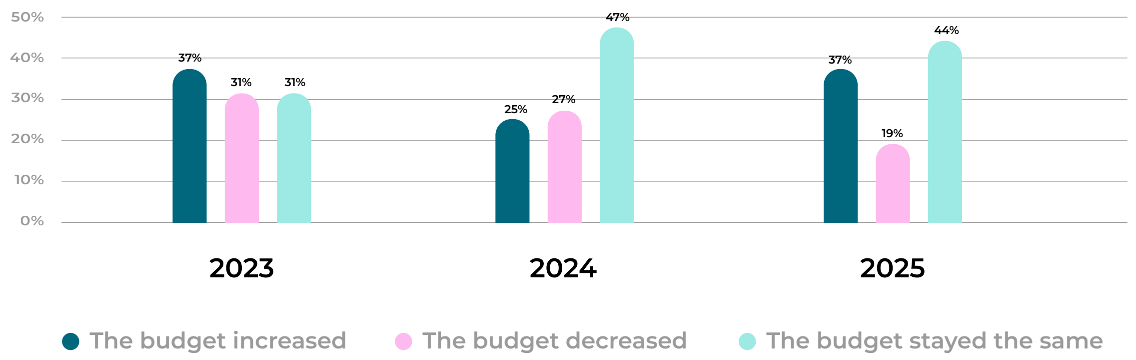




Staff changes 2023–2025 (customer success leaders)



Budget changes 2023–2025 (customer success leaders)



Focus efforts on payback.

Where sales budgets are down, shift your efforts toward efficiency plays (win rate enablement, deal quality, multi-threading) and CS programs with short time to value (adoption accelerators, value realization).

TECHNOLOGY

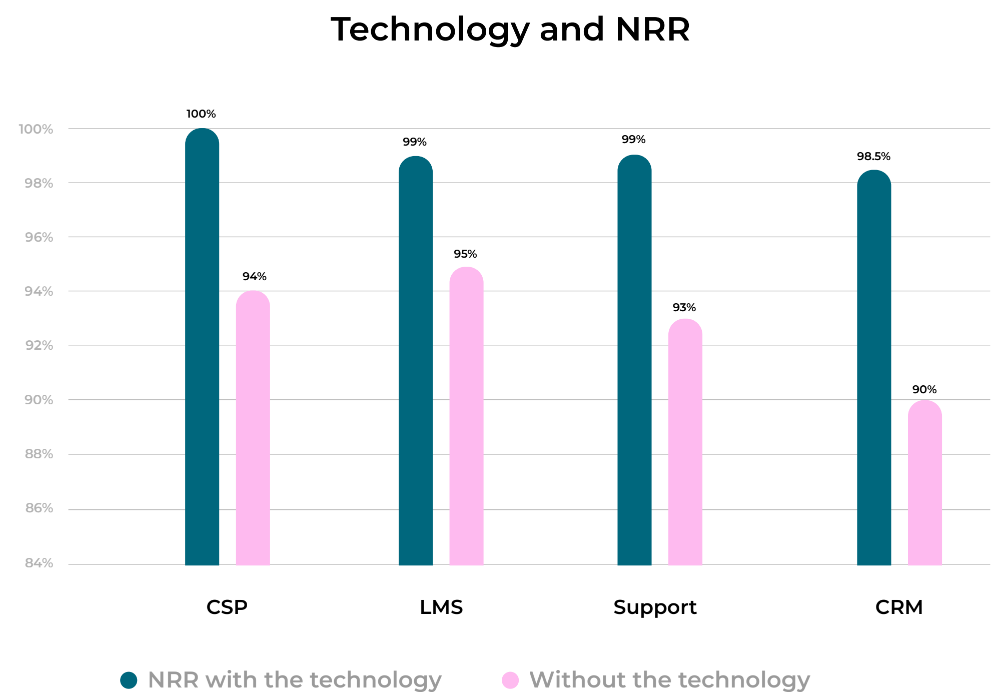
Insight: The tools you use can impact NRR.

Tech strength matters.

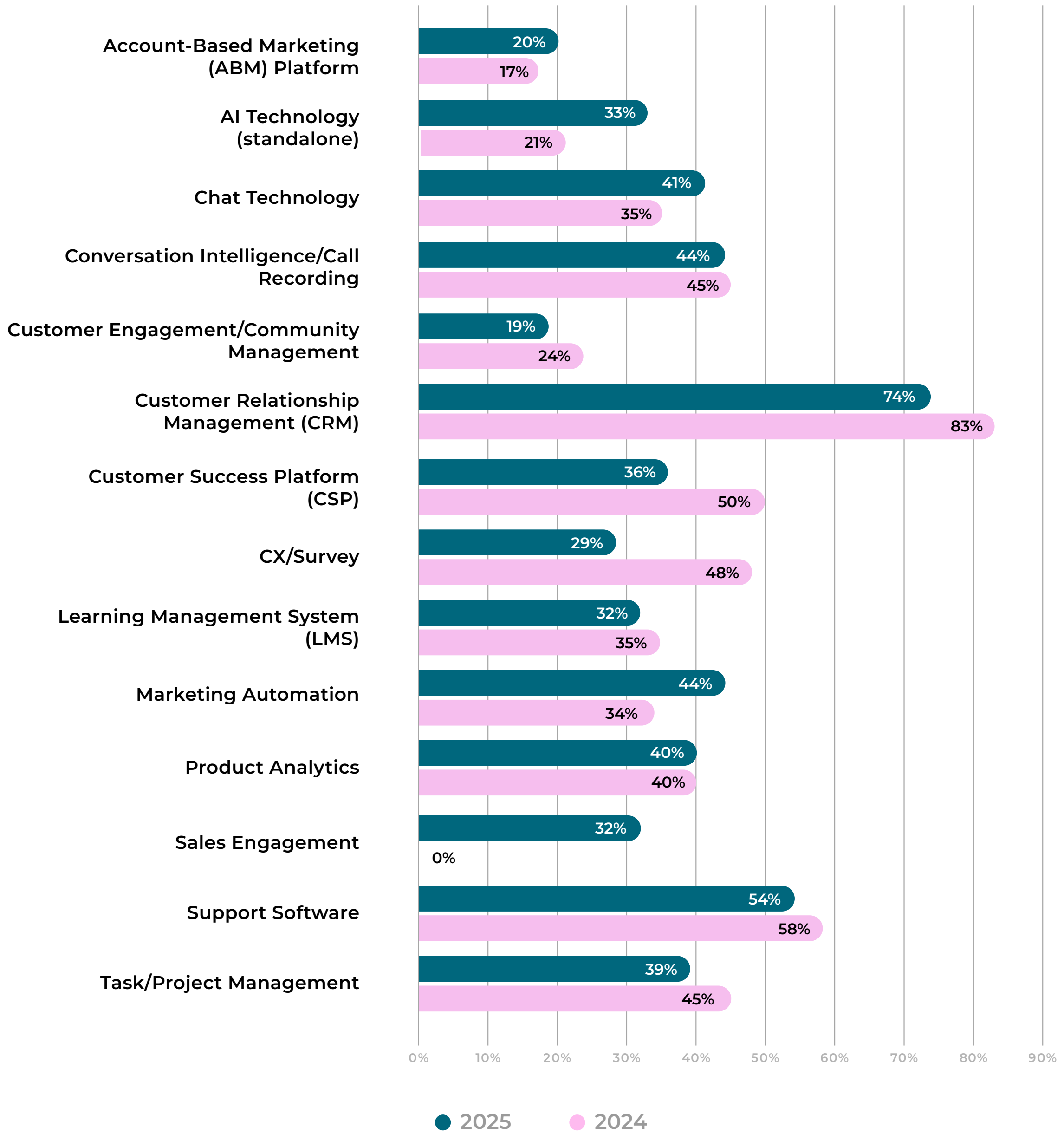
One pattern in our data indicates that a strong, customer-data-centric stack correlates with higher NRR.

Teams using a CRM report NRR at 98.5% vs. 90% without; CSP 100% with vs. 94% without; LMS 99% with vs. 95% without; and support software 99% with vs. 93% without.

As it stands, however, usage of all the software above has dropped since last year.



2024–2025: What does your customer go-to-market tech stack look like?



Perceived most impactful technology.

Interestingly, the tools that have the most impact are not perceived that way. Only 9% of respondents selected LMS technology as a top tool to grow revenue, and 13% listed support software. More disconcerting is that only 34% of respondents chose CSPs, purpose-driven solutions designed for customer growth.

Check the top three tools that have the most impact on your team's ability to grow customer revenue.

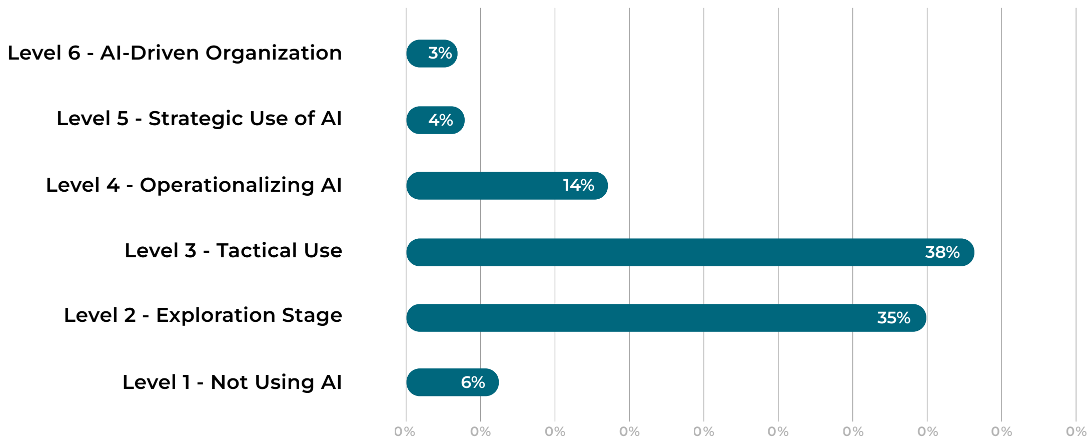
Technology should follow use case.

- **Tie technology to goals.** CRM = opportunity accuracy; CSP = renewals, relationship/health scores, satisfaction, NRR; LMS = activation/time-to-value; Support = risk detection & deflection.
- **If customer retention is a priority, make your CSP the hub.** Unify product, CRM, support, LMS, billing, and survey data in one system for the most comprehensive overview of the customer.

Insight: AI maturity is still nascent.

Most organizations are still in the exploration or tactical use phase of AI. Interestingly, younger companies have the largest percentage of non-AI users, as do companies with $250M–$499M in revenue, which perhaps contributes to the mid-life complexity crisis we highlighted earlier.

How would you rate your customer go-to-market team's current maturity level in applying AI to your customer growth strategies?

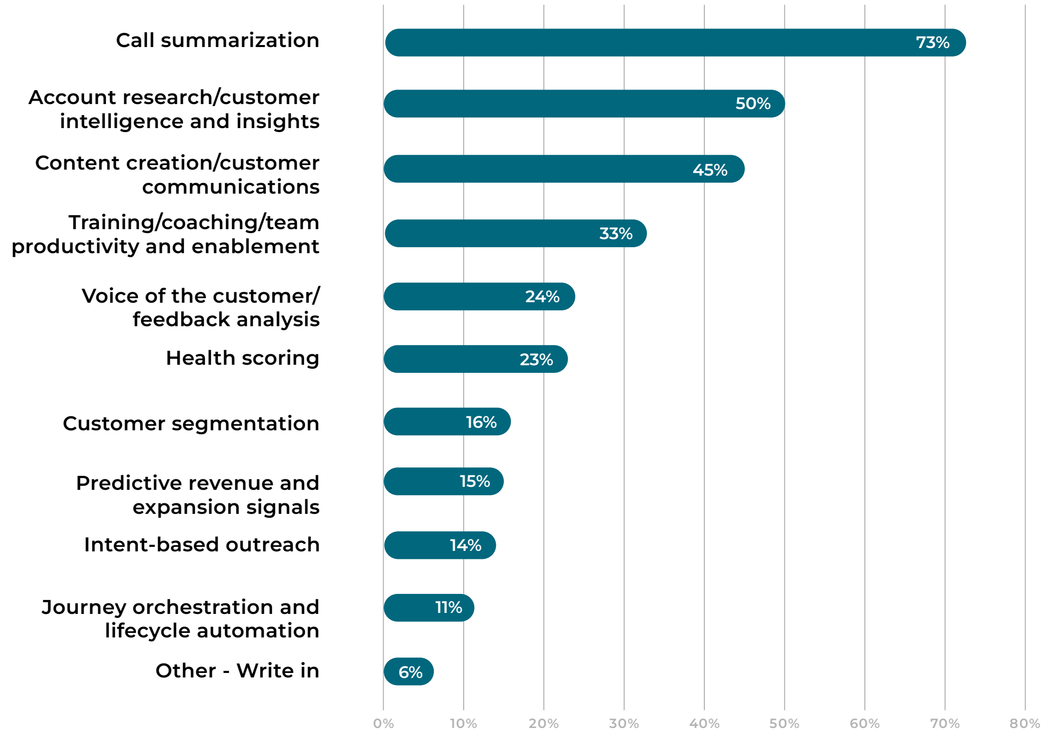


How do teams use AI?

The most widespread AI use cases focus on immediate productivity gains: call summarization (73%), account research/customer intelligence (50%), content/communications (45%), and training/coaching (33%).

Far fewer teams have moved into revenue-driving automation: customer segmentation (16%), predictive expansion signals (15%), intent-based outreach (14%), and journey orchestration (11%).

How are you using AI within the customer lifecycle?



ChurnZero can help.

ChurnZero's AI-powered customer growth software employs AI agents that analyze customer data from all sources to provide key insights into dynamics that influence revenue—customer health, relationship health, trends—as well as offering productivity gains with summarization, content creation, and general analysis.

What teams should do.

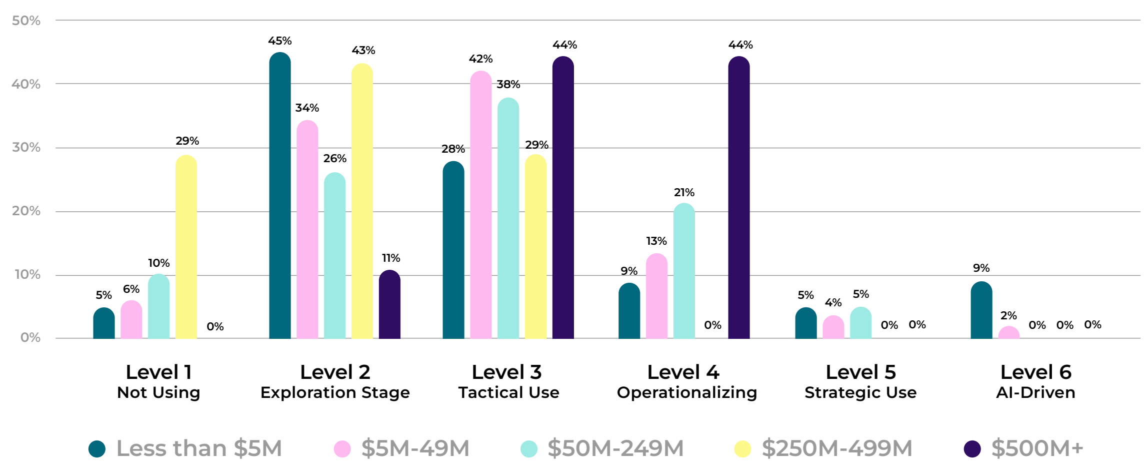
- **Define an AI maturity path** to get you from tactical to strategic. AI can lift retention when it's wired into clean data and owned workflows.
- **Build the foundation:** establish data contracts, PII governance, and evaluation harnesses; make the CSP the system of execution.
- **Enable and train humans:** test and develop playbooks, prompts, QA checklists, and verification processes so the team can use AI for good.

AI's frozen middle, and the startup surprise.

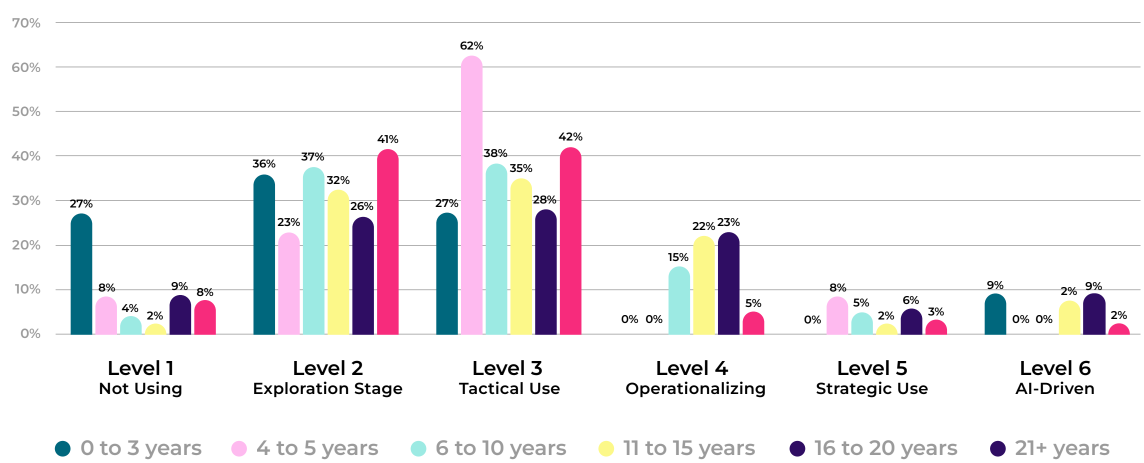
Despite the hype, adoption isn't universal. 27% of companies aged 0–3 years report no AI use, and an even larger 29% of companies at $250M–$499M in revenue say the same. Early-stage teams often lack stable data and processes; larger organizations can face complexity without enterprise-level resourcing, leaving pilots stranded in proofs-of-concept.

Age and size don't predict AI maturity; operational readiness does. Treat it like core ops, not a side experiment, and integrate it with clean data from integrated systems like your CSP to create more strategic applications.

AI maturity by annual revenue (trending reliability)



AI maturity by years in business (statistically reliable)



GOALS AND METRICS

Insight: Zero in on revenue.

Across the customer lifecycle, leaders are prioritizing work that converts directly to revenue. Together, these choices show a consistent through-line: shorten time to value, deepen use, prevent risk early, mobilize advocates, and scale the motion with automation, with each step mapping to retention and expansion.

Measure the journey that makes the money.

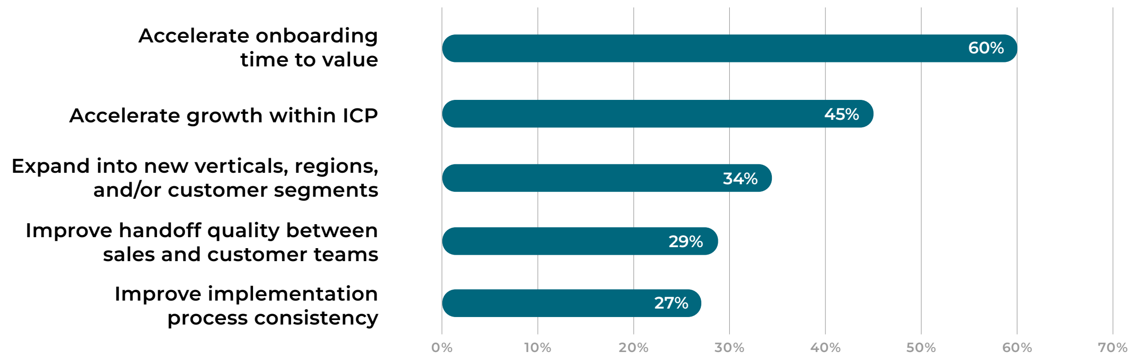
We asked leaders what their top two goals were in each of the following categories.

- **Acquisition & Onboarding:** top goals are time-to-value (60%) and growth within ICP (45%), reflecting a focus on speed and fit.
- **Adoption & Expansion:** top goals are expansion opportunities (67%) and deeper adoption (62%).
- **Relationship & Retention:** top goals are early risk detection (62%) and lifecycle management at scale (39%).
- **Advocacy and Community:** the goal of increasing customer participation in advocacy programs (74%) leads decisively.
- **Customer Insights:** top goals are health/engagement visibility (54%) and data-driven decisions (48%).
- **Scale & Automation:** AI/workflow efficiency (83%) dominates.
- **Strategy & Operations:** top goals are tying customer team work to GRR and NRR (41%) and optimizing CSM capacity (29%).

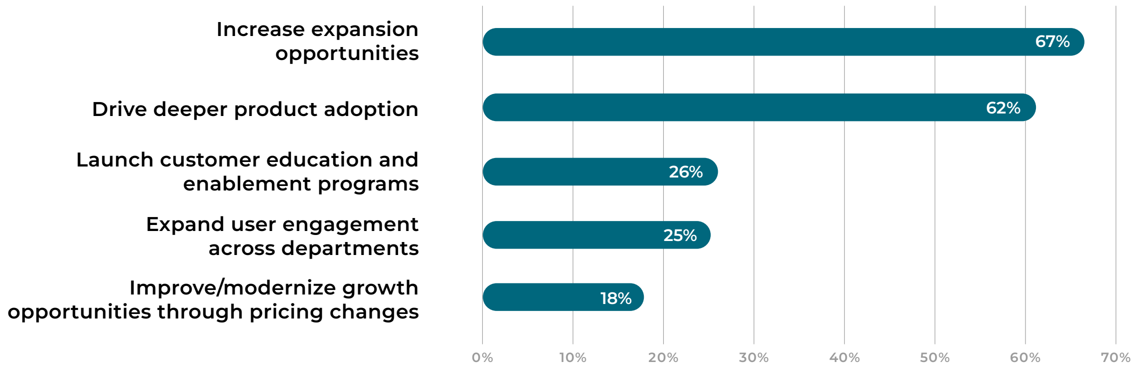
The same revenue focus appears in measurement. Teams rank NRR (51%), churn rate (48%), and GRR (40%) as the top success metrics because they're the clearest expressions of base economics.

GRR shows what you protect, churn exposes leakage, and NRR confirms whether the base grows after expansions and downgrades. Churn rate, which rose from #3 in 2023 to #1 in 2024, dropped this year to #2, supporting the story of a more stable economic environment.

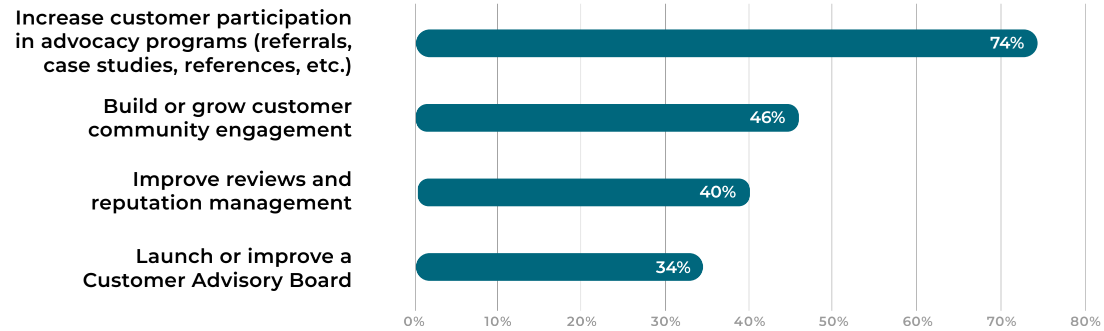
Please check the top two ACQUISITION and ONBOARDING priorities of your customer go-to-market team?



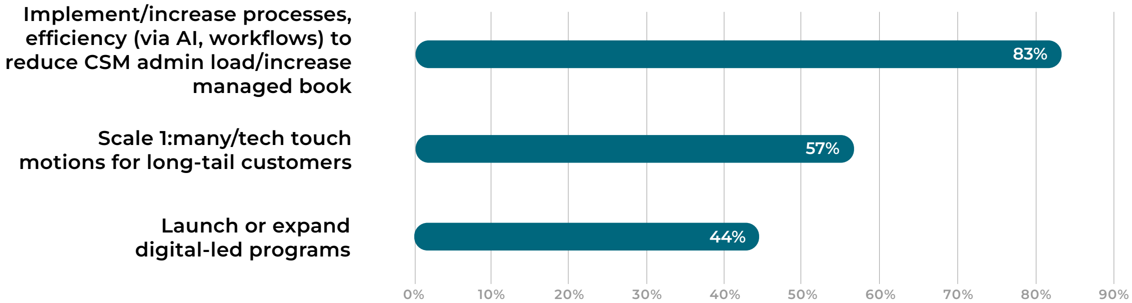
Please check the top two ADOPTION and EXPANSION priorities of your customer go-to-market team.



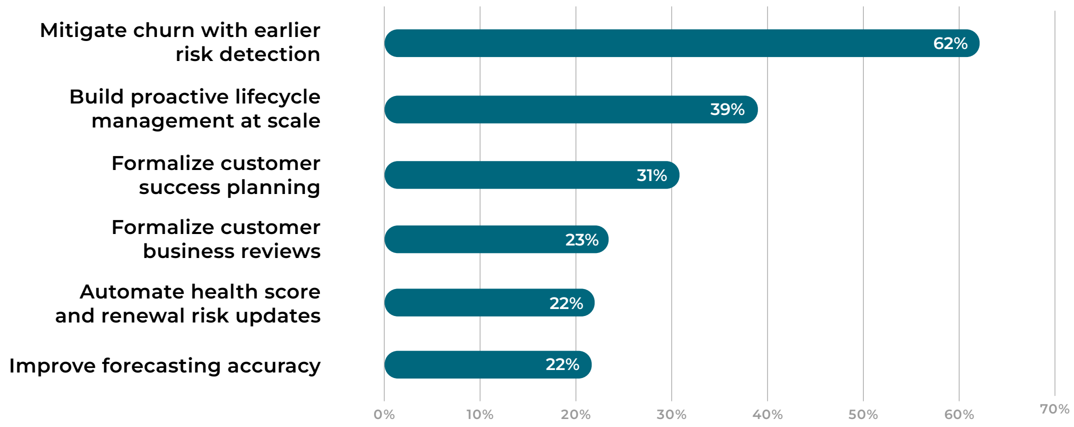
Please check the top two ADVOCACY and COMMUNITY priorities of your customer go-to-market team.



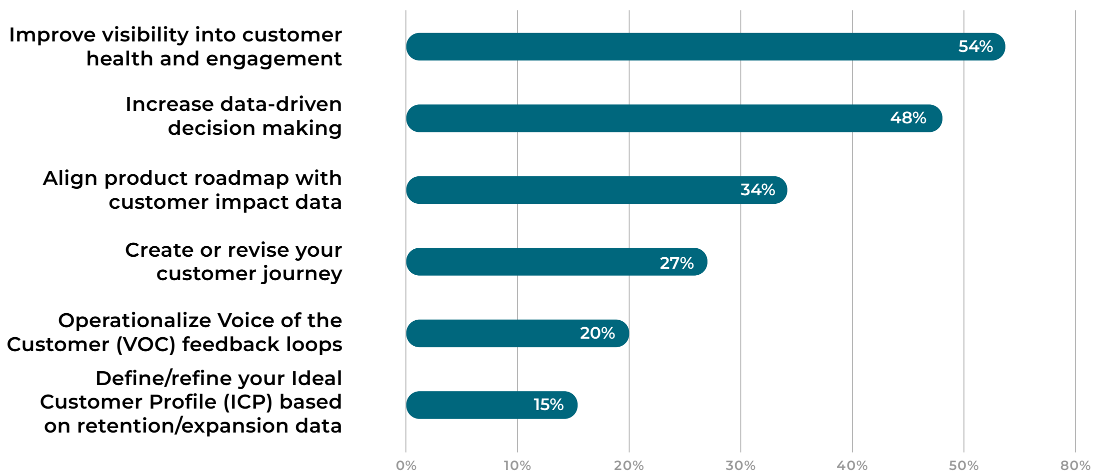
Please check the top two SCALING and AUTOMATION priorities of your customer go-to-market team.



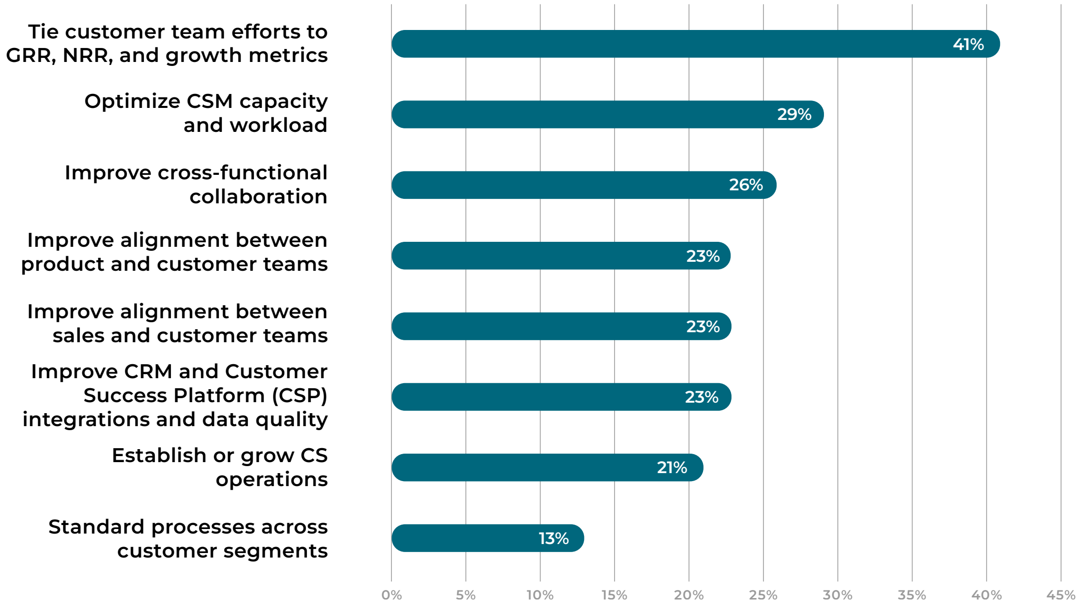
Please check the top two RELATIONSHIP and RETENTION priorities of your customer go-to-market team.



Please check the top two CUSTOMER INSIGHTS priorities of your customer go-to-market team.



Please check the top two STRATEGY and OPERATIONS priorities of your customer go-to-market team.



Historical look at the top three metrics 2022–2025

2022	2023	2024	2025
1. Net Revenue Retention	1. Net Revenue Retention	1. Churn Rate	1. Net Revenue Retention
2. Gross Revenue Retention	2. Churn Rate	2. Net Revenue Retention	2. Churn Rate
3. Churn Rate	3. Expansion Revenue	3. Gross Revenue eetention	3. Gross Revenue Retention

What do leaders wish they could do better? Scaled AI, better data, revenue-tied CS.

We asked an open-ended question: what do you wish you were doing better right now? Our respondents' answers painted a clear picture: leaders want a modern post-sale motion—powered by AI, grounded in clean data, and operationalized through disciplined processes—that reliably lifts NRR/GRR and turns customer insight into expansion. The top five themes that emerged:

- **Scale with AI and automation.** Stand up predictive health and churn/risk scoring, journey mapping, and workflow automation; expand tech-touch/one-to-many programs so CSMs can focus on high-value moments.
- **Fix the data foundation.** Clean data, unify CRM/CSP/support data, accelerate data integrations, and build a reliable, 360° view so insights are timely and trustworthy.
- **Turn data into revenue.** Use product and engagement analysis to trigger outreach, prove ROI, surface expansion triggers, and standardize success plans.
- **Tighten operating discipline.** Improve sales-to-CS handoffs, document playbooks, invest in CS operations, and standardize processes to improve forecasting, capacity, and consistency.
- **Align teams and processes.** Strengthen cross-functional collaboration, equip sales with expansion enablement, rebalance CSM ratios, and rationalize the stack (while securing budget for purpose-built platforms).

RECOMMENDATIONS

What customer revenue leaders should prioritize going forward.

In 2025 and beyond, growth is customer-led. To win, you need to build the engine that turns every customer interaction into value: aligning around lifecycle revenue metrics, staffing the roles that move the needle, and making data your competitive advantage.

Our analysis suggests five strategic best practices for customer revenue leaders going forward.

1. Treat 2025 as a baseline year and re-engineer your operations.

Retention has stabilized. Your success now hinges on controllable execution, not market volatility. It's time to refine your onboarding, adoption, and renewal playbooks. Expand enablement coverage and tighten handoffs and deliver long-term success.

2. Staff to win.

The presence of enablement, CSMs, support, and account management correlates with higher NRR. Make sure you have these on your team and support them with operations, technology, education/training and role clarity.

3. Build a customer-data-centric stack with your CSP as the hub.

Stronger tech stacks correlate with stronger NRR. Unify product, CRM, support, LMS, billing, and survey data in your CSP for more complete data. Tie technologies to specific goals: CRM for pipeline accuracy, CSP for renewals and health, LMS for activation.

4. Move AI from tactical productivity to revenue impact, with clean data.

Most customer teams are stuck in exploration or tactical AI use. Revenue-driving automation is early and represents a competitive advantage.

Define an AI maturity path, establish data processes and governance, and enable teams.

5. Measure on lifecycle revenue metrics.

Leaders win on revenue and retention, so focus efforts on improving time-to-value, adoption, early risk detection, expansion, retention, and advocacy.

> *At Pavilion, we see firsthand that customer-driven growth requires cross-functional alignment. Our community of thousands of GTM leaders—from sales to success, marketing to product—confirms what this study underscores: the companies winning today are those that treat post-sale execution as a growth engine, not a support function. The data shows that success isn't about any single role, tool, or tactic, but about how leaders orchestrate teams, technology, and customer outcomes together. Pavilion exists to help leaders make those connections—because in this new era, revenue resilience and expansion are collective achievements."*
>
> – **Sam Jacobs, CEO, Pavilion**

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