

SuccessByCS

THE POST-SALES RESET

# Find what is stalling customers **after** **the sale.**

A focused review for founder-led B2B SaaS businesses. Short interviews, my analysis, and a clear report on what to fix first.

US\$500 • BILLED IN YOUR CURRENCY • CHRIS SPARSHOTT



SOUND FAMILIAR?

# The work after the sale often has no clear owner, so the founder becomes the fallback process.

|                                                                                                                                                    |                                                                                                                                          |                                                                                                                                                        |                                                                                                                                                   |
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| <div>01</div> <div>Customers are slow to reach value</div> <div>Deals close, then onboarding drags and the first real result takes too long.</div> | <div>02</div> <div>You are still on the escalation path</div> <div>Support questions and customer issues keep landing back on you.</div> | <div>03</div> <div>What worked informally is breaking</div> <div>More customers or more complex implementations have made the work inconsistent.</div> | <div>04</div> <div>Renewal risk shows up too late</div> <div>Health, ownership and renewal risk only become visible when it is hard to act.</div> |
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That can work for a while. It does not create a repeatable customer operation.

REAL CUSTOMER PROGRESS

**\$200M**  
MANAGED BOOK OF BUSINESS

**+25%**  
DIGITAL CSM ACTIVATION

**60 → 80%**  
LARGE DEAL ACTIVATION IN 90 DAYS

“From the start, Chris took the time to properly understand our business and culture... He’s successfully onboarded six new team members and coached the team to consistent, month-on-month results against ambitious activation targets.”

Charlie Marsh • managed Chris at Tradify • LinkedIn recommendation

Trusted by founders and teams at Tradify • SearchPilot • ScaleWise

START HERE

# The Post-Sales Reset

I look at how your customers move from signed deal to renewal, find where the work is stalling, and give you a short, practical report on what to fix first.

You leave with a clear view of the next steps, whether or not we work together afterwards.

# \$500

FIXED FEE • BILLED IN YOUR  
CURRENCY

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**Interviews:** up to 2 hours, 1 to 3 people

**Analysis:** 1 to 2 hours, by me

**Read-back:** 30 minutes

**Payment:** upfront, once dates are agreed

HOW IT WORKS

# Short interviews. One clear report.

|                                                                                                                                                                                                                 |                                                                                                                                                                                                                          |                                                                                                                                                                                                                                      |                                                                                                                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div>01</div> <div>Interviews</div> <div>I interview the founder, the person closest to customer success and, if useful, your support leader. Separately, 30 to 60 minutes each.</div> <div>Up to 2 hours</div> | <div>02</div> <div>Issues and journey</div> <div>We walk through recent customer issues and your customer journey, to see where problems cluster: activation, retention or elsewhere.</div> <div>In the interviews</div> | <div>03</div> <div>Map, assess, plan</div> <div>I map the issues onto the Sideways Funnel with your ways-of-working documents and CRM stages, assess AI agent readiness and write the plan.</div> <div>My analysis · 1-2 hours</div> | <div>04</div> <div>Read-back</div> <div>I walk you through the report. We agree the priorities and first actions, and whether you run the plan yourselves.</div> <div>30 minutes</div> |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

All on Google Meet, at times that suit your team and time zone. Nobody loses a whole day.

## BEFORE THE INTERVIEWS

# Your pre-interview pack

Material you already have. It usually takes 15 to 20 minutes to gather.

### **01** Customer examples

Two or three recent customers: one that went well, and one or two that stalled, escalated or churned.

### **02** Ways of working

What you already use for handover, onboarding, escalation or renewals: checklists, playbooks, templates.

### **03** CRM stages

If you use a CRM such as HubSpot, a screenshot or export of your deal and customer lifecycle stages.

### **04** Who is involved

A simple list of the people and systems that touch a customer after the sale.

### **05** Support themes

If your support leader takes part: the most common reasons customers ask for help, and what escalates.

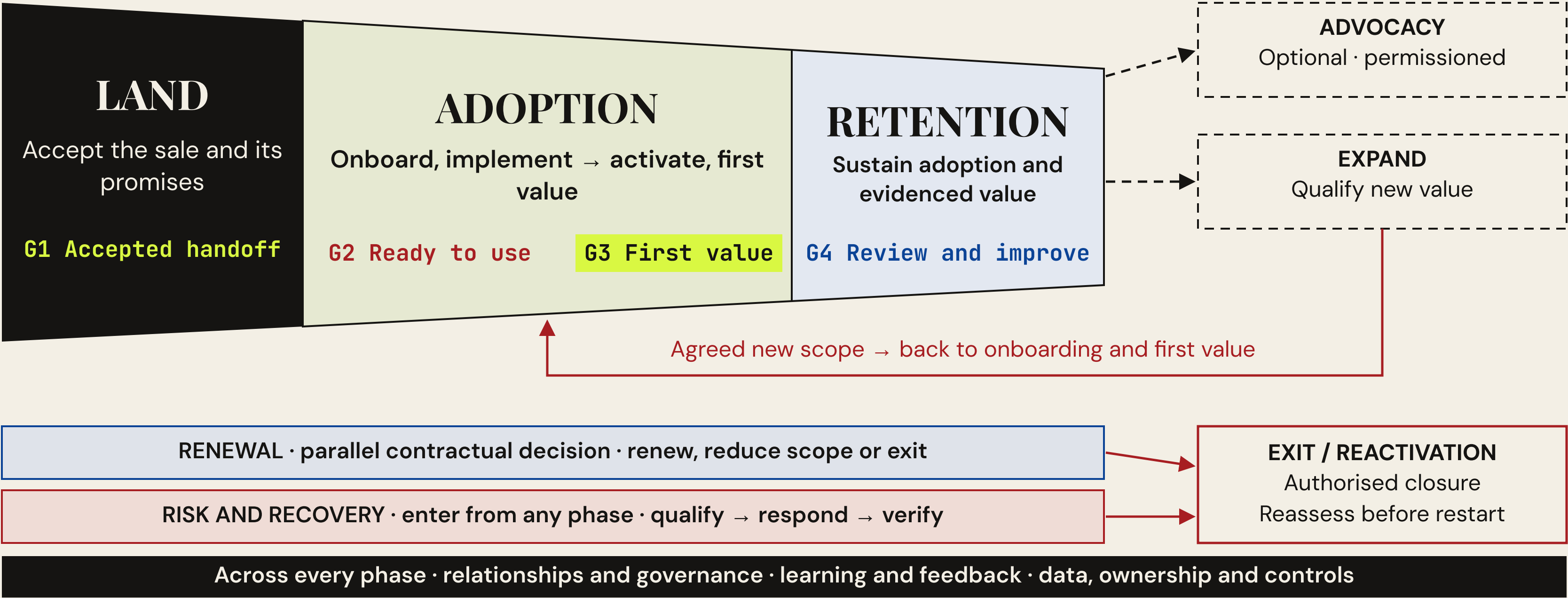
### **06** Your measures

Time to first value, activation, renewal rate or support volume. Unknown is a fine answer.

Screenshots, exports and redacted examples are fine • no production-system access needed

THE METHOD

# The Sideways Funnel™ operating model



## EVIDENCE GATES

# A customer moves on when there is proof of progress, not just activity.

**G1**

### Accepted handoff

Delivery has accepted the sale: the promises made, the customer's context and the first next step.

**G2**

### Ready to use

The customer is set up, implemented and able to start using the product.

**G3**

### First value

The customer has reached a first meaningful result that proves the purchase was worthwhile.

**G4**

### Review and improve

Value is reviewed with the customer on evidence, and the next improvements are agreed.

WHERE IT STARTED

# The original Sideways Funnel exercise

I first published the Sideways Funnel as a Miro template in 2021, so teams could map their own customer success lifecycle in about 90 minutes.

|               |               |              |
|---------------|---------------|--------------|
| 8.9K<br>VIEWS | 1.1K<br>USERS | 172<br>LIKES |
|---------------|---------------|--------------|

Miroverse, October 2026. In the Reset, I do this mapping for you, from your interviews and documents.

|    |                                                                              |        |
|----|------------------------------------------------------------------------------|--------|
| 01 | Read the instructions and get familiar with the template                     | 15 min |
| 02 | Define your lifecycle phases                                                 | 15 min |
| 03 | Define the functional teams involved in each phase                           | 15 min |
| 04 | Define the actions in each phase by role: Associate CSM, CSM and CS Director | 20 min |
| 05 | Define the metrics for each phase that contribute to a successful outcome    | 20 min |
| 06 | Reflect, and review your work in a day or two                                | Later  |

## WHAT YOU GET

# A written report, not a slide deck.

### **01** Sideways Funnel map

Where your customer issues sit across Land, Adoption and Retention, and which evidence gates are being missed.

### **02** Priority issues

The one or two problems causing the most customer or operational pain, such as activation or retention, with the evidence behind them.

### **03** AI agent assessment

Which affected workflows an AI agent could assist now, which need foundations first, and where a person should stay in charge.

### **04** 30 to 90 day priority plan

Sequenced next actions and measures for the next 30 to 90 days, plus the open questions still to answer.

Not included: defining roles and responsibilities, implementation, integrations or a full data audit. These are scoped separately.

## AI AGENT ASSESSMENT

# AI readiness, without the hype.

Not every repetitive task is ready to automate. I sort each affected workflow into one of three groups.

### **Assist now**

A bounded task with known inputs, safe actions and a human approval point.

### **Prepare first**

The workflow needs clearer data, completion evidence or an escalation rule before anything is automated.

### **Keep human-led**

Trust, negotiation, judgement or sensitive customer conversations matter most.

WHAT CAN HAPPEN NEXT

# The Reset stands on its own.

The default next step is for your team to run the plan. If you want help, the report makes the next piece of work specific enough to decide on.

|    |                       |                                                                                            |
|----|-----------------------|--------------------------------------------------------------------------------------------|
| 01 | Workflow sprint       | Design one priority workflow, such as handover, onboarding, risk or renewal planning.      |
| 02 | Foundations sprint    | Build the minimum operating model: customer journey, roles, risk and renewal rhythm.       |
| 03 | Fractional Head of CS | I put the agreed priorities into practice and keep the operating rhythm going as you grow. |

Optional and separately scoped. No obligation to buy further work.



WHO RUNS IT

# Chris Sparshott

FRACTIONAL HEAD OF CUSTOMER SUCCESS • SUCCESSBYCS

As APAC Head of Renewals at IBM Asia Pacific, I managed a \$200M book of business. I was also Fractional Head of APAC Customer Success at Tradify, where I onboarded and coached the team to consistent month-on-month activation results.

I created the Sideways Funnel™ and I run every Reset personally. Based in New Zealand, working with teams in Australia, Singapore, the UK, Canada and the US.

BOOK YOUR RESET

# Start with a short call.

Tell me where customer work is getting stuck. We will both know quickly whether the Reset is the right next step.

[postsales.successbycs.com](https://postsales.successbycs.com)

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- 01 Book a short fit call
  - 02 I confirm interview dates and send a payment link
  - 03 Paying US\$500 holds your dates
  - 04 Send your pre-interview pack
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Prefer email? [chris@successbycs.com](mailto:chris@successbycs.com)