

Transitioning from Sales to Customer Success

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If you're thinking of transitioning from a career in sales to customer success, you're not alone. While sales roles can be extremely fulfilling (and lucrative), they're not without their challenges. Sales can be a stressful environment, particularly as you strive towards [higher win rates](#).

Additionally, the sales landscape doesn't mesh with everyone. Some people find they get more fulfillment out of a job that allows them to focus on building relationships.

Just like sales, a career in customer success can be very promising, with plenty of opportunities for growth. What's more, as companies take a more customer-centric approach to sales, focusing on account management and retention, demand for customer success managers is increasing. Between 2021 and 2022, open positions [increased by around 34%](#).

The question is, how do you transition from sales to customer success?

The Difference Between Sales and Customer Success

There are some similarities between sales and customer success roles. Both sales teams and customer success managers work in 'customer-facing' roles. They both need to build relationships with customers, and both rely heavily on [emotional intelligence](#) and soft skills.

However, for the most part, this is where the similarities end. Sales is focused on converting prospects into customers, upselling, and increasing revenue. Customer success, on the other hand, focuses on improving customer experience, and retaining existing clients.

The responsibilities of customer success teams are often referred to as 'post sales' activities. After a sales team lands new customers for the business, customer success specialists and managers step in to ensure they get the most from their chosen solution.

Customer success managers handle everything from onboarding customers, to proactively taking steps to learn about and address any issues they might have. While they may be savvy at spotting opportunities for up-sells and cross-sells, their attention isn't solely on revenue.

How to Transition from Sales to Customer Success

Although sales and customer success roles are very different, the transition from one world to another isn't always as complex as it appears. The skills you've already developed in the sales world will help you to move into your new role. However, you will need to cultivate some extra skills too.

Here are some of the key steps involved in transitioning from sales to a customer success role.

Step 1: Know Your Why

A career change isn't something you should move into lightly. Even if a new career will be more beneficial for you in the long run, it can cause major disruption in your life. To ensure you're taking the right steps towards your 'ideal future', you need to know the why behind your decision.

There are plenty of reasons why you might consider moving into a customer success role. You might find you're better suited to building relationships with customers and preserving loyalty than you are at [prospecting on a variety of different channels](#).

You may even want to temporarily explore a role in customer success to improve your range and abilities as a sales professional. Working in one of these roles will help you to get a better insight into the mind, pain points, and goals of your buyers.

There's no one-size-fits-all reason to move from sales to customer success. Whatever 'why' you identify, however, will need to be enough to keep you motivated throughout the journey.

Step 2: Consider your Transition Options

Once you've established why you want to move into a customer success role, the next step is figuring out where the next step in your career path is going to take place. Primarily, you'll have two options.

The first is to speak to your manager or executive team about changing roles in your existing company. If you're already familiar with the sales process and the product at your business, then moving into a role as a customer success manager or something similar should be quite straightforward. However, you'll need to explain to your manager why you want to make the move.

It might be helpful to take some time to collect information or 'evidence' that shows you would be valuable in a customer success role. Highlight how effectively you've been able to build relationships with customers and improve retention in the past.

The other option is to consider moving to a role in a different company. This process can be a little more difficult, as you'll need to get to know new processes, teams, and products. However, it could give you the opportunity to develop your network and build new skills.

Step 3: Consider Which Transferrable Skills You Have

As mentioned above, while the roles of sales and customer success professionals are quite different, they do demand a lot of [the same skills](#). Knowing which 'transferable' skills you already have will make it easier to highlight these in your resume, and when speaking to employers.

Some of the most valuable sales skills you can bring to customer success include:

- **Active listening:** Just like salespeople, customer success managers need to be able to actively listen to their customers, and ask questions to glean insights, discover pain points, and address issues. Good active listening skills will also help you build stronger relationships.
- **Curiosity:** Great salespeople know it's important to remain curious. They know how to ask the right questions at the right time to find out how they can better serve their prospects. The same skills are necessary in customer success roles.
- **Resilience:** While you won't hear as many 'no's' in customer success as you will in sales, maintaining a positive attitude is crucial. CSMs can still face objections and push-back, so it's important to ensure you can stay resilient when dealing with challenges.
- **Empathy:** Emotional intelligence and empathy are important in both sales and customer success. You need to be able to understand your customer's pain points and concerns, and connect with them on an emotional level to nurture relationships.
- **Problem solving:** Just as sales professionals need to overcome complex situations, customer success professionals need to be able to recognize problems, and explore creative solutions. You need to be an expert at addressing issues for your clients, and managing conflict.
- **Setting expectations:** Setting the right expectations is essential to both customer success and sales roles. It's often the first step to gaining a customer's trust. Setting expectations means being able to answer tough questions, and communicate transparently with clients.

Step 4: Determine Which New Skills You'll Need to Develop

Although you may have many of the skills you need to thrive in a customer success role already, the chances are you'll need to develop some additional abilities too. For instance, in a customer success role, you may be responsible for using new [software and technology](#) to interact with customers, follow up on issues, and maintain loyalty.

You may need to learn more about relationship management, and customer journey mapping, so you can develop stronger connections with the clients you serve. Additionally, you may need to refine some of your existing skills in time management and organization to ensure you can handle a variety of accounts and clients simultaneously.

One of the most important 'transitions' you'll need to deal with is a change in mindset. As a salesperson, your focus is almost entirely on meeting your quota. While you'll have expectations to adhere to in a customer success role, the focus is less on revenue, and more on retention. You'll need to focus on becoming a valuable asset to clients, rather than pushing sales.

Step 5: Commit to Constant Learning

Finally, once you move into a customer success role, don't make the mistake of thinking all of the hard work is done. Just like in sales, your role in customer success will constantly evolve and change, based on the trends and patterns in the wider landscape.

You'll need to be committed to constantly developing your knowledge, through training, coaching, and mentorship opportunities. This will help you to not only excel in your initial role, but also unlock opportunities for higher-paid roles with more responsibilities.

Read books related to customer success, take online courses, earn certifications, and network with other specialists in your industry. At the same time, don't be afraid to request regular feedback from your manager and team members, for insights into where you can improve.

Making the Transition from Sales to Customer Success

Moving from sales to customer success can be an incredible opportunity. It's a great way to refocus your career in a growing industry, where demand for expertise is higher than ever. The skills you've developed as a sales professional so far should be extremely useful to your customer success role. However, it's important to remember the transition can be challenging.

There will be new processes to learn, new terminology, and even a new mindset to adapt to. The good news is that with a little focus and the right strategy, the journey can be simpler than you'd think.

Learn how to develop your hard and soft skills in the world of sales and customer success, and collect insights from the experts, on the [Hard Skill Exchange](#).

HSE Team