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Professional development in Customer Success through a community

A case study of Customer Success Nordics

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Master's thesis

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Customer Success is a relatively new field in business that has begun to gain recognition as one of the organization's key departments. It is a highly influential strategic discipline critical for customer retention and sustainable revenue growth, particularly within SaaS organizations. Despite its increasing strategic importance, academic research on the Customer Success segment has remained quite limited, and the field still lacks formal academic programs to support the professional development of individuals working in the field. In response to this gap of knowledge, professionals in this field have spontaneously begun to form nonfirm epistemic communities, dedicated to co-creating knowledge, sharing industry insights, exchanging best practices, and providing mutual support for ongoing professional development. This research addresses a gap in academic research by identifying how these specialized communities support the professional development of individuals within this evolving field.

The research utilized a qualitative approach, employing an intensive case study methodology focused on a community called Customer Success Nordics, the only official Customer Success community in Helsinki, Finland, which emerged nearly a decade ago from the initiative of another global network. The central research objective was to identify how Customer Success communities support the professional development of Customer Success professionals, and it was explored through two research questions: what needs Customer Success professionals have regarding their professional development, and how they pursue it; and how professionals perceive the role of a Customer Success community in their professional development. The empirical data was gathered through eight individual semi-structured interviews with community members, and resulting data was later analysed using thematic analysis.

The main results indicate that Customer Success professionals view ongoing development as critical for career stability and for remaining relevant in a field characterized by rapid change. Professionals emphasize the need to be multiskilled, prioritizing soft skills, organizational abilities, and industry expertise, and primarily address these needs through informal learning, which serves as the dominating method for professional development in this field. Developmental needs are continuously influenced by emerging trends, particularly the integration of Artificial Intelligence to enhance operational efficiency and scale processes. The Customer Success community offers substantial and multifaceted benefits for professional development: members leverage the network for gaining job-specific knowledge, benchmarking against peers and accessing exclusive, real-world examples that are not available through formal channels. Participation provides essential peer support to mitigate the occasionally isolated nature of the role and empowers job seekers in career development through mentorship and recruitment guidance. Furthermore, active engagement fosters enhanced professional confidence and a collective sense of identity, effectively validating Customer Success as a legitimate and established profession and helping members navigate its varied organizational definitions.

Overall, this study reveals that a Customer Success community offers its members invaluable resources, proving highly effective for professional development. The findings contribute to the academic understanding of the relatively underexplored field of Customer Success, particularly from the perspective of professional development and communities.

Keywords: Customer Success, professional development, community

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Customer Success on suhteellisen tuore liiketoiminnan alue, joka on alkanut vakiinnuttaa asemansa yritysten keskeisten osastojen joukossa. Se on strategisesti merkittävä osa-alue, jolla on tärkeä vaikutus asiakassuhteiden ylläpidossa sekä kestäväen liiketoiminnan kasvun varmistamisessa, erityisesti SaaS-yrityksissä. Vaikka Customer Success -roolien strateginen merkitys tunnustetaan tänä päivänä yhä laajemmin, akateeminen tutkimus alasta on silti toistaiseksi melko vähäistä. Lisäksi alalta puuttuvat vielä akateemiset koulutusohjelmat, jotka voisivat tukea tässä kentässä työskentelevien ammatillista kehittymistä. Tämän tiedon puutteen vuoksi alalla toimivat ammattilaiset ovat omaehtoisesti alkaneet perustaa epävirallisia yhteisöjä, jotka keskittyvät tiedon ja toimivien Customer Success -käytäntöjen jakamiseen, sekä vertaistuen antamiseen ammatillisen kehityksen edistämiseksi. Tämä tutkimus tuo esille, miten nämä yhteisöt tukevat yksilöiden ammatillista kasvua tällä edelleen kehittyvällä Customer Success -kentällä.

Tutkimus toteutettiin laadullisena tapaustutkimuksena, ja siinä keskityttiin Customer Success Nordics -yhteisöön, joka edustaa toistaiseksi ainoaa virallista Customer Success -yhteisöä Helsingissä. Kyseinen yhteisö sai alkunsa miltei vuosikymmen sitten osana toista, maailmanlaajuista verkostoa. Tutkimuksen tavoitteena oli selvittää, miten Customer Success -yhteisöt tukevat alan ammattilaisten ammatillista kehittymistä. Tavoitetta lähestyttiin kahdella tutkimuskysymyksellä: mitä ovat Customer Success -ammattilaisten ammatillisen kehityksen tarpeet ja kuinka he pyrkivät kehittämään itseään; sekä millaisena ammattilaiset kokevat yhteisön roolin heidän ammatillisessa kehityksessään. Aineisto kerättiin kahdeksan yhteisön jäsenen puolistrukturoitujen haastattelujen avulla ja aineisto analysoitiin teema-analyysiä käyttäen.

Tulosten valossa jatkuva ammatillinen kehittyminen on Customer Success -ammattissa välttämätöntä, sillä toimintaympäristö elää koko ajan ja osaamisen on pysyttävä ajan tasalla. Ammattilaiset näkevät moniosaamisen keskeisenä menestystekijänä; tärkeitä ovat erityisesti vuorovaikutus- ja yhteistyötaidot, organisointikyvyt sekä asiakkaiden toimialojen tuntemus. Näihin tarpeisiin haetaan ratkaisuja ensisijaisesti erilaisin informaalin oppimisen keinoin, joka onkin alan vallitseva ammatillisen kehittymisen muoto. Kehittämistarpeita muovaavat jatkuvasti uudet ilmiöt, erityisesti tekoälyn kytkeminen toimintaan operatiivisen tehokkuuden parantamiseksi ja prosessien skaalaamiseksi. Customer Success -yhteisö puolestaan tukee ammatillista kehittymistä monipuolisesti ja merkittävästi: jäsenet hyödyntävät yhteisöä ammattitaidon syventämiseen ja benchmarkingiin, sekä ammentavat oppia muiden jäsenten tarjoamista käytännön esimerkeistä. Yhteisö tarjoaa myös vertaistukea, joka lievittää roolin ajoittaista yksinäisyyttä, sekä tukee jäseniä heidän urakehityksessään mm. mentoroinnin ja rekrytointisparrauksen kautta. Aktiivinen osallistuminen vahvistaa jäsenten ammatillista itseluottamusta sekä yhteistä identiteettiä, mikä osaltaan vahvistaa myös Customer Success -roolien asemaa vakiintuneena ammattina, ja auttaa jäseniä ratkaisemaan yhdessä alan ja roolien moninaisuuden tuomia haasteita.

Tutkimus osoittaa, että Customer Success -aiheeseen keskittynyt yhteisö tarjoaa jäsenilleen korvaamattomia resursseja, jotka ovat tehokkaita ammatillisen kehityksen kannalta. Löydökset edistävät akateemista ymmärrystä Customer Success -alasta, jota on toistaiseksi vielä suhteellisen vähän tutkittu erityisesti ammatillisen kehittymisen ja yhteisön vaikutusten näkökulmasta.

Avainsanat: Customer Success, ammatillinen kehittyminen, yhteisö

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1 Introduction

1.1 Background

The position of a Customer Success Manager is a relatively recent addition to the business landscape, yet it has quickly become a highly influential role due to its critical impact on business outcomes, such as retention and revenue growth. Although Customer Success as a department was initially centred on addressing customer churn, the function has over time evolved to focus more on maximising customer value. Customer Success has become a fundamental part of an organization's success, particularly within SaaS organisations offering complex solutions (Adams, 2019; Eggert et al., 2020; Madruga et al., 2023). Especially for subscription-based and solution-oriented companies that seek sustainable revenue growth and long-term profitability, this role has become a key driver for growth. On some occasions, Customer Success has even emerged as a source of competitive advantage (Eggert et al., 2020; Mehta et al., 2016; Vaidyanathan and Rabago, 2020). The notable growth of the field is evident in the rise in individuals holding the Customer Success Manager title; there were fewer than 5000 in 2015, but by 2018, the number had increased to 30 000. This increase led LinkedIn to rank Customer Success Manager as the sixth most promising job in 2019 (Adams, 2019; Hilton et al., 2020). LinkedIn data also showed that Customer Success Managers have the highest career advancement score – highlighting the potential of the profession regarding career advancement. This is reflected in the career paths of many Customer Success professionals, with projections indicating that future Chief Customer Officers (CCO) may often have backgrounds in Customer Success. The role has also experienced notable salary growth; in 2020, 60% of Customer Success professionals reported receiving a base salary increase within the previous year (Vaidyanathan and Rabago, 2020). Additionally, some managers have observed strong competition for qualified Customer Success Managers, noting instances where their employees had received job offers from other companies with a 40-50% salary increase (Madruga et al., 2023).

Despite the role's increasing significance and evolving responsibilities, the field still lacks well-established frameworks to support both the practice and professional development of Customer Success professionals (Eggert et al., 2020; Madruga et al., 2023). Currently, no formal academic programmes dedicated to Customer Success are available, and there is no standardized approach to its implementation, posing challenges for those aiming to teach or standardize the discipline (Vaidyanathan and Rabago, 2020). Professionals in this field must proactively seek opportunities for knowledge development and skill advancement to continue developing in their careers.

As a response to the gaps of knowledge in Customer Success, professionals in this field have been coming together, forming nonfirm epistemic communities to co-create this knowledge on their own. These communities are networks of professionals, dedicated to sharing insights, understanding best practices in Customer Success, exchanging advice, and providing mutual support on Customer Success topics. The communities serve as advanced mechanisms for knowledge transfer, contributing to the development of more mature Customer Success management operations. Members have also noted that participation in such communities enables them to remain informed of emerging trends in Customer Success and mitigate uncertainty by providing access to peers' experiences with various implementations, for instance with technological solutions. These communities also play an essential role in fostering a positive culture around Customer Success as a profession, offering a forum for an in-depth discussion and valuable external perspectives on opportunities and solutions to shared challenges (Madruga et al., 2023). Collectively, these findings suggest that Customer Success communities may offer substantial value for the continuous professional development of professionals in the field.

1.2 Insider perspective

Since the inception of the profession, these nonfirm epistemic communities have developed globally as well as locally (Madruga et al., 2023). In 2023, I encountered one local version of these communities, when I learned about a Customer Success community in Helsinki (now called Customer Success Nordics) through LinkedIn. Seeing their announcement of an upcoming afterwork event at a local company's office, I decided to attend out of curiosity. At the gathering, I was extremely impressed by the presence of dedicated professionals, who shared my passion for Customer Success. Surrounded by a group of like-minded professionals, eager to exchange insights on the day's topic, I found the experience truly meaningful. My career in this field began nearly a decade ago, and particularly early on, I had found it challenging to identify standard practices to Customer Success due to limited access to knowledge and lack of peer exchange. At the beginning of my career, I worked for a startup where I was not only the sole employee with a Customer Success title, but I also had no personal connections with others holding the same title in any other companies either. When I searched for any Customer Success material online, I was left with confusion; to me, the discipline seemed more like a buzzword than an established business methodology. I didn't truly understand what it was about, which made it challenging to apply any effective Customer Success practices in my role back then.

When years later I finally engaged with this community, I realized the value of collective learning and responsive collaboration, which I had been unconsciously longing for. Although by then I had developed a solid understanding of the field on my own through years of experience and independent study, the opportunity to discuss and evaluate various implementation strategies with others proved quickly to be invaluable; it elevated my professional development beyond what I could have achieved alone. I strongly believe Customer Success relies heavily on practical experience: testing new approaches, iterating, and learning continuously. There is no one way to implement it, nor can any approach be guaranteed to remain effective indefinitely. But what I am grateful for is that this community has provided a platform for collaborative learning, sharing best practices, and accessing peer support throughout the ongoing evolution of the Customer Success landscape, which I found unique against all the other resources I had tried by myself before encountering this community.

Due to my active participation in the case organization's (Customer Success Nordics) activities since 2023, this research was conducted partially from an insider perspective. Although I have not served as a volunteer within the community – and therefore would not consider myself as a complete insider – still, my familiarity with the core activities and my personal experiences naturally had formed certain assumptions already prior to the research regarding the professional development opportunities offered by the community. In fact, the insider perspective was central to the study's existence, as the topic stemmed from my own curiosity and questions I had been pondering on my own: how do other members gain support from this community or similar Customer Success communities for their professional development? Are their approaches and gains comparable to mine, or do they engage with the community in fundamentally different ways and for distinct purposes, leading to different results and outcomes? The research questions naturally later developed into a more sophisticated format, but the core idea remained the same.

1.3 Research purpose and research questions

The purpose and main objective of this research was to identify how Customer Success communities support the professional development of Customer Success professionals. According to Adams (2019), the Customer Success field remains in a state of development, and the profession continues to evolve, with its maturity and practices often shaped by an organization's resources and overall approach to Customer Success. As the profession changes, questions arise about how professionals develop their expertise and the part that communities play in this process.

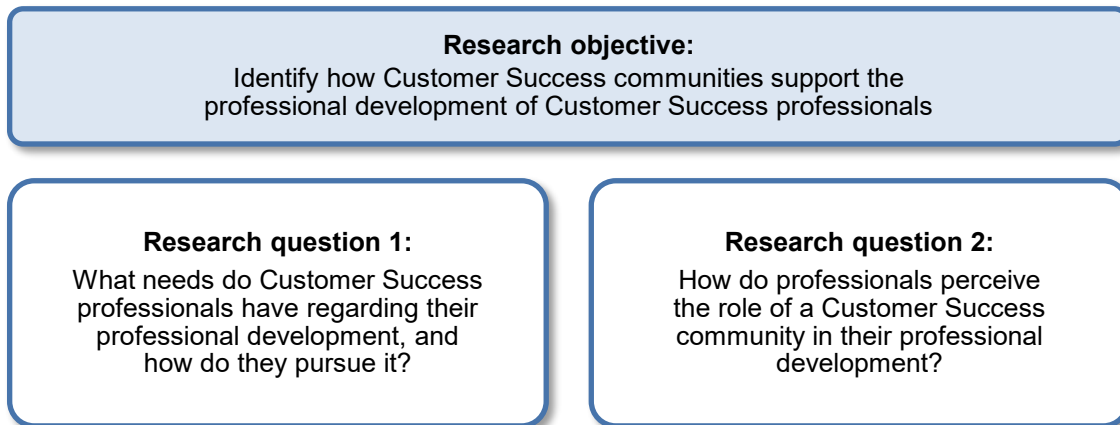
There is currently limited academic research on the professional development of Customer Success professionals, and particularly regarding the role of communities in supporting their professional development. Madruga et al. (2023) have examined nonfirm epistemic communities and their effect on operational factors in Customer Success Management; however, their study does not place emphasis on how these communities influence the professional development of individuals in the field. My research aims to address this research gap by examining how community involvement helps Customer Success professionals develop professionally by expanding their knowledge and enhancing essential skills over time through the exchange of experiences, insights, advice, peer support, and encouragement.

Customer Success Nordics, a community that emerged already more than eight years ago, and has later formalized into an official association, serves as the case study organization for this research. It acts both as a boundary for the researched group (with interviewees gathered from the community's members) as well as a significant contributor to the overall research questions, with the research primarily focusing on exploring the professional development of Customer Success professionals within a local Customer Success community context. Given that Customer Success Nordics is currently the only official Customer Success community in Helsinki and probably in all of Finland, it plays a central role in this entire research. However, the research also explores on the broader aspects of professional development and communities among Customer Success professionals to provide a comprehensive understanding of how communities in general can support and facilitate professional development in the field of Customer Success.

The objective of identifying how Customer Success communities support the professional development of Customer Success is addressed through two research questions (Figure 1). The first research question focuses on identifying the professional development needs of Customer Success professionals and how they pursue professional development. This question is designed to identify the present state of professional development within the Customer Success context, shed light on

the ongoing changes in the field and explain how these shifts affect the developmental needs of professionals. The insights from this question lay the groundwork for the second research question by investigating both the current landscape and future direction of professional development in Customer Success, ultimately advancing the main objective of identifying how the community supports professionals throughout their development.

Figure 1. Research objective and research questions.



The second research question seeks to identify how professionals perceive the role of a Customer Success community in their professional development. This question is intended to explore the various types and levels of support the community offers to its members, aiming to thoroughly understand how professionals interact with it and how they perceive the interactions and their effect in their professional development. Additionally, this question may help discover reasons behind professionals' decisions to seek and join such communities and explore whether there are unique characteristics within the field that prompt them to choose this form of professional development over alternative methods.

Collectively, these two research questions provide a comprehensive view of the aspects of professional development within Customer Success and demonstrate how professionals utilize a community to further their professional growth, ultimately supporting the main objective of the research.

1.4 Research approach and theoretical framework

As the research aims to examine how Customer Success communities facilitate the professional development of Customer Success professionals, the theoretical framework has been focused on three core elements (Figure 2): Customer Success (with an emphasis on the field as a profession), professional development, and Communities of Practice (CoP).

Figure 2. Theoretical elements of the research.



Given that there are no prior studies directly addressing this research scenario, each element will have to be explored separately to create a synthesis. The history of Customer Success will be reviewed to trace the evolution of the profession, while literature on professional development will be analysed to understand both formal and informal methods to professional learning and growth. Finally, the concept of Communities of Practice will be investigated to provide insights into how such communities function as a mechanism for information sharing and knowledge creation within a specific domain. The findings from this literature review will create an initial premise regarding the role of communities in the professional development of Customer Success professionals, which will be iteratively refined and adapted further based on the empirical findings obtained during the qualitative research phase.

1.5 Thesis structure

Following chapter 1 (which serves as an introduction), chapter 2 of the thesis provides an overview of Customer Success, including its origins, main strategies and organizational structures. The chapter also discusses core skills and career paths in Customer Success. Additionally, the latter sections address professional development, including its key drivers and learning methodologies, and introduce the concept of Communities of Practice (CoP), examining their foundations, drivers, and the ways in which they deliver value to members.

Chapter 3 provides an in-depth overview of the research methodology, detailing the case organization, research approach, methods, and data collection procedures. To develop a comprehensive understanding of the case organization's background, mission, operational framework, and current initiatives, I conducted an interview with Maria Rödberg, co-founder of Customer Success Nordics RY. The information gathered from this interview serves as the primary source for the description of the case organization in the methodology section.

Chapter 4 presents a comprehensive analysis of the research results, providing a detailed version of the findings and an in-depth evaluation of the collected data. Chapter 5 provides a critical discussion of these results, placing them within the context of existing theories introduced in former chapters. Finally, chapter 6 concludes the thesis by summarising the main findings and describing the limitations of the research, as well as offering recommendations for future research beyond the scope of this study.

2 Literature review and theoretical frameworks

2.1 Customer Success as a field of profession

2.1.1 The evolution of Customer Success

Customer Success is a relatively new area in business that has quickly gained recognition as one of business' key departments. The Customer Success approach represents an evolution in customer management practices; it describes an approach that anticipates customer needs and supports customers proactively, even before any issues arise (Hilton et al., 2020). It stands for both a discipline and a strategic philosophy, in which organizations implement structured methodologies to support their customers in achieving their objectives through the effective utilization of the supplier's products or services (Adams, 2019).

Although Customer Success wasn't formally introduced until the early 2000s, elements of it existed in business prior to that time. The concept of customer service has a long-standing history, with roles such as customer service managers and support specialists being well established across various industries even prior to the birth of Customer Success. These professionals have traditionally provided guidance and support to customers in relation to the effective use and application of a company's products and services (Adams, 2019). However, these roles have primarily centred on providing reactive support, rather than adopting a proactive strategy to assist customers or understanding their broader strategic objectives and initial motivations for purchasing the product or service (Hochstein et al., 2023). Over time this resulted in a functional gap between sales and support in companies, requiring customers to manage product adoption on their own (Hochstein et al., 2023; Vaidyanathan and Rabago, 2020), until the occurrence of the "churn crisis" (Hochstein et al., 2020; Seidenstricker and Krause, 2023).

The churn crisis began as a consequence of the transition towards cloud computing, which led to increased adoption of subscription-based business models among companies (Eggert et al., 2020; Vaidyanathan and Rabago, 2020). After companies started to provide their services as Software-as-a-Service (SaaS) solutions, customers started to churn more frequently. The barriers to switching to another solution were suddenly much lower compared to maintenance products. If customers were not seeing the value in the service quickly enough, they could make the decision to leave quite lightly (Hochstein et al., 2020; Seidenstricker and Krause, 2023). This meant that the power had shifted from the vendor to the customer (Graesch et al., 2024; Mehta et al., 2016). Recognizing that the cost of acquiring new customers exceeds that of retaining existing ones, these organizations

started to establish Customer Success departments to manage the risk of churn and revenue loss (Seidenstricker and Krause, 2023).

Salesforce played a significant role in this transformation in the early 2000s, addressing a 96% annual churn rate while having more than 20,000 customers (Mehta et al., 2016). The competitive monthly cost per user effectively attracted new customers to the product, but customer retention proved more challenging than expected. Customers did not demonstrate strong loyalty to the product and could quit its use without difficulty. As customer acquisition was expensive and retention was challenging, it led Salesforce to shift its focus to keeping existing customers. This move inspired the creation of Customer Success (Vaidyanathan and Rabago, 2020).

2.1.2 Customer Success as a business methodology

Although Customer Success was originally established to address the challenges associated with churn, its current focus has in fact evolved more towards driving growth, rather than solely mitigating risk. Today, Customer Success serves as a significant driver and contributor to an organization's revenue growth, pushing for increased contract value and maximising Customer Lifetime Value (LTV) (Adams, 2019; Vaidyanathan and Rabago, 2020).

As a relatively new concept in business, Customer Success doesn't seem to have a single definition but is often defined as the *“business methodology of ensuring customers achieve their desired outcomes while using your product or service”*, emphasizing the crucial focus on customer value and alignment with the customer's own objectives (Eggert et al., 2020). It is crucial to separate Customer Success from Customer Support – Customer Success is a distinct function that is all about ensuring customers gain maximum value and full potential from their purchase, driving satisfaction, product adoption and overall success of the customer (Adams, 2019; Vaidyanathan and Rabago, 2020). Customer Success partners up with customers post sales to facilitate the adoption of comprehensive solutions instead of individual products with features, making their role critical in supporting the customer to achieve their desired outcomes (Adams, 2019). As Customer Support primarily operates as a reactive, transactional function, Customer Success is not and should not be designed to fulfil that particular role (Mehta et al., 2016).

For suppliers, the key objective is to retain revenue and maximise LTV, which represents the financial worth generated from each customer. As Customer Success remains closely engaged with customers throughout their journey, helping them in reaching their desired outcomes, it provides the opportunity to recognize potential upsell possibilities and drive for increased contract value. As

their trusted advisor for success, Customer Success can make suggestions for subscription plan upgrades according to the customer's needs and objectives. The cost of expansion revenue from an existing customer is significantly lower than the cost of acquiring a new customer. This unique position Customer Success has during the customer's journey is why they are one of the key drivers of growth in organizations (Hilton et al., 2020; Mehta et al., 2016; Vaidyanathan and Rabago, 2020) and can even serve as a competitive advantage for a company by contributing to a high level of customer experience and product adoption (Adams, 2019). Additionally, Customer Success plays an essential role in supplier organizations in terms of customer centricity. They act as the bridge between the customer and the organization, providing valuable feedback and insights regarding customer's processes, use cases, challenges and pain points, and even competitive solutions. Ultimately, Customer Success should represent the "voice of the customer" in supplier organizations (Eggert et al., 2020).

2.1.3 Organizational structure and the role of Customer Success teams

The importance of a Customer Success department within an organisation increases with the complication of its products; the more complex products, the higher the need to have a dedicated Customer Success department to help ensure customers achieve positive results. Although Customer Success originated in SaaS-based organisations and continues to be most dominant in that sector, there is however a growing number of companies that offer physical products or services who have established dedicated Customer Success teams in their organization. These teams play a crucial role in optimising product adoption and facilitating a successful customer journey (Adams, 2019).

The establishment of a Customer Success department must always begin by positioning Customer Success as a key strategic priority. If the department's role in strategy is not clearly defined, Customer Success may function primarily as a cost centre rather than as a contributor to growth, and it may be perceived mainly as promoting products rather than serving as a trusted advisor (Gelb et al., 2020). Another common pitfall is failing to provide the Customer Success teams with the necessary assets and resources required for effective operations. In some cases, there may not even be a dedicated Customer Success team, and the tasks intended for them are handled by sales, marketing, or support personnel instead, in addition to all their other responsibilities in the company. If Customer Success does not receive adequate time, resources, personnel, systems, processes, objectives, and leadership, its maturity will remain limited, making advancement challenging – until its strategic significance will someday be acknowledged. However, it is

important to recognize that given the relative newness of this discipline, there is no single definitive approach to implementing Customer Success operations within an organization. The operational model for Customer Success should always be tailored to align with the specific nature of the business and the organization's stage in its lifecycle (Adams, 2019).

The best way for Customer Success to operate is by assigning a dedicated team with a leader of its own. However, cross-unit collaboration is considered key for success and organizational effectiveness, and establishing formal connections with other departments such as sales and product development is essential (Hochstein et al., 2023). Ideally, Customer Success is also represented at the executive level, typically reporting to the Chief Customer Officer or Vice President of Customer Success. In smaller organizations, this function may report directly to the CEO, with a Head of Customer Success overseeing departmental objectives, strategic direction, and priorities (Graesch et al., 2024; Hochstein et al., 2020; Hochstein et al., 2023). Team members are generally referred to as **Customer Success Managers (CSM)**. They oversee a portfolio of customers throughout the post-sales process, with primary responsibilities centred on customer retention, contract renewal, and account expansion (Hochstein et al., 2023; Vaidyanathan and Rabago, 2020).

2.1.4 Core skills in Customer Success

There is no universally accepted definition for roles or professionals in Customer Success, as these are shaped by variables such as business type, the strategic placement of Customer Success within the organisation, the nature of the customer base, and the segmentation or tiering strategy that is applied. However, certain core competencies and general skills remain consistently relevant across all strategic Customer Success roles, regardless of a company's organisational structure or operational model.

A key aspect of the Customer Success role, regardless of the touch model or service approach, is developing subject matter expertise. This involves learning about the customer's industry and business area and understanding how the organization's product or service can meet specific needs within that context. Having this knowledge enables the Customer Success Manager to identify customer pain points and requirements, and translate those into customer value (Eggert et al., 2020; Kleinaltenkamp et al., 2022). These skills represent the business knowledge and strategic perspective required for the role, as indicated in the first column of Table 1.

Table 1. Core competencies of a Customer Success professional.

Prepared by the researcher based on the works of Adams (2019), Eggert et al. (2020), Gelb et al. (2020), Graesch et al. (2024), Mehta et al. (2016), and Vaidyanathan and Rabago (2020).

Business knowledge & strategic perspective	Technical expertise & analytical skills	Soft skills & interpersonal abilities
<ul style="list-style-type: none"> • Subject matter expertise and domain knowledge • Ability to understand and align with customer's strategic objectives and business KPIs • Identifying customer value • Customer centricity and commitment to service mindset 	<ul style="list-style-type: none"> • Basic technical proficiency • Product knowledge • Utilization of IT tools and digital solutions • Analytical skills, such as measuring success through product usage data, and detecting customer health risks from data and analytics 	<ul style="list-style-type: none"> • Teamworking skills, cross-collaboration between departments • Relationship management and stakeholder engagement • Empathy and emotional intelligence • Consultative and coaching approach • Coordination skills • Problem-solving skills and ability to work under pressure • Self-leadership skills • Pro-activeness and planning

After establishing domain expertise, it is essential to possess comprehensive knowledge of the company's products or services. A Customer Success Manager's primary responsibility is to facilitate value realization for clients, which requires an in-depth understanding of the product's features and capabilities (Eggert et al., 2020; Vaidyanathan and Rabago, 2020). Customer Success Managers should also be comfortable with technology and able to learn new tools efficiently (Graesch et al., 2024). For organisations operating within the SaaS sector, naturally technology plays already a central role, and Customer Success Management roles frequently involve using additional technical tools beyond CRM systems to track customer health and usage metrics. This work also involves applying analytical skills to identify client behaviour patterns and evaluate potential churn risks (Adams, 2019).

The third segment of skills includes soft skills, which are important for this role. Interpersonal and self-leadership skills complement domain and technical knowledge, enabling the Customer Success Manager to collaborate effectively with others. Customer Success involves building relationships with other departments, which requires teamwork and efficient cross-collaboration. Additionally, the Customer Success Manager should always proactively plan and attempt to identify potential customer issues before they occur, highlighting problem-solving abilities (Adams, 2019).

2.1.5 Becoming a Customer Success professional

Despite the massive potential of Customer Success roles, academic training and research in the field have remained quite limited. While some books have been published and academic studies

conducted (Hilton et al., 2020), there are currently no college or university degree programs which would specifically focus on Customer Success. Some universities offer individual courses and sub-programs related to Customer Success, but these are generally incorporated into other curriculums, rather than offered as a standalone discipline. As a result, careers in Customer Success Management are often pursued by individuals transitioning from related customer-facing areas such as support or sales, rather than being deliberately chosen as an initial career path and profession (Vaidyanathan and Rabago, 2020). Customer Success Managers typically hold degrees in business administration, communications, marketing, technology, or similar fields (Teal, n.d.). In some cases, experience in Customer Success provides insights into customers' needs and use cases, serving as a foundation for roles in product management, marketing, sales, consultancy, business development, operations, or leadership positions within organizations (Vaidyanathan and Rabago, 2020).

Due to the lack of established degree-level academic programs in Customer Success, professionals in this field often rely on both formal and informal methods of development, such as certifications or courses that demonstrate their qualifications and competence. In many Customer Success roles, initial training commonly consists of learning through on-the-job experience. The absence of an official growth pathway could help explain why Customer Success attracts so many career shifters; background and domain expertise which are relevant to the customer's industry can be highly advantageous in Customer Success, providing deep insight into operational practices and industry-specific challenges (Vaidyanathan and Rabago, 2020). For instance, professionals with marketing backgrounds who move into Customer Success roles at marketing technology companies can offer valuable understanding of customer needs and pain points – knowledge that might take significantly longer to acquire for those without a similar background. All of these factors and circumstances highlight the need for alternative approaches to professional development within the field of Customer Success.

2.2 Professional development

2.2.1 Professional development and growth

The concept of professional development is fundamentally viewed as a holistic developmental process, in which individuals enhance their professional expertise (such as specialized knowledge, and practical skills) to meet the evolving requirements and competencies of their work environments. This process may take place at various stages of an individual's career and can be continuous in nature. Professional growth in turn (although sometimes considered as an alternative or comparable expression for professional development) can be considered as the result of

professional development; it involves advancement in one's career or gaining a competitive position in the job market as a consequence of engaging in professional development activities (Pylväs et al., 2022).

2.2.2 Drivers for professional development

Professional development is widely regarded as a critical asset for both organizations and individuals seeking to adapt to change and maintain market competitiveness (Alisara et al., 2022; Pylväs et al., 2022). With economies undergoing rapid transformation due to megatrends and global phenomena (such as the Covid-19 pandemic and climate change) and with ongoing technological advancement and increasing globalization, a new knowledge-based economy has emerged. In this environment, there is a heightened demand for continual skill enhancement (Dall'Alba and Sandberg, 2006; Thomson and Solsvik, 2020). The need for ongoing development has been evident also on an international scale for a while already; for instance, in 2000 the European Council established strategic objectives to position the EU as the world's most competitive and dynamic knowledge-driven area. To realise the vision, the European Commission implemented a comprehensive strategy aimed at facilitating the transition to a knowledge society, emphasising lifelong learning and skills improvement (Thomson and Solsvik, 2020). These initiatives only highlight the essential role of continuous professional development as a pivotal response to future challenges.

Beyond ensuring stability in the labour market, an individual's motivational driver for their professional development generally arises from the pursuit of success and advancement within their career. Among critical competencies, soft skills (such as communication, leadership, problem-solving, and teamwork) play a pivotal role in fostering individual achievement, income growth, and career progression. As reported by Alisara et al. (2022), soft skills contribute approximately 85% to personal success, whereas hard skills account for about 15%. Interestingly, these types of skills are also considered less likely to be replaced by technology. Polo (2005) suggests that an individual's motivation for professional development relates to the humanistic theory that every individual possesses an inherent nature and significant potential for growth. According to this view, personal improvement and striving toward societal ideals are seen as individual responsibilities. Thomson and Solsvik (2020) describe that participating in professional development enhances workplace competence, self-confidence, and professional identity, which may also serve as factors motivating individuals to pursue such development (Thomson and Solsvik, 2020).

2.2.3 The role of lifelong learning in professional development

Market conditions are subject to frequent and rapid changes, making it unlikely that a single academic qualification will remain sufficient throughout an individual's career. The importance of ongoing professional development has increased, as the idea and concept of achieving competence solely through initial education, is now outdated. While formal education systems (like university degrees or vocational qualifications) typically prepare individuals for specific roles and support workforce needs, they should be seen as a foundation for competence. An individual's competence journey will inevitably continue after graduation and development can and should take place throughout their career. This concept of lifelong learning has become essential for adapting to societal and technological developments and maintaining competitiveness in professional environments (Nokelainen et al., 2009; Pylväs et al., 2022).

Many industries are characterised by evolving skill requirements, demanding that professionals continuously renew their competencies (Dall'Alba and Sandberg, 2006). Sustained career longevity is dependent on an individual's abilities to adapt their skills in response to changing demands (Polo, 2005; Thomson and Solsvik, 2020). Keeping knowledge current and developing skills further are essential for remaining competitive in today's labour market (Pylväs et al., 2022; Thomson and Solsvik, 2020). Responsibility for professional development increasingly falls on the individual; rather than relying solely on employer's efforts, individuals must proactively manage their own development and growth, guided by personal motivation, aspirations, opportunities, needs, and objectives (Polo, 2005; Pylväs et al., 2022).

Then again from an organizational perspective, professional development is equally critical. Companies often identify gaps between existing skills and those which are required to achieve strategic objectives. Addressing these competency gaps requires organizations to continually assess personnel capabilities, plan strategically, and provide support for ongoing employee development to succeed (Thomson and Solsvik, 2020). Additionally, professional development fosters innovation within organizations. Without continual expansion of knowledge, businesses may lack the creativity needed to develop innovative solutions and technologies for future challenges (Pylväs et al., 2022).

Then there are certain situations, where professional development serves as an essential mechanism for gaining expertise; for instance, in fields where formal academic programs may either be unavailable or unable to keep pace with rapid advancements (Dall'Alba and Sandberg, 2006) – such as in Customer Success. According to Denning and Dunham (2003), the capacity to deliver value and satisfaction is the most significant factor in both business and professional success. Professional

development should promote practices and perspectives that incorporate an understanding of, and attention to, the customer. For instance, in roles in service or technology sectors (like software development or design), professional development establishes the foundation for design practices, by ensuring technical skills are aligned with current customer commitments or market needs.

2.2.4 Learning approaches in professional development

The scope of professional development is broad, and it has a variety of dimensions, ranging from educational programs to continuous learning embedded in daily work activities. To further explore these dimensions, professional development approaches are commonly categorized into **formal** and **informal** learning approaches (Dall'Alba and Sandberg, 2006; Pylväs et al., 2022).

In the context of professional development, formal learning refers to structured activities and courses that professionals participate in with the intention of improving specific skills or knowledge (Table 2). These activities may stem from individual motivation and professional targets and objectives, or may be offered by employers for strategic purposes, such as facilitating organizational change. Formal methods typically include a variety of courses, workshops, or higher education programs (Dall'Alba and Sandberg, 2006; Pylväs et al., 2022).

Table 2. Comparison of formal and informal learning in professional development.

Prepared by the researcher based on the works of Alisara et al. (2022), Dall'Alba and Sandberg (2006), Nokelainen et al. (2009), Pylväs et al. (2022), Thomson and Solsvik (2020).

	Professional development through formal learning	Professional development through informal learning
Definition	Planned and structured activities or courses that develop professional skills, maintain current knowledge and keep professionals up to date, or support organizational change through focused learning. Involves intentional and directed learning.	Usually unsystematic and incidental activities, focusing on practice. Learning occurs unintentionally through practical interaction with the environment.
Measurability	Generally easier to assess and measure as completed.	Often more difficult to assess or measure.
Quantity	In fact only a small part of workplace learning occurs in official training sessions.	The largest part of learning at work occurs in an informal manner; during the actual workday or through social interaction; when learning from others.

	Professional development through formal learning	Professional development through informal learning
Examples of activities	<ul style="list-style-type: none"> · Formal professional education programs · Training and classes · Online courses · Structured activities and workshops 	<ul style="list-style-type: none"> · Collaboration and social interaction with colleagues and through other networks · Practicing skills in action · Learning-on-the-job · Dialogue and team learning · Learning through problem-solving · Gaining tacit knowledge from more skilled professionals · Self-reflection · Peer-to-peer learning, mentorship, job shadowing

Informal development in turn frequently occurs within the day-to-day work of professionals, described as "learning-on-the-job" by Dall'Alba and Sandberg (2006). This form of learning is less systematic and can be incidental, arising through practical workplace experiences such as learning from mistakes or engaging in problem-solving activities. Another example is critical reflection, which may take place individually or, more effectively – in group settings. When professionals engage collectively in dialogue about specific topics and deliberate on strategies to enhance their work, they gain exposure to diverse perspectives and approaches. This interaction allows for critical evaluation, fosters the challenging and broadening of understanding, and ultimately contributes to a more robust collective knowledge base and improved practices (Dall'Alba and Sandberg, 2006; Pylväs et al., 2022). Thus, informal learning plays a significant role in professional growth, as it typically facilitates the transfer of specialized, often tacit, organizational or domain-specific knowledge. Notably, research suggests that the majority of workplace learning occurs informally, establishing it as the primary approach for professional development (Pylväs et al., 2022; Thomson and Solsvik, 2020).

Adopting a holistic approach to professional development involves an ongoing process that integrates both formal and informal learning elements. Professional development is not limited to obtaining a degree or a one-time educational achievement; rather, it encompasses both degree-based knowledge and evolving developments in social capital such as critical thinking, soft skills, empowerment, and emotional intelligence and capabilities acquired through diverse learning methods (Alisara et al., 2022; Pylväs et al., 2022). In essence, formal education serves as the foundation upon which informal learning builds; it provides structured knowledge and skills, whereas informal experiences foster practical proficiency and situational expertise. It is vital for organizations to acknowledge that socio-economic shifts will drive for continuous skill enhancement, demanding comprehensive formal and informal professional development initiatives,

as well as management practices including appraisals, career advancement strategies and pay systems (Dall'Alba and Sandberg, 2006; Pylväs et al., 2022).

2.3 Community of Practice (CoP)

2.3.1 Introduction to Communities of Practice

A striking example of an effective learning method is the formation of professional communities, which are groups established by professionals seeking peers who share a mutual interest or passion within a specific field or domain. These types of groups are called **Communities of Practice (CoP)**, traditionally considered as informal and self-organized, focusing on knowledge creation related to their common area of interest. However, as society has over time shifted more towards a knowledge-based economy, these communities have also started to establish more formal structures, including organizations or associations with defined membership models and carefully designed offerings (Lesser et al., 2009; Vincent et al., 2018; Wenger, 1998).

The concept of CoP was first introduced in 1991 by researchers Jean Lave and Etienne Wenger to describe a system of relationships among individuals, activities and the broader environment that evolves over time in connection with other overlapping communities. Following their initial groundbreaking work, interest in CoPs has expanded significantly since, and the term is now also frequently associated with other well-established fields of research, such as knowledge management and organizational learning (Ali et al., 2022; Correia et al., 2010; Pemberton and Mavin, 2007). The concept is considered to consist of three core structural components, which define its existence – domain, community, and practice:

- **Domain:** Members of the community possess a shared interest, passion, or area of expertise, or they address similar sets of problems or concerns. This common cause establishes the community's collective identity and overarching purpose (Chua, 2006; Li et al., 2009; Mavri et al., 2021; Wenger-Trayner et al., 2023).
- **Community:** The existence of a CoP is fundamentally dependent upon its members, positioning the community as a key element of this concept. Community represents the dimension of social structure, emphasizing that the development of expertise within the domain depends on interactions and relationships among members, which are built on trust and mutual respect (Chua, 2006; Li et al., 2009; Pemberton and Mavin, 2007; Wenger-Trayner et al., 2023).
- **Practice:** Practice refers to a shared repertoire of communal resources. This element includes frameworks, stories, tools, and even the language that is developed within the community, as well as the knowledge created among its members. Essentially, practice

describes the particular knowledge that community members collectively develop and sustain (Chua, 2006; Lesser et al., 2011; Li et al., 2009; Mavri et al., 2021; Wenger, 1998).

When these three elements of CoPs are nurtured equally and considered holistically, the community can mature and evolve toward its optimal structure, with an emphasis on delivering meaningful value to its members (Chua, 2006; Lesser et al., 2011; Li et al., 2009; Wenger, 1998). Gaining value from the community is essential for the members' continued engagement and investment of time in the community (Lesser et al., 2011; Wenger, 1998; Wenger-Trayner et al., 2023).

2.3.2 Development and formation of Communities of Practice

Although the concept of CoP is relatively recent, such communities have existed for a considerable period. Since early human history, individuals have formed groups, sometimes as a means of survival in nature (Lesser et al., 2011; Wenger-Trayner et al., 2023). This phenomenon arises from the inherently social character of knowledge, with communities providing an effective framework for facilitating knowledge sharing (Chua, 2006).

Today, CoPs are often established organically inside organizations, as individuals start spontaneously to collaborate to address recurrent challenges, without a really conscious intention to form a community. These types of informal communities tend to be stronger, more resilient and effective by nature, because they emerge from genuine enthusiasm and real, actual needs for improvement (Chua, 2006; Pemberton and Mavin, 2007; Wenger, 1998). However, CoPs can also be initiated formally, through top-down approaches, benefitting from organizational support and recognition. But these types of structured, formal CoPs may often lack the same authenticity, commitment, and sense of ownership, which are the typical characteristics of an informally developed community. And while top-down CoPs typically have greater access to resources and organizational backing (advantages that informal, bottom-up communities may not possess) the significance of organic development of a community should not be underestimated. For example, Chua (2006) found that the formation of a CoP led to a failure after it became a "pseudo-community", one that lacked the initial natural engagement, passion, and authentic drive for meaningful connections around the shared interest. This truly highlights the critical role of genuine community spirit in the success of CoPs.

Then sometimes CoPs are established across organizational boundaries. In rapidly evolving sectors such as technology, broadening perspectives beyond individual company limits is often essential, as the knowledge required by individuals or organisations may not yet exist internally. This drives a

need to seek expertise externally, resulting in inter-organisational networks and CoPs. Within these groups, mutual trust and balanced trade of knowledge becomes particularly critical, given that members may represent competing organizations, therefore creating a complex relationship between competition and collaboration. The practice of sharing of information should be a mutually beneficial effort and reciprocated activity, with all parties committed to improving together, not working against each other (Lesser et al., 2011; Pemberton and Mavin, 2007; Wenger, 1998). Strikingly, these types of inter-firm communities have frequently emerged among Customer Success professionals, fostering grass-roots groups focused on collaborative learning. This stands in contrast to sales (which is a much longer established discipline) where knowledge-sharing and knowledge-transferring communities have traditionally been more strictly inward-looking, prioritising the protection of proprietary information from competitors (Madruga et al., 2023).

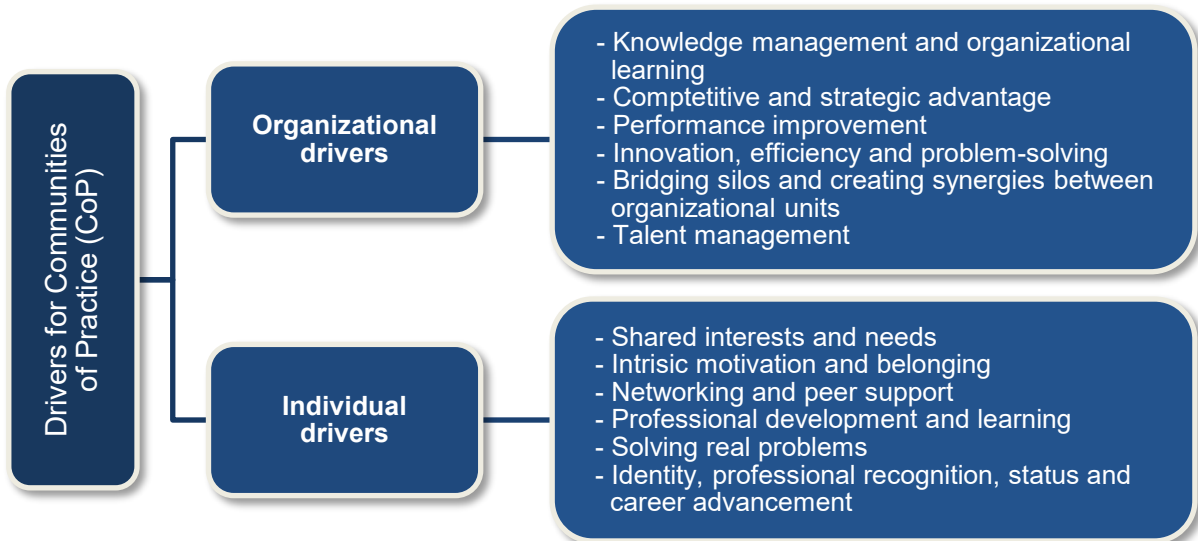
2.3.3 Drivers for Communities of Practice

As now established, CoPs may develop informally through self-organization, or they can be formally established for instance inside an organization, by the organization. While these informal and formal CoPs share some overlapping themes such as learning and problem-solving, and can even co-exist, they also have their distinct differences (Pemberton and Mavin, 2007).

Organizational drivers (illustrated in Figure 3) for the formation of CoPs are often aligned with organizations' strategic needs. With markets undergoing changes due to technological advancements and globalization, organizations must innovate and strive to maintain their competitiveness. CoPs contribute to knowledge creation within the organization, supporting the organization's competitive advantage by enabling effective work practices and improving customer experience, which can impact revenue (Correia et al., 2010; Lesser et al., 2011; Pemberton and Mavin, 2007). Additionally, CoPs can help break internal silos by building communication across units, support the development of strategic capabilities, facilitate change management, enable faster problem resolution, and help transfer best practices across projects and departments. The establishment of CoPs is also associated with positive effects on employee recruitment and retention, as they foster a sense of community, support organizational culture, provide an encouraging environment to learning and innovation, and offer opportunities for professional involvement and development. These factors collectively encourage employee engagement and loyalty, motivating individuals to invest in their professional growth and remain in the organization (Pemberton and Mavin, 2007; Wenger-Trayner et al., 2023; Wenger and Snyder, 2000).

Figure 3. Individual and organizational drivers for Communities of Practice.

Prepared by the researcher based on the works of Chua (2006), Correia et al. (2010), Lesser et al. (2011), Li et al. (2009), Mavri et al. (2021), Pemberton and Mavin (2007), Wenger (1998), Wenger and Snyder (2000) and Wenger-Trayner et al. (2023).



Individual drivers play a significant role in the formation of informal CoPs, which are often established through personal initiative by individuals sharing a mutual interest or passion for a specific domain. This formation is closely linked to intrinsic motivation for self-improvement and a sense of belonging within a community that facilitates both receiving and offering support. Being able to give back to the community does not only provide recognition as a professional but can also enhance status and strengthen one's professional identity (Chua, 2006; Correia et al., 2010; Mavri et al., 2021; Pemberton and Mavin, 2007; Wenger-Trayner et al., 2023). Additionally, the pursuit of deepening knowledge and expertise can serve as a key driver for CoPs, particularly among novice professionals aiming to improve in their profession by learning from more senior colleagues. The desire to interact with other members, exchange knowledge, and gain access to otherwise unavailable resources also acts as a driving force. Overall, professional development and continuous learning emerge as the primary incentives for individuals to engage in CoPs. These communities are perceived as platforms for exchanging ideas, leveraging personal expertise and knowledge, collaborative problem-solving, skill building, and networking – all of which contribute positively to individual's capabilities and career advancement (Li et al., 2009; Lesser et al., 2011; Pemberton and Mavin, 2007; Wenger-Trayner et al., 2023; Wenger and Snyder, 2000).

2.3.4 Social capital in Communities of Practice

The main purpose of CoPs is to deliver value to their members, whether they originate informally among individuals or are formally established by organizations. A CoP cannot sustain itself without

providing meaningful value to its participants. Typically serving as adaptable and dynamic sources of knowledge, CoPs offer advantages to both individual members and their host organizations. The primary value proposition of CoPs lies in their unique ability to facilitate the development, distribution, and management of knowledge through social interaction, essential for maintaining competitive advantage and supporting organizational sustainability (Chua, 2006; Lesser et al., 2011; Pemberton and Mavin, 2007; Wenger, 1998). This value of CoPs is frequently explained through the theory of **social capital**, which refers to the resources professionals gain through their relationships and networks within the community. Social capital serves as a significant asset for CoPs by converting member relationships into mutual benefits that support individual performance and professional development, making it a key characteristic of a dynamic and prosperous community (Chua 2006; Dulkiah, 2025; Nahapiet and Ghoshal, 1998; Pemberton and Mavin, 2007; Porter et al., 2023). In the context of CoPs, social capital's most critical elements are trust, networks, and shared values, all of which facilitate effective collaboration between a community's members. It means that rather than concentrating on physical or financial assets, social capital in fact recognises the importance of social structure as a resource (Dulkiah, 2025; Nahapiet and Ghoshal, 1998). Nahapiet and Ghoshal (1998) have identified three principal, interconnected dimensions of this resource: structural, relational, and cognitive (Table 3).

Table 3. Dimensions of social capital.

Prepared by the researcher based on the work of Nahapiet and Ghoshal (1998).

Dimension	Definition	Provided value
Structural dimension (The network)	<ul style="list-style-type: none"> • Pattern of interaction • Social networks and connections 	<ul style="list-style-type: none"> • Access to other people to exchange knowledge • Information benefits
Relational dimension (Trust)	<ul style="list-style-type: none"> • Trust and loyalty • Quality and type of personal relationships members develop with each other 	<ul style="list-style-type: none"> • Co-operation • Candid communication • Receiving help
Cognitive dimension (Shared resources)	<ul style="list-style-type: none"> • Mental resources, common language • Shared systems of meaning and vision 	<ul style="list-style-type: none"> • Meaningful communication • Capability to combine knowledge

The structural dimension describes the overall patterns of connections within a community; who members are interacting with, and how they are interacting with each other. In terms of value, this dimension represents the access a CoP provides to its members by establishing professional social network for information exchange (Dulkiah, 2025; Nahapiet & Ghoshal, 1998).

The relational dimension represents the type of relations that individuals within a network develop with each other. The presence or absence of trust and loyalty among community members

influences majorly to the quality of discussion, co-operation, assistance, and knowledge sharing. These aspects are considered central values associated with this dimension (Chua, 2006; Dulkiah, 2025; Nahapiet & Ghoshal, 1998).

The cognitive dimension refers to the collective mental resources that enable members to comprehend one another, communicate using a shared language, and share meanings related to a community's domain or area of interest. When this cognitive dimension in the community is strong, it supports meaningful communication among members and facilitates the integration of knowledge from various experiences, as members can discuss their issues using terminology that is commonly understood (Chua, 2006; Dulkiah, 2025; Nahapiet & Ghoshal, 1998).

In essence, the value proposition of CoPs emerges in various forms and dimensions, fundamentally grounded in the social interactions among members that generate social capital. This highlights the importance of cultivating relationships within this communal context to optimize value for both the members and any supporting organization behind it.

2.3.5 Communities of Practice in Customer Success

As we have now established, the strength of CoPs lies in their capacity to facilitate the exchange of essential knowledge and harness collective expertise to solve problems as well as drive individual growth and organizational change. In emerging fields like Customer Success, CoPs could serve as vital sources of knowledge, enabling the distribution of best practices and the discussion of industry trends and challenges (Ali et al., 2022; Madruga et al., 2023; Wenger-Trayner et al., 2023).

Engaging in networking and leveraging the community as an informational asset is often significantly more effective than independent research, as it offers valuable peer insights and reflective feedback that other, more isolated methods of development typically lack (Porter et al., 2023; Wenger-Trayner et al., 2023). Furthermore, it is important to remember that soft skills are a fundamental component of the Customer Success professional's skill set. These abilities, which are also essential in networking, enhance communication proficiency through meaningful dialogue, empathy, active listening, and relationship-building. Engaging with a CoP could also provide access to more senior professionals, who may serve as mentors, allowing for valuable insights and perspectives that support the professional development of individuals (Goolsby and Knestrick 2017; Isabirye et al., 2024).

While the influence of a CoP on professional development may initially appear intangible, a thorough evaluation of its outcomes and advantages demonstrates substantial benefits. At best,

CoPs serve as platforms for members to expand their collective expertise within their area of interest and offer endless opportunities from exchanging insights, to receiving ongoing support, to staying informed about industry trends, to making a meaningful impact, to developing professional identity, to leveraging community connections for career advancement – and so much more (Bowskill et al., 2000; Goolsby and Knestrick, 2017; Isabirye et al., 2024; Owens and Young, 2008; Wenger and Snyder, 2000). And in the context of today's dynamic economy, it truly is essential for professionals to consistently invest in expanding their networks to further their careers and build social capital, highlighting the importance of CoPs in professional development (Huang, 2020; Nigar, 2021).

Drawing from these remarks, my initial premise is that active engagement in a Community of Practice dedicated to Customer Success is likely to be positively associated with the acquisition of specialized, job-relevant knowledge (such as best practices or technology adoption) among Customer Success professionals. The literature review indicates that CoPs may serve as successful mechanisms for knowledge sharing, enhancing individual expertise. Through exchange of experiences and collaborative problem-solving, members could be able to address common challenges and share valuable insights and techniques to each other. This process may even be instrumental in gaining an understanding of emerging and existing Customer Success practices and trends, facilitating discussions on implementing best practices, and overcoming obstacles within a field that continues to rapidly evolve and lacks a unified disciplinary framework (Madruga et al., 2023; Vincent et al., 2018; Wenger and Snyder, 2000).

3 Research methodology

3.1 Research approach and method

The aim of this study was to examine how Customer Success communities support the professional development of Customer Success professionals, and since there is limited existing research on this specific phenomenon, I chose the qualitative method as my research approach for this study.

Qualitative research is particularly well suited for any research that seeks to investigate complex human behaviours, social dynamics, processes and phenomena (Eriksson and Kovalainen, 2016), making it an ideal method for this research, as it is essential to gain insights into the personal experiences of Customer Success Nordics' members to identify their professional development objectives, outcomes, and understand the role that this specific community plays in supporting these aims. Through a qualitative method, I could capture the subjective experiences and viewpoints of the community members regarding their professional development in Customer Success and their utilization of the community's resources. While quantitative methodologies could have been considered for this research, they would have required a stronger foundation in existing literature and therefore a narrower focus on only one of the domains (either Customer Success, professional development, or Communities of Practice) to enable the testing of existing theories to reach statistical generalization. The use of qualitative methodology enables an integrated exploration of all three domains, allowing a holistic view and a comprehensive analysis of the complex interactions and relationships among these themes (Gibbs, 2012; Eriksson and Kovalainen, 2016).

This study also utilizes an intensive case study method, as the research focuses mainly on a single community located in Finland: Customer Success Nordics. As mentioned already in the beginning of this thesis, the interest for investigating this particular community originated from my direct experience with it and my initial observations regarding its potential to facilitate professional development among individuals; having been a member of this community for some years already, I was interested in assessing whether others perceived similar value. The entire idea and concept of the research was structured around this specific organization, which aligns with standard case study method, where the primary emphasis is on the case itself and understanding comprehensively the facts related to it from the perspective of its participants, rather than on testing predetermined theoretical propositions (Gillham, 2000; Eriksson and Kovalainen, 2016; Swanborn, 2010). Case studies are a strong fit for studies such as this one, as they involve authentic contexts and human activity, enabling the collection of evidence directly from the unique setting in question (Gillham, 2000).

Due to limited prior research, this study is exploratory and employs an abductive approach, in which theory is iteratively developed alongside data collection (Gibbs, 2012). I draw the synthesis from three distinct themes: Customer Success, professional development, and Communities of Practice, and empirical findings from the qualitative research part modify the understanding of the topic, contribute new knowledge, and potentially even lead to the development of new theories, as the research investigates an underexplored area (Gibbs, 2012; Swanborn, 2010).

3.2 Case organization: Customer Success Nordics RY

The case company for this research was Customer Success Nordics RY, which is a professional community and non-profit association committed to advancing excellence in Customer Success across the Nordic region and beyond. The association offers a comprehensive platform for individuals engaged in Customer Success – whether seeking career advancement or simply interested in the field – to connect, participate in events, share knowledge, and access mentoring opportunities related to Customer Success (M. Rödberg, personal communication, October 9, 2025).

3.2.1 Community evolution

The community was established around 2018 through the initiative of Customer Success Network, which is the first global Customer Success peer-learning community for Customer Success professionals (Customer Success Network, n.d.). They started to organize local meetups in Helsinki, operating under the name “Customer Success Café Helsinki”, to share ideas and experiences around Customer Success. Over time, the group rebranded as Customer Success Nordics and was formally registered as an association in January 2025 (M. Rödberg, personal communication, October 9, 2025).

One of the founders of the association, Maria Rödberg, had discovered the community and joined the team in August 2021. She took on the responsibility of organizing gatherings and initially arranged informal meetings at local pubs. These events gradually developed into more structured events featuring local speakers, presentations, and networking opportunities. Drawing on feedback from attendees, Maria started to identify significant interest in the community from its members; there was a clear demand for a community like this. To streamline communication regarding upcoming events, she launched a LinkedIn page for the community in 2021. The community has since expanded to over 1100 members. While its early membership base largely included job seekers and individuals navigating career transitions, it now predominantly consists of Customer

Success Managers – with approximately 65% of participants employed in Customer Success roles (M. Rödberg, personal communication, October 9, 2025).

3.2.2 Key activities

The community’s key activities are their events and programmes, which they utilize as strategic methods to achieve their core objective; fostering connections that facilitate the exchange of knowledge and networking opportunities. Their primary focus lies on three categories of activities, outlined in detail in Table 4 (M. Rödberg, personal communication, October 9, 2025).

Table 4. Activity types offered by Customer Success Nordics RY.

Prepared by the researcher, based on personal communication with Maria Rödberg, October 9, 2025.

Activity type	Format and description	Audience	Access
Core events	Usually feature a speaker and slides, followed by round-table or small-group discussions. Topics vary each time but always focusing on the core of Customer Success (e.g. churn prevention).	Individual contributors (65% Customer Success or Account Managers)	Always free by default
Leadership events	Uses a strictly different format, typically mastermind sessions held in a conference room. Events involve only 12 invited acting leaders in Customer Success.	Invited leaders in Customer Success	Access by invitation only
Mentorship program	Connects mentees and mentors. Includes an initial group session where the framework is shared, followed by scheduled 1-on-1 calls. Mentee requests guide mentor matching.	Career transitioners and those seeking specialized knowledge	An exclusive perk for paid members

The primary activity of the community centres on its **core events**, which are held bi-monthly in the Helsinki area. Typically, the core event is sponsored by a local company that also provides the venue for the event. Over time, both the format and location of these gatherings have evolved; in recent years, they have typically featured one or two keynote speakers, often representing the sponsoring organization. These speeches are generally followed by roundtable discussions focused on the day’s topic, promoting knowledge exchange and dialogue among participants. According to Maria Rödberg, this type of a structure also facilitates organic networking opportunities, which she considers an important element of the community (personal communication, October 9, 2025).

The community places particular emphasis on organizing physical events, recognizing the value of authentic, in-person interactions. Additionally, the community maintains an informal confidentiality policy, communicated at each event: what is discussed within the group, remains confidential. By

minimizing the risk of unauthorized recordings through in-person gatherings, the community advances its mission to foster trust and genuine engagement (M. Rödberg, personal communication, October 9, 2025).

Another event format offered by the community is exclusive **leadership events**, which have recently evolved into a mastermind session format. In these sessions, twelve leaders receive invitations to participate and exchange insights with their peers on a selected topic. These events are held quarterly (M. Rödberg, personal communication, October 9, 2025).

The third main activity type is a **mentorship program**, which was developed in response to member requests and demand. Many career shifters from the community had approached Maria Rödberg over time about connecting with more experienced Customer Success professionals, leading to the creation of the mentorship initiative. The program aims to match community members with more senior Customer Success professionals, who can offer guidance in relevant areas (M. Rödberg, personal communication, October 9, 2025).

3.2.3 Membership levels and operational funding

The community utilises a freemium model, offering all core events free of charge to every member. Members may choose to upgrade to a paid membership for an annual fee, which provides access to the mentorship programme, exclusive content, and a private job market featuring select vacancies available solely to paid members (M. Rödberg, personal communication, October 9, 2025).

The community's operational funding model is however moving increasingly towards a sponsorship-based model, where companies pay to host the events. According to Maria Rödberg, this approach offers organizations several advantages, such as enhancing their reputation as thought leaders in Customer Success, establishing themselves as subject matter experts (for instance in areas like renewals), and accessing a network of skilled Customer Success Managers within the community (personal communication, October 9, 2025).

3.2.4 Member profile and acquisition

At its inception, the community primarily attracted job seekers and individuals interested in networking opportunities. However, over time, it has succeeded in drawing a more targeted audience, with 65% of members currently holding positions in Customer Success. Additional participants at events typically represent other areas in business, for instance sales, customer

support, marketing, or business development, while a portion continue to be job seekers aiming to transition into Customer Success roles (M. Rödberg, personal communication, October 9, 2025).

Members typically possess 2-3 years of experience in Customer Success and are primarily based in the Helsinki area. However, there are notable exceptions, with some individuals traveling from other Finnish cities such as Turku, Tampere, and Jyväskylä, and occasionally even from Tallinn, Estonia, to attend events. Also, a notable aspect of the community is its international appeal; although its primary operations are within the Finnish market, approximately 60% of its members have an international background (M. Rödberg, personal communication, October 9, 2025).

Regarding member acquisition, individuals typically discover the community's core events through LinkedIn or through network referrals; those who appreciate the events often return with a colleague or friend. Additionally, Maria Rödberg actively extends personal invitations via LinkedIn to continually attract new talent, with an emphasis on engaging those who have not previously attended but would align well with the ideal member profile, such as Customer Success Managers. The events consistently demonstrate a high rate of return attendance, indicating the substantial value the community offers its members (M. Rödberg, personal communication, October 9, 2025).

3.3 Data collection

The primary data collection method in this research was qualitative semi-structured interviews with community members. This approach facilitated an in-depth examination of members' perspectives regarding their experiences within the community; the support they received, perceived benefits, activities and interactions, and the outcomes related to their professional development. Through these interviews I gained insights into the ways the community supported members throughout their professional journeys and helped identify potential explanations for these experiences (Gillham, 2000).

3.3.1 Interview format

The research data primarily consists of eight individual, semi-structured interviews conducted with members of the Customer Success Nordics community. Additionally, I carried out a separate semi-structured interview with one of the founders of the case organization to gain a deeper understanding of its objectives and mission. The findings from this interview were used to in the introduction of the case organization in section 3.2.

Semi-structured interviews are widely recognized as an effective method for qualitative research, as they have the advantage of generating more systematic and comprehensive data compared to unstructured interviews, while maintaining some flexibility (Eriksson and Kovalainen, 2016). In this study, this method was particularly suitable due to the research's exploratory nature, which allowed for unanticipated insights and discoveries. This approach allowed for the initial pre-design and definition of specific themes relevant to the study, while maintaining adequate flexibility for participants to elaborate on most significant topics. Additionally, it enabled the scope of interviews to be extended, allowing me to pose further questions and explore related themes beyond the original interview framework.

3.3.2 Participants of the study

The group examined in this study consisted of eight individuals from the Customer Success Nordics community (Table 5). Participants were selected using purposeful sampling, in collaboration with the founder of the case organization, who identified active or moderately active members considered suitable for the research. Purposeful sampling was utilized to align participant selection with the research objectives, ensuring the collection of rich and relevant data, as recommended by Eriksson and Kovalainen (2016).

Table 5. Research interviewees.

Interviewee ID	Title/profession	Experience in CS	Active in community	Duration of interview	Interview language
Member A	Customer Success Manager	5 years	5 years	56 minutes	Finnish
Member B	Customer Success Team Lead	7 years	1 year	49 minutes	English
Member C	Director of Customer Success	8 years	3 years	45 minutes	Finnish
Member D	Customer Success Manager	5 years	3 years	43 minutes	Finnish
Member E	Customer Success Team Lead	3 years	3 years	41 minutes	Finnish
Member F	Customer Success Manager	1 year	2 years	42 minutes	English
Member G	Head of Customer Success	5 years	4 years	63 minutes	English
Member H	Head of Customer Service	5 years	2 years	56 minutes	Finnish

The primary focus of this research (as well as one of the ideal profiles for Customer Success Nordics), was individuals currently working in Customer Success roles. Accordingly, interview subjects were selected based on their experience and direct involvement in Customer Success positions. Although the Customer Success Nordics community does include many members outside of Customer Success, interviews were purposefully limited to those with established careers and relevant job titles in this field to maintain relevance to the research objectives. The only exception to this rule was Member H, who holds the position of Head of Customer Service – however, given

their substantial background in Customer Success and the inclusion of related responsibilities within their current role, they were considered an appropriate participant for this study.

The participants represented a diverse range of backgrounds and levels of experience. While a majority had prior experience in sales, many participants had also held roles in other commercial sectors, including support, project management, marketing, logistics, tourism and event production – highlighting Customer Success as a promising field for career shifters. Their years of experience in Customer Success ranged from one to eight, and five participants held leadership roles in their organizations in this area. Participants also differed in their level of engagement with the community and duration of membership. Some attended more actively than others, emphasizing only the core events, others participated additionally in leadership sessions or the mentorship program. And while some members became active one or two years ago, others have been involved longer, one even being a member since the community's early days. Overall, the profiles of all participants were consistent with the research objective and contributed relevant information to address the research questions and provide insights into the professional development of Customer Success professionals through communities.

3.3.3 Communication and scheduling

Initial contact with potential interviewees was made by the founder of the case organization to confirm their interest in participating in the study. Once individuals expressed willingness to take part, I followed up via email and/or LinkedIn to provide detailed information about the research, confidentiality measures, informed consent, data protection, and interview scheduling.

All interviews were conducted remotely via Microsoft Teams and took place between October and November 2025, ranging from 41 to 63 minutes in length, excluding additional conversations related to the research and other topics. The remote format facilitated efficiently the recording and transcription process of the sessions. All recordings were destroyed afterwards.

Given that 60% of the community members have an international background, this influenced both the language used in the interviews and in this thesis. Three of the interviews were conducted in English, while the remainder were held in Finnish. The interview with the founder of the community was conducted in English. As this thesis is composed in English, it was especially crucial to ensure precise interpretation throughout the analysis phase, as well as during the earlier stages of the research process.

3.3.4 Interview framework

The interview framework (Appendix 1) was constructed based on five principal themes:

1. Background, career path and motivation
2. Professional development as a Customer Success professional
3. Supporting professional development – Customer Success Nordics
4. Improvement ideas and future of the community
5. Conclusion

The opening theme (*Background, career path and motivation*) aimed to gain insight into the interviewee's seniority, career progression, current role, and future aspirations in order to develop a comprehensive understanding of their background. The second theme (*Professional development as a Customer Success professional*) began to shift the focus more towards the theme of professional development, with the aim of discussing the general relevance of professional development in Customer Success, identifying the core skill set critical to have in a Customer Success role, and investigating how professionals in this field typically pursue their own development.

The third theme (*Supporting professional development – Customer Success Nordics*) served as the primary focus of the interview, concentrating on the professional development of the interviewee specifically through engagement with the Customer Success Nordics community. This theme was particularly important for advancing the research objective, as it examined the community's role in supporting members' professional development. This section also enabled members to compare previously discussed methods of development with those offered by the community, highlighting the distinct advantages that a community may provide over more traditional learning approaches.

The fourth theme (*Improvement ideas and future of the community*) aimed to gather insights on factors for enhancing the community and identifying future trends that should be considered when further developing the offering. The final section (*Conclusion*) was designed to summarize the community's benefits and unique features of the community as a platform for professional development and allow members to add any final comments.

3.4 Analysis

The method used for this research was thematic analysis, which is well suited to the examination of complex, non-numerical, qualitative data and aligns with the research objective. This approach is particularly appropriate given the use of an abductive methodology, which begins by focusing on experiences related to a particular phenomenon: community of Customer Success professionals.

Thematic analysis offers a systematic framework for transitioning from empirical observations to theoretical concepts and themes and back, moving forward iteratively, which represents the central logic of abduction (Braun and Clarke, 2022; Gibbs, 2012; Eriksson and Kovalainen, 2016). During the analysis process, this approach allowed me to move from detailed descriptions to broader categories and concepts that emphasize understanding or explanation of the phenomenon. This method is commonly recommended for exploratory studies such as this one, where established theory is limited and new theoretical hypotheses and explanations are developed based on the research findings (O'Reilly et al., 2012).

I began the analytical process by familiarizing myself with the data. This involved reviewing the transcriptions of each interview multiple times to achieve a thorough understanding of the material obtained. The next step was to begin with systematic coding to identify relevant and meaningful segments, particularly in relation to the research questions. I generated initial themes based on the patterns I observed and developed them further to address the research questions and provide greater insight into the chosen main themes.

The first key theme I identified centres on both **current and future professional development in Customer Success** (Table 6). The first subcategory under this theme offers critical insight into the essential skills required for success in this profession, while the second examines how evolving trends and phenomena are shaping the developmental needs of professionals in the field. The third subcategory analyses the significance that professionals place to their own professional development, and the fourth presents an overview of the existing methods utilized for professional development in Customer Success. Altogether, the findings from this first main theme help effectively address the first research question: *“What needs do Customer Success professionals have regarding their professional development, and how do they pursue it?”*

Table 6. Themes identified from thematic analysis.

Theme	Subthemes	Addressed research question
Current and future professional development in Customer Success	<ul style="list-style-type: none"> • Multiskilled professionals • AI and other trends shaping needs • Significance of professional development • Informal learning as a dominating method 	1. What needs do Customer Success professionals have regarding their professional development, and how do they pursue it?

Theme	Subthemes	Addressed research question
Developing professionally through a Customer Success community	<ul style="list-style-type: none"> • Finding connection in an isolated profession • Accessing exclusive knowledge • Receiving peer support • Having opportunities for career development • Growing professional confidence and building identity 	2. How do professionals perceive the role of a Customer Success community in their professional development?

Collectively, the findings from the first main theme establish the foundation for the second main theme, which explores **the role of a community in professional development**, highlighting the unique value and various levels of support it offers its members. This theme emerged as both the largest and most significant in relation to the overall research objective. Interviewees shared numerous examples and stories about the support they received from the community, which resulted in various outcomes: growing their professional confidence and building a collective identity of the profession, receiving peer support, building connections and knowledge within the community, having improved access to career opportunities and job prospects and gaining support in navigating the diverse field of Customer Success. Ultimately, the findings from this theme helped me to answer the second research question: *“How do professionals perceive the role of a Customer Success community in their professional development?”*

These two themes constitute the principal findings of this research and are each further presented and discussed in more detail in chapter four; Results.

3.5 Truth value and research ethics

When assessing the truth value of qualitative research, it is essential to identify the researcher’s role as a central instrument in the study. The natural subjectivity of the researcher cannot be overlooked; therefore, ongoing and active reflexivity is necessary to enhance objectivity within the research process (Eskola & Suoranta, 1998). In this research, due to my insider role with the community, maintaining truthfulness and credibility required particular attention to objectivity during both the interview and analysis phases. I needed to acknowledge my possible bias and utilize reflexivity to understand how my background in connection with the community might affect on my conceptions and interpretations of the study, as suggested by Gibbs (2012) as well as Eriksson and Kovalainen (2016). I paid continuous and systematic attention to how my personal experiences and opinions influenced my thinking and analysis, and I aimed to provide a clear account of how conclusions and explanations were arrived at. I also took deliberate measures to formulate the interview questions as

neutrally as possible. For instance, I reviewed the interview framework with three external individuals and conducted a pilot interview focused on ensuring impartiality. I believe my efforts were effective, as evidenced by the emergence of unexpected findings during data analysis, indicating that the research remained receptive to new insights and objectively interpreted participants' lived experiences, thereby supporting its credibility.

The credibility of the study is further strengthened by the length of the interviews and the repetition of similar questions, which enabled verification of participants' responses for consistency, and by purposeful sampling, which ensured conceptual density. The analysis ultimately achieved theoretical saturation as recurring themes consistently emerged, indicating that the categories had been thoroughly developed and that additional interviews would have been unlikely to reveal new insights (Eriksson and Kovalainen, 2016; O'Reilly et al., 2012).

Transferability is another key factor in establishing truth value, as it enhances the broader relevance and credibility of a study. Achieving transferability requires thorough and detailed explanations about the research process (Eskola and Suoranta, 1998). In this methodology chapter, I accomplish this by offering comprehensive information about the case organization, interview method, and the interview framework (Appendix 1). While the research framework was developed for a Customer Success community study, it was intentionally structured to be adaptable to other types of professional development community research, ensuring its suitability for various environments and scenarios. As a result, readers can apply the findings from this study to different contexts, which strengthens the transferability of my research.

A key ethical concern in this research relates back to my position as an insider within the community. Since I had previously met some interviewees through this group, pre-existing relationships and loyalties posed potential risks of bias or conflicts of interest in my interpretations. While qualitative research often aims to reduce the distance between researcher and participant to foster trust, this closeness required me to actively reflect on how it might impact my objectivity and whether participants might feel exploited (Eriksson and Kovalainen, 2016). Ethical reporting also demands presenting a balanced perspective, including negative or conflicting cases that challenge my key findings rather than selectively highlighting data that supports my own viewpoint (Braun and Clarke, 2022; Gibbs, 2012). Maintaining this awareness was essential throughout the research process.

Additional ethical considerations involved ensuring information transparency, avoiding coercion, and upholding participants' right to withdraw from the study at any time (Eriksson and Kovalainen,

2016; Gibbs, 2012). From the outset, I prioritised maximum transparency by providing prospective participants with a comprehensive research information sheet and consent form. Participants were clearly informed that their involvement was entirely voluntary and that they could withdraw consent at any stage of the study without penalty.

During the research process, it was essential to employ anonymization techniques to safeguard participant identities, thereby enabling open and honest responses, even regarding less favourable outcomes (Eriksson and Kovalainen, 2016; Gibbs, 2012). Because the case organisation was identified within the study, there existed a potential risk related to rich data disclosure; participants were recognised as community members, and details such as their titles, years of experience, and duration of membership were captured during data collection. However, no further identifying information about their respective organisations or specific fields of work was disclosed, thereby reinforcing anonymity. Given the community's large membership (over 1100 individuals), it would be challenging for external parties to determine which members participated in the research.

Maintaining anonymity was particularly important due to the sensitive nature of some topics, including workplace challenges, in order to minimize any risk of harm to participants (Gibbs, 2012). While the community founder – who assisted in identifying potential candidates – might have an informed perspective on possible participants, the initial candidate pool numbered several dozen, from which only eight individuals ultimately took part. This ensured that even the founder could not definitively identify the research participants.

4 Results

4.1 Current and future professional development in Customer Success

To understand the role of the community in professional development of Customer Success professionals, it was necessary to first gain an understanding of the current state of the profession, identify key development needs, and examine currently utilized methods to professional development within the field. The findings showed that even though the field is relatively new, there are distinct requirements and trends shaping these professionals' needs, which influence their development paths. The following subchapters will provide an in-depth analysis of each dimension, presenting comprehensive insights from members of the community.

4.1.1 Multiskilled professionals

One of the first initial categories and recurring patterns I identified from the interviews concerned the essential skill set required for Customer Success professionals. Despite the field's complexity and variation across organizations, industries, and engagement models, participants consistently highlighted a set of universal skills deemed critical to succeed in this role. Foremost among these was proficiency in **communication, active listening, customer understanding, and other social skills** necessary to establish strong, long-term relationships with customers. Many interviewees particularly emphasized the importance of asking insightful questions and being attuned to unspoken concerns, thereby creating an environment where customers feel comfortable expressing issues that may not have been directly articulated.

“There's the critical skill of customer engagement, which involves communication, empathy, and the ability to listen, and also the ability to ask questions. From my experience, I've noticed that customers can sometimes be very reticent and might not immediately open up or share details. Therefore, it's important to have the skill to gently extract the desired information from the customer.” (Member E)

Member B further elaborated on the significance of soft skills, particularly the importance of attentiveness to customers' needs and situational awareness. They explained that solely advancing one's own agenda may overlook significant concerns not explicitly stated by the customer; thus, effective listening is crucial to ensure all relevant matters are addressed:

“Being a good listener is very important. Giving air to the customer to express their needs which sometimes can be hidden or they might be miscommunicated. So not running through like ‘*This is my onboarding plan, I have one hour, I need to check, check, check*’ – but knowing where to stop for a moment, where to kind of be a great listener, but also knowing how to ask questions that would help customer open up and share something that is not on the surface.” (Member B)

Member D noted that customers often have demanding schedules, and if one is unable to communicate their message effectively, it is unlikely to capture their attention. This, in turn, may influence overall performance in the role of Customer Success Manager:

"Good communication skills [are important]... because people are really busy; they won't listen if you explain things at length, if you communicate for example by email in a very long or poor way, or if you cannot convey a product's value so that everyone understands it. So those general communication skills are critical." (Member D)

Another category of skill set highlighted by the participants was related to **effective organization**, proactivity, the ability to manage multiple responsibilities simultaneously, and strong project management skills, including personal time management for optimal productivity. For instance, many participants recounted scenarios in which they managed both their own schedules and those of customers, ensuring that customers progressed according to plan while maintaining control over their own, individual workloads. Staying calm under pressure was seen as essential for these professionals, even when facing numerous demands. Member C explained this as consistently delivering high performance in tough circumstances and focusing on the strategically most important tasks despite many distractions:

"Keeping a cool head is important, especially in stressful situations, so that you can still think clearly when stressed... From my perspective, the most effective or successful Customer Success Managers are those who can keep their heads above water, even when it feels like there's a lot going on. They manage to focus on their goals and strategic objectives, not just on the immediate crises." (Member C)

Member D further explained that it's important to know when to say no and delegate certain responsibilities back to customers to manage time effectively. They added that prioritizing customers according to the revenue they bring to your company can help you determine which customers should receive more attention. This kind of effective organization was identified as a crucial skill for Customer Success Managers to succeed in their roles:

"You also must be tough in a way, so that you don't use your time badly. If you sympathize with all your customers and they keep asking you for help and you always give it because you get this feeling, *'Well our product isn't working exactly like they want, I have to help'* and *'I have to write two sets of instructions'* and *'I'll go to this meeting to help'*, then you're using your time really poorly. Sometimes you just have to be able to... say no to that customer... and remember that you're not employed by your customer. Of course you probably need to make them happy up to a certain point, but not too much, especially you need to look at whether they pay us a 1000 a month or 10 000 – and then you can maybe prioritize your own time better." (Member D)

Member B also offered a perspective on organizational skills, noting that proactively managing tasks and demonstrating robust project management abilities empower Customer Success Managers

to help clients remain on track and accomplish their objectives. This is closely tied to effective communication skills, as professionals must clearly articulate the importance of key steps throughout the customer onboarding process:

“Then for sure being like a self-starter, self-managing person because there is a lot of project management... Making sure that customer is on time, they don't miss their milestones, that they actually do things as agreed and they understand why they're supposed to do it... Being able to talk to the customer from the perspective of value, of the goals they are aiming to achieve. Not just like ‘*You have to do it by 3rd of December*’, but like, ‘*Our aim is to train 60% of your team – so that we are on time with that project, we need to do XYZ by December 3rd.*’” (Member B)

The third and final category of critical skills focused on **understanding the customer’s business and industry**, rather than simply knowing the product and being able to assist with it. A few participants emphasized this also as one of the most important areas for their own professional development, expressing a desire to dedicate significantly more time to it than their current resources allow. They viewed this knowledge as essential for excelling as a Customer Success Manager, noting that being able to track shifts in the customer’s business is crucial for effectively supporting customers in achieving success with the products or services offered. One participant even remarked that only a small group of Customer Success Managers currently possess this expertise, describing those with such knowledge as the top performers in the field:

“The ones who are really on the top, they are actually getting into the next level. They are trying to understand what the customer’s business is, how is the business changing and how is my product helping or adapting to that change. Because if you don't adapt to that change – then ultimately, you're looking at churn at some point, because the customer will say ‘*My process has completely changed*.’” (Member G)

Member C highlighted that gaining insight into the customer’s business helps you grasp their broader strategic objectives and assess how your company’s product fits with these aims. They referred to this as seeing past everyday tasks, stressing the importance of comprehending the customer’s needs and goals in a deeper way – not only knowing about your product:

“One needs to have an interest in understanding both the product and the business context – what your customers' goals might be. You must be able to look beyond day-to-day operations to identify their objectives and how those objectives can be supported. In other words, it is about understanding the customer's goals and flexibly aligning them with any new developments related to your product.” (Member C)

However, it is important to note that possessing such knowledge may become even increasingly challenging when the employer’s customers' profiles span more than one industry. Managing clients from diverse sectors increases the complexity of the Customer Success Manager's role, requiring familiarity with multiple industries and an understanding of their respective trends. For instance, Member F identified their professional development needs as largely focused on building industry

expertise, given that their portfolio includes clients ranging from chocolate manufacturers to fertilizer producers:

“Getting more information about the industry in general and their specific industries, because there are a bunch them. One company makes chocolate, and another makes fertilizers for soil. These are two different businesses – and I need to be able to talk to each of those.” (Member F)

Based on the results, it’s evident that today's Customer Success roles demand professionals with a wide range of skills. The core skills of a Customer Success professional in this research were primarily associated with interpersonal and organizational abilities, along with industry-specific knowledge of the customer’s sector. These competencies – particularly soft skills – were often regarded as qualities that cannot be fully acquired through academic study but are instead developed through real-world work experience. Many participants also believed that these abilities are frequently transferable from various sectors and industries, making Customer Success an accessible and appealing field for career shifters – a background shared by many of the participants themselves as well.

4.1.2 AI and other trends shaping needs

During discussions with participants, many identified industry shifts, changes, and emerging trends as key factors in directing their professional development. This observation formed the basis for this second subtheme within the broader topic of current and future professional development, as it was evident that participants were proactively aligning their efforts with the evolving trends impacting their respective industries and organizations. **Artificial Intelligence (AI)** was most commonly cited as a tool for scaling operations and enhancing efficiency, prompting professionals to prioritize learning more about the topic. A few participants noted their active use of AI in their work already and highlighted its growing significance, suggesting that AI will increasingly replace entire functions. For instance, Member D demonstrated this by having already created an AI bot that delivers instant, high-quality support to customers, freeing up their time to focus on other tasks and thereby increasing their efficiency:

"I have personally extensively used of AI in my work, having outsourced a large part of our support to AI. I have trained an AI bot that responds very effectively to complex technical questions, so it has been a significant help to me personally and, therefore, to our customers because they receive immediate responses... as the bot handles the inquiries very well." (Member D)

Member B identified AI as a key need for professional development, anticipating significant disruption within Customer Success. They emphasized the importance of gaining both theoretical

knowledge and practical experience with AI by continually experimenting to determine how it can optimize processes:

“How now technology changes with AI, it's a massive change... it's already disrupting quite heavily technical support, it will definitely disrupt Customer Success, the way how we onboard customers, how we do proactive outreach towards them. So, it's very crucial to be on top of it. But not just like on the theoretical level, but also like getting into that, testing out what fits our company, what fits our processes and are we ready for that.” (Member B)

Another similar recurring theme in general among participants was the desire to improve their work in general by **increasing efficiency**, scaling up operations and using technical solutions to streamline existing processes and manual tasks within their companies. For instance, Member H identified this as a key need for their professional development, noting that automating repetitive tasks with technology would free up time for more valuable work:

“Customer Success is inherently proactive, but how can we further increase this proactivity? How can we enhance our output by streamlining various processes and by daring to automate more aggressively?... We should be moving in a direction where we automate repetitive tasks that don't actually take anything away from the customer; on the contrary, they enable us to accomplish more. So, optimizing one's work is an area I believe affects everyone, but it is undoubtedly a field where there is room for growth.” (Member H)

Member B expanded on this point by sharing that they frequently encounter manual tasks in their work and are always looking for ways to enhance efficiency through automation to use their time more effectively, which they suggested to be a common challenge in the field:

“In Customer Success there are so many other things we are not yet doing well, in my opinion... improving processes and getting rid of manual work. I think lots of us have routines which we do again and again... at least I always think; why do I have to do that manually?” (Member B)

However, in response to these growing needs related to AI and efficiency, professionals also predicted that **personality and a personal touch** would become even more important in Customer Success than before. As automation, agents, and AI continue to advance, people are less likely to take human interaction for granted – instead, it will be seen as a valuable asset for businesses, almost serving as a competitive advantage. Many will prefer speaking with a real person rather than an AI bot. For instance, Member B believed that even though AI will greatly improve in the future, the human element will remain distinctive and appealing, and offered as a unique benefit:

“I think that this [AI] trend will bring another trend, which is a human aspect because once we talk about technology on one hand, then having the service with a real human will be valued in a different way in the future... we will go all the way with AI, automate as much as we can, and then the human consultant hours will become a luxury product... we have these tools which are optimized, scalable and all AI and they're

amazing – but then we have those customers who maybe want this personal service. So how will that be priced, and how will it be packaged.” (Member B)

Member G strengthened the perspective of personal touch by noting that as remote meetings have become standard practice, in-person meetings now offer distinct value. When used effectively, these face-to-face interactions can be especially useful for building strong customer relationships:

“I still believe personal interaction is an advantage. Even with AI and other technologies, personal contact can help you stand out... And since remote meetings have increased a lot – back in the day we often visited clients at their offices or hosted them in ours – but nowadays so many nuances drop away because you're not physically interacting. So, if you can somehow make use of that and it's your own strength, the personal and social interaction... then you can achieve considerably more.” (Member H)

Finally, participants also highlighted a notable shift within Customer Success: the role is increasingly evolving into a **strategic, consultative position**, with greater emphasis on sales and account growth rather than solely ensuring client satisfaction or helping with product issues. This development connects to the essential skills for Customer Success Managers; understanding the customer’s business is becoming increasingly important for advancing as a professional in the field. Member G recommended recruiting more professionals from departments such as account management and sales in order to drive growth, particularly given the current landscape shaped by constant change, AI and automation:

“We are hitting the ceiling with what a CSM (Customer Success Manager) is. I think we need to go beyond that. So, we need to get people from account management, real salespeople who have done enterprise deals... with AI a lot of things that were relevant before are not relevant anymore. So, what is the difference that you can make. It's understanding the business case... how can a CSM be strategic, how can they be more like a key account manager, how can they focus more on delivering of the value, how can they understand the business of the customer... I think those are the problems of the future.” (Member G)

Member also A noted that recent job postings they have seen for Customer Success Managers indicate a transition in the role toward a more consultative approach, emphasizing the delivery of outcomes and providing expert services rather than focusing solely on supporting software adoption:

“I've seen quite a lot recently that the position of the Customer Success Manager being advertised [in job postings] often targets situations where the customer does not actually use the software, even though the company positions it as a SaaS offering. What they're really selling are the outcomes... The concept [of CS] has expanded so that there are perhaps more consulting services being sold with monthly-subscription pricing, which includes the software as well as the expertise [of the CSM].” (Member A)

In summary, the primary trend currently transforming the industry is the adoption of AI, which however is predicted to also serve as a catalyst for the emergence of additional trends – such as the desire for human element. All participants widely acknowledged the rapid pace of change and recognized that adapting to these shifts is central to their professional development. And while most participants articulated also other specific needs and areas for improvement within their field, it is clear they are and will be largely guided by both existing and emerging trends that impact their organizations.

4.1.3 Significance of professional development

Another recurring pattern in conversations about professional development was that participants considered it **highly important** and they all shared a strong **intrinsic motivation** for self-development in general. Every participant regarded professional development as essential for remaining up to date in Customer Success or any other field. Many highlighted its crucial role, especially given the rapid changes of today's world and – once again – the growing impact of AI, as noted by Member H:

“I see it as vital to always be ahead of the curve, proactively aware of the latest trends, and to anticipate where the market is headed. Identifying the sectors where we can provide better service to our customers is crucial – especially now with AI, which can further enhance our efficiency.” (Member H)

Member H also emphasized that although they are constantly learning on the job, it isn't sufficient to rely solely on workplace experiences for professional development. They believed it's important to intentionally set aside time for development and deliberate practice, allowing space for active reflection and improved performance:

“Professional development is incredibly important, and there must be ample time allocated for it. Of course, you learn a lot by doing – being in constant contact with customers and engaging in discussions teaches you immensely. However, you also need to carve out space for learning on the side, so that you can step back and view things from a broader perspective. This allows you to manage and adapt your work role more effectively.” (Member H)

Member D also discussed the topic, referencing AI once more and connecting it to the essential skill of knowing your customer's business and industry. Lacking awareness of new trends can leave you unprepared for major changes – because disruptions affecting your customers will eventually influence your company's business as well:

"It's extremely important, just as important as in any other field, because everything changes all the time – whether it's AI or something else that greatly impacts how people work, how they can be more efficient, and how they handle changes that are happening globally. Such changes might affect individual CSM to the extent that they need to

understand, for instance, that our clients in the construction sector may not be doing well. Therefore, they need to have a broad understanding of the business landscape and engage in professional development... it's like being part of the global race." (Member D)

Member B emphasised the significance of the current era by noting that, unlike previous generations who could specialise in one field and remain up to date throughout their careers, this is no longer feasible. Even in the absence of AI, the **rapid pace of global change** demands continuous improvement. As a result, the importance of ongoing professional development cannot be overstated:

"The era we are living now, even without AI, it's constantly evolving... Our parents maybe could have had a profession, and they would live on that. It doesn't apply anymore for us. Keeping yourself up to date to what happens, trying new methods, new processes, seeing like what can be improved, what can be done better – I think it's important for every team member." (Member B)

Nature of **Customer Success as a field itself** was also identified as an important factor driving the need for ongoing professional development, because Customer Success often operates in fields where rapid change is the norm – like the software industry. Member C emphasized that this environment demands mental resilience, as coping with ongoing changes can be exhausting and staying current requires continual learning and effort:

"It's very difficult to stay current if you don't develop your skills or keep up with the industry where your product might be involved. You need to stay updated on industry news, but also on technological advancements. You must continually develop yourself and learn new things. I would say that Customer Success often operates in fields where there are frequent changes over short periods, which also requires mental resilience to continuously handle these changes. So, in this field, it is indeed mandatory." (Member C)

Member A highlighted the significance of professional development by noting that failing to pursue such growth can result in harmful consequences both for the individual and the organization, potentially causing one to fall behind competitively:

"It's essential because customers are evolving too, and if you are only doing repetitive tasks within a specific box, you will inevitably fall behind. Ultimately, this leads to a loss of trust, and you might not be able to effectively convey or even ask relevant questions or communicate customer needs to the product organization, which helps keep the company relevant. The concept of product-market fit arises from innovation in the field and the entrance of new players. If you're not interested in anything, then you're bound to fall behind." (Member A)

Generally, Customer Success professionals regarded professional development as a crucial component for maintaining expertise within their field, as it directly influences their effectiveness, the quality of their customer relationships, and the overall development of their careers. With the

landscape of Customer Success continually shaped by global trends and evolving industry dynamics, professionals must consistently seek new learning opportunities and engage in skill-building activities to remain competitive.

4.1.4 Informal learning as a dominating method

When exploring how Customer Success professionals pursue their professional development, it became evident that **informal learning methods** dominate. Many participants shared that they constantly seek to educate themselves – not just about Customer Success, but also about developments in their customers' industries and broader business trends. Regular activities included listening to podcasts and audiobooks, watching webinars, reading books, blogs and articles, and following thought leaders and influencers on LinkedIn. For instance, Member G highlighted LinkedIn as an efficient way to stay informed:

“I think reading books has never gone out of style. Podcast is another good example. And then I feel that LinkedIn posts are... I mean, following the right people in your industry is one of the best ways to understand what is happening, getting the pulse where is the industry moving. So, I keep my knowledge updated by those means.”
(Member G)

Interestingly, a few participants also mentioned a company-level practice of watching recordings of colleagues' customer meetings to exchange feedback and learn from each other's approaches. Member B explained they even have a regular pairing rotation to keep feedback varied and ensure these sessions happen consistently:

“For instance, we have peer-to-peer learning... we watch each other's calls... we change it every quarter, who is with whom and then they watch each other's recordings, and then they give feedback how to be better and what they do. And I think that that is very useful.” (Member B)

The value of on-the-job learning was also highlighted repeatedly, and **leveraging workplace knowledge** identified as one of the most effective approaches, even across various departments. For example, Member G noted that they frequently seek expertise within the organisation by inquiring about what colleagues can share with them:

“I personally try to find out what people in my company can teach me more about a particular topic... I would pose a question to them just to get a different angle. I may know the answer, but there is maybe a different angle, so I think we should be open to different sides on a single problem... I think that is one of the best ways to learn; to get different perspectives.” (Member G)

Several participants also specifically named **Customer Success Nordics community** as one of their primary methods for their professional development, noting that attending their events is both convenient and valuable. Many highlighted the importance of leveraging networks built within this

community to support their ongoing professional development. Occasional lunches and meetings with fellow community members were commonly mentioned, and Member B specifically shared that they have established routine calls with another participant to exchange insights, learn collaboratively, and brainstorm together on a continual basis:

“I have a friend now with whom we have regular calls, and we just brainstorm ideas with each other about whatever topics, which is great to have it like on a regular basis. We were connected [through the community] ... and now it's been almost a year. I think it's super useful... You just have like 30 minutes once a month or once every two months and then you just like chat about specific like leadership, or AI tools or anything else like HubSpot or reporting... And that's super cool.” (Member B)

Member D stated that the community is currently their main source for ongoing professional development, noting that the convenience of scheduled events enables them to allocate time for development opportunities despite their busy work schedule. Additionally, they mentioned occasionally having lunches with professionals they've connected with through the community, which further illustrates that the community serves as their primary method for professional development:

“[Customer Success Nordics events] are probably my number one [method for professional development]. It would be really great if I could use, say, an hour a week to try to develop myself more purposefully in Customer Success, but unfortunately that's not possible right now because of a lack of time... The event is always at a set time in the calendar [which makes it more convenient]. Other methods I use are conversations with other CS people. Sometimes I'll go to lunch [with professionals met through the community] and stuff like that – so those occur most often.” (Member D)

While several participants referenced also other communities they have engaged with for professional development and regarded communities in general as a routine part of their development, many identified Customer Success Nordics as an exceptional community that **addresses their specific needs effectively** through its domain-specific focus on Customer Success. It provides access to specialized knowledge relevant to their field, which may not be available in broader or less targeted communities. For instance, Member C noted their involvement in another local, tech-focused community; however, due to the presence of members from various technical roles, they felt less connected there than they do within the Customer Success Nordics community:

"Compared to [the other community] events, not everyone there knows what a Customer Success Manager is. Sometimes you question whether you're in the right place because the event seems aimed only at engineers – though that's not true. That feeling definitely doesn't occur at Customer Success Nordics' events." (Member C)

Overall, informal learning approaches emerged as the predominant style among Customer Success professionals to develop themselves professionally, constituting the majority of development activities cited and forming a consistent part of weekly and monthly practices. Formal learning

methods such as online courses, conferences, workshops and learning platforms were also mentioned occasionally, but these offerings were typically viewed as more isolated, one-off training opportunities rather than integral components of ongoing professional development.

4.2 Developing professionally through a Customer Success community

Interviews with participants revealed a strong appreciation towards the benefits and value provided by the Customer Success Nordics community, which emerged as the second and most prominent theme in the research. Many participants recognized that the advantages offered by the community are multifaceted, providing support in various ways. The following subchapters will examine each aspect of this support in detail, presenting comprehensive accounts of the experiences shared by community members.

4.2.1 Finding connection in an isolated profession

A notable pattern from the interviews was related to Customer Success being seen as **a distinct and evolving field**, prompting these professionals to continually pursue various ways of professional development. Many participants noted that, because the field is still so fresh and evolving, traditional resources like books are limited, leading them to turn to the Customer Success Nordics community for support. Member D explained that they sought help from this community because Customer Success is neither a well-established concept nor it is something that even can be approached in a single, uniform way. The strategies always depend greatly on factors such as the organization, the product, the nature of the customers and their number. For this reason, having a supportive community to consult for alternative approaches and connect with peers was seen as invaluable, driving their ongoing engagement with the Customer Success Nordics community:

“Sales has been around for a long time and has certain established principles. But I feel Customer Success is still quite new. Also, what Customer Success actually does is very company-dependent: it’s a broad concept and a very new concept. So things like books or podcasts can be a bit hard to find, and that’s exactly why communities like [Customer Success Nordics] are useful – places where the discussion doesn’t have to be published, it just happens continuously among like-minded people.” (Member D)

Interestingly, some participants observed that the role of a Customer Success professional can also be somewhat **isolating**. Despite having a team, individuals often feel solely responsible for their duties. Therefore many emphasized the value of connecting with peers outside their own organizations who share similar roles, as reflected in Member C's perspective:

“This job can often feel like something you do alone. Even if you have a team in your company, you have your own customers. Although you may collaborate in workshops

and sometimes accounts may change hands, it still feels like you're individually responsible. Therefore, it's important to talk with others who may not necessarily work in the same company, to obtain that peer support as well." (Member C)

Member D reported a similar experience, explaining that they are currently the sole individual holding a Customer Success title within their organization. **The absence of colleagues** in equivalent roles has made them particularly appreciative of the support provided by the Customer Success Nordics community and **the opportunity to connect** with more senior Customer Success professionals. Member D cited this as a principal reason for their active participation in the Customer Success Nordics community, explaining that without such engagement, they would likely be confined to limited perspectives and repetitive ideas:

"I work alone... while I do have a boss with whom I discuss things, essentially, this is my responsibility, and I manage everything on my own. If I didn't engage in the community events... I would somehow feel probably very stuck in my own head. Because I wouldn't be receiving new ideas, and things at our company probably wouldn't progress, as I'd just have the same small ideas circulating in my head with no way to break free from them." (Member D)

Another somewhat comparable experience involved Member E, who had joined the community almost instantly after landing their first Customer Success role. Years later, when they were promoted to their current leadership position within Customer Success – one that hadn't existed before in their company – they described the difficulty of defining this new position and determining best practices due to the lack of an established framework to follow. Throughout this transition, the Customer Success Nordics community served as one of their essential resources for development, providing valuable insights and strategies. By drawing on the collective expertise of the community, Member E was able to successfully navigate the demands of their new role:

"This role didn't exist in our organization before... there's no predefined model that I can refer to on how it should be implemented, posing a challenge that requires me to learn and carve my own path... I try to pick up pieces from various sources and integrate them into my role to see what works, for instance through Customer Success Nordics – there I receive valuable tips, and I have the chance to exchange ideas with others." (Member E)

In addition to valuing the sense of shared experience fostered by the community, participants expressed strong appreciation for the opportunities to broaden their **professional networks**. They considered connecting with fellow professionals through the community as a significant benefit that could enhance their professional development. Many viewed the relationships built within the community as **an extended group of colleagues**, available for consultation or assistance whenever needed. For instance, Member G explained that while it's easy to seek help within their own company, having access to a network of other Customer Success leaders is invaluable because such

specialized expertise isn't present for them internally. They described that the community has made reaching out to new contacts effortless:

“In my company I have CSMs and then of course there is my CRO, but I don't think they all understand the same problems that other Customer Success leaders understand because we are in this field. So that's why I have this extended network... You know, I can just reach out to anyone whom I may have met once, just message on LinkedIn ‘*Hey, can I pick your brains for 15 minutes?*’ ... That's something I think that differentiates this community... they [community members] are very helping and approachable.” (Member G)

Member F reinforced **the value of networking and connections** by recounting an experience where a casual lunch with another community member had led to a productive exchange about different implementations of customer onboarding, which later became relevant within their organization. Member F said they may still reconnect with this individual to further benefit from their insights, demonstrating how professional connections created through the community can provide lasting value in multiple ways and support these individuals in their professional development:

“For instance, there was one person... we had casual lunch with him and he shared a lot of information about how Customer Success organization is structured in their company, that for instance they have a separate onboarding team... this is something that we're also considering now in our company as well and I know that if we decide to take it further, then probably I will have one more discussion with that particular person on the topic asking ‘*How did you do it?*’” (Member F)

In summary, the demand for professional development in the Customer Success community stems from the field's distinct nature. Since these roles can feel isolated, or even lonely at times and there is no universal methodology applicable across all organizations, professionals are required to identify and implement effective Customer Success strategies tailored to their specific contexts. With Customer Success being a fairly new and constantly evolving field, many rely on networks like Customer Success Nordics for support that provide valuable opportunities to connect with like-minded professionals and exchange ideas and solutions, helping individuals further develop their professional expertise.

4.2.2 Accessing exclusive knowledge

A major key benefit that I identified was the community's function as a forum for professionals **to share best practices** and **benchmark** their organizations against peers. Participants valued the opportunity to gain insights beyond their own companies, learning about the approaches, strategies, methodologies, and practices employed by others in Customer Success. Member A mentioned frequently noticing common challenges across organizations; hearing how others tackled these

same issues helped them determine if similar solutions could be applied internally. This process also allowed them to reflect on their organization's progress – considering whether they were trailing behind or pioneering advancements within the Customer Success sector:

"I've gained inspiration or had that aha-moments thinking, *'They've solved it that way'*, and *'I recognize those issues'*. In a certain sense, it has perhaps provided a deeper understanding of my own organization... learning how others are doing things and how their organizations operate. This gives me some benchmarks to determine the level my own company is at and then gather ideas that I might implement in my own organization." (Member A)

Member H shared a similar story, noting that working within your own organization can make you feel like you're the only one handling Customer Success in a particular way. However, joining the wider community reveals many professionals doing just what you are – and offers the exciting chance to learn new, even more effective approaches:

"You're surrounded by like-minded individuals who have similar or nearly similar job roles. From them, you can widely gather knowledge from various fields, and it's helpful for benchmarking how others work, reflecting on whether you're doing things correctly yourself. It's eye-opening to realize, *'Okay, I thought I was the only one who did it this way, but it turns out many others do too'* or *'Wow, that approach someone else is using is brilliant, I should adopt that too'*." (Member H)

Member D explained that they actively take notes at every event to help them remember recommended best practices and apply these insights in their own organization. According to them, these practices can range from minor adjustments to major strategic changes; the most important aspect is learning from others who have achieved what you may still be aiming for:

"When I attend those events and engage in group discussions or listen to someone else's presentations, I write down key points into my notes. Many of these insights have actually been implemented, allowing me to make direct changes based on what I've learned. These could be small tweaks, like changing a question in the onboarding form, or even bigger strategic changes. Essentially, these are concrete ideas from other people who have managed to do something better than I have." (Member D)

With many participants holding leadership positions in Customer Success, benchmarking and identifying best practices were recognized also as core benefits from management perspective.

Member C described how the most recent leadership event had proved particularly valuable due to its timely focus on reward systems in Customer Success; gaining insights into effective and ineffective approaches shared by fellow leaders offered them significant practical value:

"The last event I attended was particularly relevant. It focused strongly on how to lead and motivate, potentially financially and in other ways, which was spot-on because these topics are currently very relevant for us... The discussion was extremely interesting, especially hearing about how others have implemented such strategies and what might have gone wrong. So yes, especially in the area of team management, when

the topics concentrate on how to get the entire team to operate in accordance with the company's interests, I find it incredibly fascinating right now." (Member C)

What participants particularly also appreciated was the opportunity to learn about Customer Success best practices through **real-world examples**. Member H identified this as a unique strength of the Customer Success Nordics community, noting its effectiveness in providing opportunities for members to ask follow-up questions and engage in collective reflection on specific, practical cases:

“What really stands out and is done very well, is the fact that there are real cases being shared. People share their own experiences, problem and solution scenarios they've encountered in specific situations. Facing real challenges and then discussing how they were actually resolved is hugely beneficial. We bounce ideas off each other and find points of connection, like *'Okay, yes, I've been in a similar situation'*, and from there, we derive coping mechanisms and strategies for handling various scenarios.” (Member H)

Member B expanded on this point, noting that, in comparison to other forms of professional development, participating in a community that shares real-world examples offers **a distinct perspective**, that cannot be found elsewhere. They explained they had completed an online Customer Success course where there were some practical scenarios included in the materials, but the examples were rather brief and typically taken from large corporations in the U.S., which made them appear as too distant and difficult to fully grasp due to the inability to seek further clarification:

“Usually, they [online courses] would have some use cases, but you know it's like one chapter of a company which is somewhere in the U.S. and you're like *'OK, what do I do with that?'* Here [in the community] are real people, with real use cases, where I can dive deep and say, *'So exactly what did you do? How do you do that? How do you segment your customers?'* I think that is super valuable, something that you can't get anywhere else.” (Member B)

Member D emphasized this point further by noting that, even though they frequently engage with a global Slack community focused on Customer Success, they felt it as challenging to extract practical insights from there, because discussions often remain abstract or they lack relevant local examples. In contrast, connecting with a physical community allows for **face-to-face discussions** about cases that feel much closer to home:

"It feels like the ideas and suggestions I get from this community are more concrete and accessible, in ways that I can directly apply to my job to improve or innovate differently, compared to what I might gather from a podcast or a large online community. There, discussions often touch on higher-level topics, or it might feel like, *'Okay, this example comes from a huge American company, of course they can do it that way'*. In contrast, when you're interacting in a community with people who are

similar to you, or when you're face to face with real individuals, it feels more achievable.” (Member D)

Overall, participants identified several key benefits of their involvement and professional development through the community, including opportunities to learn about best practices and gain access to practical, local examples from other organizations. However, it is important to note that while many regarded the Customer Success Nordics community as providing unique advantages and superior support for professional development, participants still consistently emphasized that it serves as a complement to other informal and formal methods of development. Many reported actively engaging with multiple approaches alongside community participation to gather information from various sources.

4.2.3 Receiving peer support

When discussing the benefits and perceived value of the community, a key pattern emerging from the interviews was the strong focus on **peer support**. The community was widely seen as a safe environment where professionals could share their difficulties and receive advice from others facing similar situations. Many participants mentioned that before joining, they sometimes had felt isolated in dealing with challenges like managing multiple focus areas or handling oversized customer portfolios. However, after becoming members, they realized these issues were common, which helped ease their struggles simply through open discussion, even if no immediate solutions were available. Interviewee B even referred to the community as “*group therapy*”, highlighting its therapeutic environment where Customer Success professionals could discuss their work-related challenges and access support from peers who have faced comparable problems. These exchanges fostered a sense of mutual support among community members:

“I think meeting like-minded people who understand what you are doing, like what is actually CS and just like talking to them about that. That's like your group therapy. Seeing what challenges there are, and if they are the same, you're like, ‘*Oh, we are not the only one*’. And just meeting those people and hearing their stories.” (Member B)

Interviewee A provided a similar perspective on peer support, noting that while all companies face their challenges, generally these difficulties are rarely discussed externally due to typically filtered communication. However, within the Customer Success Nordics community, individuals feel more comfortable sharing their experiences and challenges more openly. They also explained that learning about challenges faced by other companies can help alleviate one’s own difficulties by offering broader context and perspective, highlighting that circumstances may not be as severe as initially perceived:

“You can just inquire about how things are done in that organization and perhaps receive more unfiltered data about what kinds of challenges and sentiments are present in different organizations, which can help alleviate some of your own frustrations in your organization. This comes from understanding that everywhere has its own set of problems. Essentially, it's like peer support that provides perspective that things could be worse or that every place has its own challenges. In a way it helps contextualize your own negative thoughts.” (Member A)

Member D highlighted again that as they are the sole worker currently in the Customer Success role in their organization, the community provides the feeling of relief and helps them **gain perspective** on how common some of the issues in the field are:

“I really get this relieved feeling, in the sense that others have these same problems too, especially since I do this alone... In the community, people precisely get what you're talking about. When someone mentions that they have a particular problem, then there's a realization, ‘*Okay, I know exactly what we're talking about, I'm not the only one who has things this way or who is dealing with this same issue*’. It's common with everyone [in CS]. Well, not everyone, but a majority of people.” (Member D)

The term “*peer support*” emerged as the most frequently mentioned concept across all participant interviews, highlighting its significance among the community benefits and value. Peer support holds notable emotional value, as sharing personal challenges can offer essential relief and serve as critical support mechanism for the professionals’ ongoing development.

4.2.4 Having opportunities for career development

During the interviews, many participants indicated that one of their primary motivations for joining a community like Customer Success Nordics was to **gain exposure to different companies**. Although currently employed, several participants identified this opportunity as one of their key drivers for initial involvement with the community. For instance, Member C shared that after relocating to Finland a few years ago, they intentionally sought out communities to connect with new companies and discovered Customer Success Nordics. Through this community, they were introduced to various new connections, which made **exploring job opportunities** easier. Ultimately, Member C received a promotion at their current company and chose to stay, but remained grateful for the chance to learn about local businesses while settling to life in Finland:

“I explored what kind of SaaS companies there are in Finland through the community. Before I received my promotion, I was slowly getting into job hunting mode because I thought my promotion might never come. At that time, I started mapping what companies could be interesting. This led me to learn about many of them, but I also had numerous contacts, so I could see if they had any job openings coming up, often through meeting people whose companies were posting openings on LinkedIn.” (Member C)

Member C also further explained that although they received the promotion, their ongoing involvement in the Customer Success Nordics community would continue to be driven by an interest in connecting with other professionals and organizations in Helsinki. They acknowledged that remaining with one employer throughout an entire career is unlikely, and building relationships within the community could lead to future opportunities:

“Through the community I'll be exposed to interesting companies and topics... I don't believe anyone stays at the same company for their entire working life, so it's important to keep doors open to new opportunities as well. I'm not necessarily saying that I'll get a new job through this, but I'll be exposed to people and opportunities that could, in the future, lead to searches, decisions, or choices that might open up new possibilities.”

(Member C)

Member F also shared a similar story on their journey of relocating to Finland and expressed curiosity about Finnish work culture and **the specific function of a Customer Success Manager** within local companies. They also noted that they were looking to broaden their network, which could enhance their employment prospects by connecting them with more people. To gain this kind of practical insight and discover potential job opportunities, they decided to join the community:

“The most pragmatic reason why I did visit [the community] was to expand my network and to expand number of people I know, because, well, I guess it's a common knowledge that in order to find a job in Finland, you need strong a network, because it typically helps quite a lot, so that was one of the reasons... Then getting to know people, what they're talking about... how work life in Finland looks like, how life of a Customer Success manager looks like. So, getting more information about the topic in general.” (Member F)

Another notable aspect highlighted by participants is the community's effectiveness in facilitating the acquisition of **insider knowledge about local companies**. For instance, Member A discussed how their interactions within the community had shaped their impressions of various companies based on the employees they encountered from those companies. For instance, meeting professionals who demonstrated strong competence would serve as an endorsement for the employing company in their eyes. They also noted that if they considered a job change in the future, they could utilize their connections in the community to help evaluate whether they were a cultural fit with a potential future employer:

“I see it as very important to get to know the people you might someday work with because it also provides a sense of what kind of people the company hires. For example, if someone seems utterly incompetent, I might not want to join that company because if they hired that person, it speaks to the level of work there. Conversely, if I respect someone and they work somewhere, that's a green flag to me. I can ask them what they think about the company and get some information on the cultural fit, like, ‘*Hey, would I fit in there?*’” (Member A)

Another recurring pattern that emerged from the interviews was the support provided by the community to **help members secure employment**. Although no one in this research reported landing a job directly through the community's networks, many participants noted that these connections could enhance their prospects if they ever found themselves job hunting again. For instance, as previously explained, Member F joined the community specifically to expand their network and increase their chances of finding work. After attending community events, they were able to connect with a mentor through the community's mentorship program. They recalled that a primary objective of the mentorship was to assist them in securing employment, particularly given the limited interview opportunities they had received prior to the mentorship. During this period, the participant eventually received an interview opportunity for a Customer Success Manager position, while their mentor continued to provide critical guidance and support to prepare for it. They described the mentorship experience as highly beneficial, especially in overcoming an imposter syndrome. As a result of this process, they were able to successfully secure the Customer Success Manager position they had been preparing for with their mentor. For Member F, the mentorship program provided by the community marked a critical milestone in their professional development, making a substantial positive impact in their career progression through empowerment:

“We trained for the interview... and I got rid of my imposter syndrome, because frankly speaking before that job interview process, I didn't have too many interviews, and before that I was on parental leave. And with such a combo, you start like doubting yourself and thinking that you are not worth it. And the problem is if you come to a job interview thinking that you are not worth it, interviewer will think the same, right? So, my mentor really helped me to get rid of that thinking... I got the feeling that I am worth it.” (Member F)

Another member, H, shared a similar experience of suddenly becoming unemployed and having to look for a job after nearly a decade without needing to do so. They described the process as unfamiliar, admitting they had forgotten what it was like to be a job seeker. With the job market being particularly challenging, H reached out to the Customer Success Nordics community, attended various events to build connections, and focused on professional development. They recalled one notable event organized by the community which focused on recruitment and job hunting. Recruiters were present there to review CVs and offer guidance. At this event, Member H met with recruiters and received valuable advice, especially regarding their CV. After making the recommended changes, Member H began receiving far more **invitations to job interviews** than before:

“There was an event with recruiters from various startups present, it was very much a hands-on experience where you could share your CV, and they went through it with you, giving tips on how minor tweaks could improve your it and increase your chances

of progressing to the interview stages... After that, I updated it with the improvements suggested, and it wasn't long before I started seeing noticeable results; I was receiving interview invitations significantly more frequently than before.” (Member H)

Examples from Members F and H strongly demonstrate how the community positively influences members' careers and professional development by offering support at various stages of job hunting. Additionally, several other participants, even those not currently seeking jobs, recognised the community's significant potential to assist them in possible future job searches. Being exposed to new companies and gaining new connections was a key factor in participants' professional development and community engagement, as it expanded access to job opportunities. Participants also pointed out other opportunities that motivated their involvement in the Customer Success Nordics community, including the ability for recruiting managers to identify emerging Customer Success talent. Collectively, these findings highlight the community's significant role in empowering job seekers and providing career development opportunities for its members.

4.2.5 Growing professional confidence and building identity

Another notable pattern from the interviews was the strengthening impact of the community on the **professionals' confidence**. Many participants mentioned that being part of the community regularly enhanced their professional confidence and provided affirmation of their skills, competence and professionalism. For example, Member C recalled a significant, eye-opening experience: while doubting their own expertise because of workplace challenges, they attended a community event and during a small group discussion shared their perspective on the day's topic. To their surprise, they received highly positive and encouraging responses from fellow members, which reminded them just how knowledgeable they are. It made them realize that the difficulties they had encountered were largely due to unique, workplace-specific factors, rather than any lack of capability or expertise:

“We had a small discussion group where the topic was actually something I had considerable experience with. At that point, the other participants at the table were like, *‘Wow, you have a lot of experience in this, can we have a call after this?’* It kind of hit me – I hadn't realized how much professional expertise I have to offer on this subject. This in itself boosted my confidence, which I may not have fully appreciated independently... it occurred during a time when I was questioning my own professional skills due to certain challenges at work. Stepping out of my workplace context, I realized that the challenge was just specific to my workplace.” (Member C)

Another participant, Member F, reported a comparable experience, noting that participation in the events provided valuable insights into their own level of expertise. Upon realizing that they were

already familiar with many of the topics and responsibilities discussed and possessed relevant skills, they described experiencing a boost in their professional confidence:

“There were a lot of meaningful talks on the one hand, but at the same time I got a little bit more confident about my skill set, because I was listening and thinking; OK, but this is something that I know, and this is something that I did, and this is something that I probably know how to how to do it – maybe even in a better way, so to say.” (Member F)

Meanwhile, Member D linked the benefit of strengthening professional confidence back to the element of peer support. They viewed discussing challenges with colleagues as a chance to compare perspectives, which helped increase their confidence. This process reassured them that making mistakes and having struggles is normal and doesn't automatically translate to them being inherently bad at their job:

“Peer support really fosters professional confidence. It happens when you realize that other people are dealing with the same things, and it allows you to see where you stand compared to them. This gives you a kind of reassurance that, *‘Okay, others are grappling with the same issues, they’ve also made similar mistakes’*... this interaction boosts my confidence because it reminds me that I'm not inadequate or performing poorly – these experiences are common to others as well.” (Member D)

Member E also shared that being part of the community has raised their professional confidence, enabling them to express themselves more freely and trust in their own ideas and suggestions at work. They believe that, because of these benefits, the community will continue to play a major role in shaping their career and serve as a significant method for professional development in the future:

“I believe that this [community] has significantly supported my own career development and pathway. Over the past three years, I have been able to grow by networking with others, gaining the confidence and self-assurance to express my own ideas at my workplace. I am confident that this will continue to play a strong role in my career development going forward.” (Member E)

Several participants also recognized the opportunity to **give back** to the community as an important aspect of its value. Being regarded as a professional who supports peers within the community forms a benefit for the individuals themselves as well, fostering further professional development opportunities and boosting their own professional confidence. Member A highlighted that this is closely connected to a collective willingness to offer assistance and encouragement to one another, as community members share a common interest in Customer Success. They explained that even providing positive feedback to another member can be highly valuable to themselves as well:

“That [giving back] might actually be something that sets this channel apart from others – the pleasure you get from helping others with your own knowledge, experience, or simply by uplifting others, giving feedback and saying, *‘Wow, that’s really great!’* and the feeling that comes from that. Or if someone wants to break into this field, I can say

‘Listen, these experiences are valuable’ or ‘Hey, I know of a place that might suit you, do you want me to link you up?’ So, this community is really about collective learning and supporting each other because the interest is mutual.” (Member A)

Member B further elaborated this by explaining that the community provides extensive opportunities for self-development, highlighting options such as volunteering or contributing expertise by serving as a presenter or mentor:

“You can develop your own skills as a presenter or be mentor or find a mentor. So, there's lots of flexibility, lots of opportunities, and also different volunteer roles that you can do there if you want to give back to the community and to the industry.” (Member B)

Member H also shared that it is especially rewarding when someone you have helped lets you know they advanced their career or solved a problem thanks to your advice. They described this as one of the greatest benefits of being part of the community:

“If you feel you have something to offer, whether at events or elsewhere, you naturally want to share it with others. Sometimes you might not even be sure how beneficial it is, but it’s better to share than to keep it to yourself. The most rewarding scenario is when, later on, the person you shared something with is genuinely impacted by it... That is perhaps the most satisfying part – knowing that you have been able to share your knowledge and receiving feedback that your contribution has positively influenced someone else’s career.” (Member H)

Building professional confidence was also closely connected to the community’s ability to boost the sense of **recognition for Customer Success as a profession**, which was something participants deeply valued. Member C noted that having a community such as Customer Success Nordics, where nearly all members have roles involved with Customer Success (or if not, at least recognize its strategic importance) provides validation and helps reinforce the overall identity of the profession:

“Customer Success is often regarded as something of an intermediary role. It's important to recognize that this is a legitimate profession, not just some bizarre role that varies wildly between companies. While it's true that the role can differ substantially depending on the company, it essentially bridges the gap between commercial aspects, product expertise, and customer interaction. The realization that other people also work in this field is validating; this isn't just some made-up position that only exists in certain organizations but is becoming quite established and recognized as a crucial part of business operations.” (Member C)

Recognising the profession also had another important effect on community members according to their experiences: it encouraged them to develop a **sense of unity** and **build a shared identity as pioneers in the field**, as they collaboratively advance this emerging field within Finland. This perspective is reflected in Member A’s observation that engaging with the community enables professionals to acquire best practices and implement them within their organizations. This

exchange benefits all organizations, particularly in Finland, where Customer Success remains a relatively new concept, ultimately raising standards across the field:

“This is a professional community that provides good insights and context into what one is doing and what could be done, and what could perhaps be more extensively introduced in Finland, since Customer Success thinking is not yet very widespread here. It's somewhat like a communal effort where you pick up good practices, which could then enrich all our own organizations. It's about raising the bar in organizations in general and in customer experience more broadly.” (Member A)

Member C further supported this perspective, describing that the community promotes social cohesion; professionals share common goals and experiences, jointly contributing to progress that benefits both individuals and the broader industry as a whole:

“From a collective standpoint, you get a sense of social cohesion or a shared sense of achievement, like, ‘*Hey, we are all doing something together that benefits us all*’ ... It gives you the feeling that we are all in the same boat – and that's really reassuring.” (Member C)

However, a significant ongoing challenge for professionals in the field is the lack of consensus regarding definitions within Customer Success, complicating efforts to foster a unified understanding and professional identity. This represents the final recurring subtheme identified in this research. Numerous participants consistently noted that **the definition of Customer Success varies substantially** across different organizations. In some organizations, Customer Success does not exist as a separate entity but is incorporated into other departments under different titles according to the participants’ experiences. Individuals may have actively performed functions that would typically be associated with Customer Success, but due to a lack of strategic emphasis or recognition, these responsibilities were handled by employees in other roles. Many participants shared that they had performed Customer Success duties while officially holding a different position, or, conversely, had worked under a Customer Success title but mainly handled new sales. For instance, Member B identified their previous work to be directly linked with Customer Success, but their official titles and recognized roles were always in other areas, such as sales or marketing:

“My title would be like Sales Manager, Expert Manager, or Marketing Manager. But in reality, it was project management and Customer Success, because we had to run the project, we had to make sure that everything is done in the good way. And if we saw customer was missing something, we would be educating the customer.” (Member B)

Many participants however recognized that the community could serve as an important support resource when **navigating this challenge of diverse definitions in Customer Success**. Since it is still a relatively new field, the role continues to vary depending on the company, and that is understandable. But learning about how others manage Customer Success in their organizations can

in fact help individuals understand their own position better, compare different approaches, identify what works for others and what doesn't, and consider potential areas for improvement. The variation in interpretations of Customer Success is not inherently negative; it may just require adaptation based on each organization's current needs. Member B noted that for them, simply understanding what other companies are doing helps them address this challenge:

“Because it [Customer Success] is still kind of a new thing, though it's not, but it is, especially for Finland. So, it's interesting to know how many companies are into that, how many companies are serious. And what does Customer Success mean for those companies? This can be very different. Sometimes it's very close to sales and sometimes it's more like technical support, sometimes it's its own, and there are variations... That's very interesting just to learn about that and maybe get some ideas if we can implement at our company.” (Member B)

However, Member A explained that challenges may also arise within the community when discussing specific topics, because each participant may interpret these issues and concepts differently based on their own Customer Success operations. As a result, it can be difficult to explore such topics in depth when there is significant variation in meaning among members. In these situations, the primary benefit typically then ends up being **the development of a shared understanding** of the various aspects of Customer Success and how for instance churn can be managed differently across organizations – which is also highly valuable:

“The main challenge might be how effectively you can delve into the topic of the day. This is often due to how discussion or workshop groups [in Customer Success Nordics' events] are divided and how much time is spent on each participant explaining what they do. If the discussion is about how *'We do Customer Success like this'*, and there are as many opinions on what that means as there are participants in the group, you really can't get to the core of the matter... The greatest benefit, therefore, is understanding how variedly Customer Success can be interpreted.” (Member A)

The findings from this last subtheme clearly demonstrate that Customer Success professionals gain considerable advantages from being part of a specialised community network. Such a community not only helps validate the profession but also creates opportunities for sharing experiences, providing positive feedback to one another and giving back to the community. All of these elements foster the development of enhanced professional confidence and a stronger sense of professional identity. As a result, these factors help professionals improve their skills and abilities, supporting both personal development and career progression. And while the diverse nature of Customer Success is not necessarily always negative thing, it does present challenges for professionals navigating this field due to the absence of a universally accepted approach. To address this, Customer Success professionals can leverage industry communities like Customer Success Nordics

to educate themselves and gain insights on various implementation strategies, adopt best practices, and tailor their techniques to meet the specific needs of their organizations. This approach not only promotes unity and fosters a pioneering spirit in the Finnish Customer Success sector but also enables professionals to effectively navigate ongoing challenges of an evolving field.

5 Discussion

The objective of this research was to identify how Customer Success communities support the professional development of Customer Success professionals. This objective was addressed through two research questions: *1. What needs do Customer Success professionals have regarding their professional development, and how do they pursue it?* and *2. How do professionals perceive the role of a Customer Success community in their professional development?* The following sections will discuss both questions and their related findings in detail.

5.1 Needs and methods for professional development

The key findings from this research reveal that Customer Success professionals today are confronted with a wide variety of demands, requiring them to possess a broad skill set and the agility to keep pace with rapid changes. Consistent with earlier studies, professionals confirmed that communication, organizational abilities, and other soft skills remain central for success in these roles, along with strong knowledge and understanding of the customer's business (Adams, 2019; Vaidyanathan and Rabago, 2020). Interestingly, this research does however depart from some of the earlier studies (Eggert et al., 2020; Graesch et al., 2024) by placing less emphasis on technical skills; participants did not identify them as among the most critical or universal requirements. However, this could be attributed to the prevalence of Customer Success roles within highly technical industries, such as SaaS, where technical expertise may be considered a baseline requirement rather than a distinct area of focus, and therefore not emphasized by the participants in this study.

A key new and academically relevant finding is the identification of emerging trends that significantly influence the evolving needs and developmental priorities of professionals in Customer Success. In particular, the results highlight the integration of AI and its substantial benefits in streamlining processes within the field. While prior research has discussed certain aspects of AI in the context of Customer Success – such as how AI-driven solutions transform customer experience (Chen and Prentice, 2025; Mainkar, 2026) – there has been limited focus on how these technologies affect professionals' skill requirements and development needs.

Professionals in this study emphasized the growing importance of AI for both their own and their colleagues' ongoing professional development. This emphasis is closely tied to the broader goal of improving operational efficiency, with many participants citing manual task loads as a barrier to greater progress. However, at the same time, professionals also anticipated a future trend toward

valuing personal connection, which would suggest that relationship-building skills will become even more crucial alongside the technological advancements. Furthermore, the role of Customer Success itself continues to evolve, increasingly shifting toward a strategic and consultative function. This evolution highlights the necessity for Customer Success professionals to enhance their strategic competencies and deepen their understanding of customers' industries and industry changes. Academically, these insights represent a notable finding, given the limited amount of existing research exploring emerging trends and professional development needs within the field.

The findings also demonstrate that professionals today place significant importance on their ongoing professional development, largely due to the demands of an era characterized by constant change. As noted in the literature review, organizations and markets are experiencing rapid changes due to megatrends and technological advancements, which creates pressure on both organizations and individuals to engage in continuous development (Dall'Alba and Sandberg, 2006; Thomson and Solsvik, 2020). This statement was confirmed in this research, with professionals identifying professional development as significant element for their career stability and progression and viewing it as necessary to remain relevant in the field of Customer Success. Intrinsic motivation also emerged as a key driver, consistent with existing studies that highlight the role of personal initiative in lifelong learning (Nokelainen et al., 2009; Thomson and Solsvik, 2020). However, the dynamic nature of Customer Success itself surfaced as a distinctive finding. Given the necessity for Customer Success professionals to serve diverse customers across various industries, remaining informed about developments in these sectors is critical to succeed in their roles. This specific aspect hasn't been clearly discussed before in academic literature, making it a novel finding from the study.

Additionally, the findings indicate that Customer Success professionals today employ a diverse range of learning strategies to advance their professional development. Notably, informal approaches emerged as the predominant method, with many professionals relying on on-the-job learning, feedback, social interaction, and networking (both within communities and workplaces) as integral components of their ongoing professional development. These findings are consistent with prior studies, which have found that workplace learning primarily occurs through informal methods, thereby facilitating the transfer of specialized and often tacit, domain-specific knowledge (Pylväs et al., 2022; Thomson and Solsvik, 2020).

In response to the first research question (*What needs do Customer Success professionals have regarding their professional development, and how do they pursue it?*) the findings from this

research indicate that proactive engagement in ongoing development is essential for professionals to sustain relevance and adaptability within this evolving field, and they mainly depend on informal learning methods to address their developmental needs. The subject areas of focus are expected to be significantly influenced by various evolving trends that will continue to impact the field in the coming years. The growing adoption of AI necessitates that Customer Success professionals enhance their AI expertise and actively engage with evolving Customer Success strategies in that sector. Simultaneously, the increasing importance placed on personal connections highlights the persistent need for advanced communication and relationship management skills. Therefore, professionals in this field must also continue to develop empathy, personal engagement, and an understanding of customer needs. Additionally, as the Customer Success function transitions toward a more strategic and consultative orientation, it is vital for professionals to prioritise building strategic skills and deepening their knowledge of customers' industries and market dynamics. These factors collectively shape the evolving professional development needs within the field of Customer Success.

5.2 Role of a community in professional development

In the literature review, I introduced the concept of Community of Practice (CoP) to explore why professionals often come together for collective learning and to examine the underlying drivers for forming such groups. Research on Customer Success Nordics reveals that it embodies many of the typical features of a CoP, though not perhaps in its most traditional form. Customer Success represents the shared passion and domain that unites members, while the contributing professionals and their relationships form the social structure and community element. The “practice” component is demonstrated through the exchange of shared resources – such as frameworks, case studies, tools, and common terminology – which is evident in the way professionals within Customer Success Nordics describe their interactions, sharing of best practices, application of real-world use cases, and adoption of a unified language. Unlike typical CoPs, this community did not originate from a single organization but emerged as part of a global movement, eventually developing into a non-profit association that welcomes all members regardless of current role or employment status. This inclusive approach enables problem-solving on a broader scale than would be possible within a single organization and supports community sustainability. Previous studies suggest that CoPs with these characteristics tend to be stronger, more authentic, resilient, and effective, as they are created in response to genuine professional needs (Chua, 2006; Pemberton and Mavin, 2007; Wenger, 1998).

Regarding the perceived role of a community in members' professional development, the research findings provide strong evidence of the multifaceted support professionals receive from the Customer Success Nordics community. These outcomes closely correspond with existing studies, particularly in relation to Communities of Practice (CoPs) and their documented drivers highlighted during the literature review. Key benefits included the development of social capital through connections and peer support, as well as access to knowledge resources and avenues for sharing best practices and effective solutions to practical challenges – each of which consistently aligned with prior research and demonstrate typical CoP benefits (Lesser et al., 2011; Mavri et al., 2021; Pemberton and Mavin, 2007; Wenger and Snyder, 2000). However, one unique benefit not covered in prior studies is the opportunity for benchmarking against peers. Since the Customer Success Nordics community brings together professionals from different organizations, members are able to compare practices and performance, making benchmarking a noteworthy advantage specific to this group. Additionally, while existing theories have identified the importance of offering support and contributing back to the community, along with strengthening professional identity and enhancing recognition and professional status (Mavri et al., 2021; Pemberton and Mavin, 2007; Wenger-Trayner et al., 2023), these latter two aspects are much less prominent in earlier research, making their significant presence in this study more noteworthy. Professionals placed substantial emphasis on the psychological value derived from enhanced professional confidence and on the fulfilment associated with giving back to the community. These elements contributed uniquely to their professional development, offering distinct advantages that are difficult to find elsewhere.

Another more notable new finding, which further suggests that Customer Success Nordics may not align with the conventional model of a CoP, is the substantial benefit it offers by supporting and empowering members in their job seeking efforts, which significantly fosters professional development and career advancement of members. Members particularly valued the practical assistance provided in recruitment processes through event workshops and the mentorship program. Such benefits have not previously been highlighted as defining characteristics of a CoP or within existing Customer Success research, making this observation a unique finding within this context. Additionally, professionals cited increased exposure and improved access to job opportunities via the community's networks as valuable resources. Several participants also relied on the community to gain deeper insights into Customer Success Manager role and organizations in Finland. While CoP theories have not previously explored these aspects in depth, this can likely be attributed to the nature of Customer Success Nordics, which functions as an official community comprised of

professionals from various organizations and is accessible to job seekers, which is not the most typical case of a CoP (Pemberton and Mavin, 2007; Wenger, 1998).

The unique nature of the Customer Success as a field itself revealed a rather unexpected impact: some professionals perceived their roles as isolated, lacking a strong network within their organizations. And even when such networks existed, some professionals still viewed their positions as solitary due to personal accountability for customer portfolios. This absence of colleagues in equivalent roles highlights the critical role of the Customer Success Nordics community, where engagement with peers provides invaluable, diverse perspectives and practical insights that significantly contribute to members' professional development. While existing research acknowledges certain challenges, such as insufficient strategic focus and limited resources (Adams, 2019; Gelb et al., 2020), the phenomenon of isolation within this emerging discipline has not been previously addressed, marking this finding as a noteworthy contribution to current academic understanding.

Finally, the findings of this research highlight the crucial role communities play in supporting Customer Success professionals as they address field-specific challenges. As Customer Success is a relatively new and evolving discipline, particularly within the Finnish environment, its definitions remain varied, presenting ongoing challenges for professionals. Consistent with previous research, this study confirms that the field continues to lack a unified business methodology, formal academic training, and in some cases, even strategic recognition and sufficient resources within organizations (Adams, 2019; Gelb et al., 2020; Vaidyanathan and Rabago, 2020). However, existing research has not thoroughly addressed the professional development of individuals in this field or explored how these challenges influence their developmental needs and career advancement. The findings from this research indicate that communities such as Customer Success Nordics serve as valuable platforms, enabling professionals to address these challenges collaboratively, share best practices, and deepen their understanding of diverse approaches. Furthermore, results show that these community interactions foster a sense of social cohesion among members, encourage pioneering efforts within the Finnish industry, and contribute to elevating overall standards in Customer Success. This collective sense of identity fostered by the community further validates the profession and strengthens the professional identity of its members. These insights represent a meaningful addition to the academic literature on Customer Success.

Overall, the results regarding the second research question (*How do professionals perceive the role of a Customer Success community in their professional development?*) suggest that these

communities provide substantial support for professionals in the field. They facilitate the acquisition of job-specific knowledge, alleviate feelings of professional isolation by fostering peer connections and peer support, and enhance members' professional confidence while helping to build a collective professional identity. Furthermore, these communities contribute to career advancement by empowering individuals seeking employment and providing insights into local organizations that implement Customer Success practices. Members also value collaborating within the community to navigate the varied definitions of Customer Success and consider the unique practical resources and diverse perspectives offered to be invaluable assets, as they are not always accessible within their individual organizations.

6 Conclusions

This qualitative study was designed to address a research gap in the field of Customer Success, focusing on the professional development of individuals in this field and examining the role that communities play in their development. Therefore, the primary objective was to understand how communities – such as Customer Success Nordics – support the professional development of Customer Success professionals. As an evolving discipline, Customer Success presents ongoing challenges to its professionals, many of which can be navigated with help from their professional community. Although definitions within the field continue to shift, peer collaboration through the community enable professionals to discover and adopt new strategies and practices, thereby enhancing their expertise. Beyond knowledge sharing, these communities offer a wide range of benefits including peer support, enhanced professional confidence, and empowerment in the job search process. The community also fosters a sense of collective identity, helping to legitimize the profession – an important need in this growing field. With emerging trends like AI shaping future demands of the field, professionals consider it critical to remain up to date and proactively engage in professional development activities and utilize various methods of learning to maintain excellence in their profession. In conclusion, this research establishes that communities like Customer Success Nordics can make substantial contributions to the professional development of Customer Success professionals by offering unique resources and a supportive environment that community members highly trust and value.

6.1 Theoretical and practical contributions

This research presents a comprehensive analysis of professional development activities, emerging needs, and support gained within a community of Customer Success professionals. The findings contribute significantly to the relatively underexplored academic field of Customer Success, particularly regarding the role and perceptions of professional communities. This study highlights the potential value that communities such as Customer Success Nordics provide to professionals in this evolving discipline and emphasizes the importance of offering such resources, especially in the absence of formal academic training programs. Furthermore, it adds to research on Communities of Practice by exploring communities formed across organizations rather than within them and by highlighting additional drivers for participation, such as leveraging these communities for job opportunities and career advancement and fostering a collective identity within an emerging profession. The research also deepens our understanding of professional development in commercial roles, especially in Customer Success, by offering key insights into the challenges and

expectations professionals currently face in developing their skills. However, the most significant novelty value in this research lies in its identification of emerging needs, trends and challenges in Customer Success that have not yet been widely addressed in existing literature, thereby delivering compelling insights to the academic discourse in the field.

Additionally, the research offers valuable insights to the case organization, Customer Success Nordics, by illustrating the motivations of its members, their engagement with the community, and the perceived advantages of participation. Identifying emerging needs and trends from the study can guide the community in refining its offerings and content to better meet the future professional development requirements of its members.

In summary, these findings make a significant contribution both to the academic understanding of Customer Success and to the practical knowledge of the support that Communities of Practice provide – knowledge that Customer Success communities can use now and in the future to better understand their members.

6.2 Research limitations

The first dimension of limitations in this research relates to its scope and cultural context. This research is a case study focused on a specific, local Customer Success community in Finland, therefore the findings are limited to this particular group. A broader, extensive case study could have provided insights into multiple communities as instruments for professional development. Therefore, the results may not be widely generalizable; however, the intent of an intensive case study is to provide detailed understanding rather than broad generalization (Eriksson and Kovalainen, 2016). Additionally, the study's cultural context is restricted as the community is based in Finland and consists of individuals working in Finland – although a few of the interviewees were with an international background and some work remotely for companies not physically located in the country – still, the findings do largely remain contextualized within the Finnish culture.

The second dimension of limitations is defined by the specific domain of Customer Success, as these results may not be directly comparable with outcomes from communities in other fields. While certain findings (such as the typical benefits associated with a Community of Practice) may have some degree of generalizability due to their community research-related nature, insights related to field-specific challenges within Customer Success are inherently linked to this particular context.

The third dimension of limitations relates to the qualitative methodology employed in this research. Although this approach was appropriate for addressing the aims and objectives of this particular study, it carries certain challenges commonly associated with qualitative research, such as difficulties in maintaining objectivity, managing substantial volumes of data, and addressing the exploratory and interpretative nature characteristic to this type of research (Gibbs, 2012; Gillham, 2000). Therefore, a quantitative methodology could potentially offer a more objective perspective and allow for statistical generalizations regarding the outcomes experienced by community members and the factors driving their ongoing engagement.

6.3 Future research suggestions

The identified limitations also present valuable opportunities for future research. Beyond the suggestion of employing quantitative methodologies, expanding the study's scope beyond its current domain and cultural setting could produce insightful findings. Finland has a variety of communities active in different business sectors in both formal and informal settings. Future research could investigate whether the benefits and values derived from community participation vary significantly among different types of communities and if the driving factors are consistent in more generalist, cross-domain groups, or if motivations shift depending on the context. Another approach would be to maintain focus on a specific domain but examine it across different cultural backgrounds; for instance, do Customer Success communities worldwide share similar advantages and challenges, or do cultural differences lead to distinct experiences? As Customer Success is still relatively new and unexplored field academically, such research could provide substantial new insights to the academic literature. Also, a noteworthy characteristic of the Customer Success Nordics community is the high proportion of members (60%) with an international background. Investigating the reasons behind this demographic trend, as well as possible differences in motivations between international professionals and their Finnish counterparts to join and remain engaged in the community, presents another compelling research direction.

Additional research suggestions from this study include examining the range of roles within Customer Success, since organizational interpretations vary widely in terms of resources and strategic emphasis. Future research could analyse how businesses define Customer Success within their organizations and what daily responsibilities entail across different settings, which would help to identify optimal models for various organization types. Another avenue worth exploring is the relationship between the strengthening of professional confidence and community involvement – a key benefit identified by professionals in this study. Investigating why professional confidence is so

profoundly impacted and how communities foster environments that promote such development among members could offer valuable insights. Furthermore, networking and job-seeking emerged as clear themes throughout the research. Despite extensive academic discussion on leveraging networks for career advancement, changing labour markets and economic uncertainty make job searches increasingly difficult today. As a result, more professionals seem to be seeking alternative pathways, including utilizing communities to secure employment and advance professionally as work life demands intensify. Future research could examine how communities support members in job searches, what specific forms of help they offer, and how professionals navigate their networks to achieve employment, including how long the process typically takes. This represents the final notable direction for additional research suggested by the study.

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Appendices

Appendix 1: Interview framework for community members

1. Background, career path and motivation:

- Describe your career path and how you ended up working in Customer Success.
- Where are you currently employed and in which role?
- In terms of your career, which direction do you see yourself professionally growing toward in the future? What motivates you to develop yourself professionally?

2. Professional development as a Customer Success professional:

- How important do you consider professional development to be for someone who is in your role/profession?
- In your opinion, which skills are most critical for success in a Customer Success role?
- What kinds of professional skill-development needs do you have related to Customer Success?
- What type of methods, platforms, practices and techniques do you use to further your professional development in the field of Customer Success?
- How significant are communities, especially Customer Success communities, for your professional development?
- In general, how beneficial do you consider community engagement to be for someone in your role or profession? Do you belong to any other communities than Customer Success Nordics?

3. Supporting professional development – Customer Success Nordics:

- When did you join the Customer Success Nordics community and how did you find it? How often and in which ways do you engage with the Customer Success Nordics community now? What motivates you to remain as an active member in this community?
- What kind of a role and impact Customer Success Nordics and their activities have had in your professional development? Has the community been able to help you solve a specific challenge or problem in your work? If possible, provide specific examples of community interactions and describe their outcomes and overall impact.
- How have the resources, events and networks offered by Customer Success Nordics aligned with your needs of professional development? Which ones have been the most meaningful resources for you personally?
- How do the resources and events offered by Customer Success Nordics compare to other methods you use for your professional development?
- Has networking within the community affected your professional development? How?

- Is there any reason you might consider not attending these events anymore? If so, what would be the cause?

4. Improvement ideas and future of the community:

- What suggestions do you have for improving the Customer Success Nordics community's functions? Are there specific areas or topics you wish the community would cover more extensively?
- What trends or future developments in Customer Success do you think the community should prepare for?

5. Conclusion:

- What have been the most valuable things that you personally feel you have gained from this community?
- How has your involvement in a Customer Success community influenced your overall professional development and career path?
- Is there any specific value that you feel you have gained professionally only through the Customer Success Nordics community (that you could not have received elsewhere)?
- In what ways do you anticipate this community will contribute to your future professional growth?
- Would you like to add any further points, comments or insights? Or would you like to clarify anything from your previous responses or discussion?

Appendix 2: Detailed AI use declaration

Declaration of the Use of Artificial Intelligence (AI)

In the creation of this thesis, I utilized generative artificial intelligence for several support tasks. The tools, their purpose, and the verification measures are detailed below. I confirm that I have used all AI tools with the necessary care and caution, have fully disclosed their use in accordance with university policy, and take full responsibility for all content presented in this thesis.

1. Tool: Microsoft 365 Copilot (using the GPT-4 language model developed by OpenAI)

- **Stage of use:** Throughout the entire thesis process for proofreading, text editing, and language enhancement.
- **Purpose of use:** The AI tool was utilized for enhancing the language, its clarity and correcting grammatical errors in the text.
- **Verification:** All suggested changes were carefully reviewed to maintain the original meaning of the arguments and ensure the academic content remained accurate. I retained final control over the text.

2. Tool: Scopus AI (via University ID)

- **Stage of use:** Literature search
- **Purpose of use:** The AI tool was used to search for academic literature relevant to the three theory topics addressed in the thesis (Customer Success, Professional development, and Communities of Practice).
- **Verification:** The AI tool was used to generate summaries and identify peer-reviewed articles relevant to the three theories. The references were carefully reviewed, and some suggested articles were utilized for the literature review. No AI-generated content was used directly; Scopus AI was utilized solely as a research aid in accordance with TSE guidelines for AI.

Appendix 3: Research information sheet & interview consent form



Research information sheet

1 (2)

2025

DESCRIPTION OF THE STUDY

Name of the research

Professional development in Customer Success through communities

Invitation to participate in the research

The aim of this research is to explore how professionals within the field of Customer Success utilize a community (Customer Success Nordics RY) to enhance their professional development. The study seeks to gather insights through interviews about your experiences and perceptions regarding your profession in Customer Success, involvement in the Customer Success community, your professional development and growth, networking opportunities, and the overall impact of the community on your career path.

You are invited to participate in this research because you are an active member of the Customer Success Nordics RY community. Your involvement in this group, combined with your professional background in Customer Success, makes your insights particularly valuable for understanding the role of professional Customer Success communities in professional development.

The aim is to conduct interviews with approximately 10 members of the Customer Success Nordics RY community, as these individuals collectively represent a broad range of experiences and viewpoints that are crucial for an in-depth analysis of community impact on professional development.

Voluntary consent

Participation in this research is voluntary. You can withdraw from the research or cancel your participation at any time without assigning a reason for this decision. Withdrawing or cancelling your participation does not result in any negative consequences. In case you decide to withdraw your consent, the data collected until that point will be used for the purpose of this study in an anonymized and confidential form.

Please, read this description of research with care. If you have any questions, you can be in contact with the researcher. The contact details are provided at the end of this document. If you decide to participate in this study, please see the attachment for informed consent at the end of this document.

Responsible researcher

The responsible researcher of this study is Jane Nurmala as a master's student with Entrepreneurship major at the Turku School of Economics at the University of Turku. Although this study is conducted for Customer Success Nordics RY, the organization is not responsible for the execution of this thesis research.

Jane Nurmala operates as the keeper of the register and thereof is responsible of the lawful processing of the personal information gathered within the research. In scientific research the processing of personal data is based on the societal task of universities defined in the university law and it progresses public good.

The research method

The primary method for this research is qualitative interviews, aimed at gaining deep insights into professional experiences and perceptions.

Each interview is expected to last approximately 60 minutes.

The objective of the interview is to explore how Customer Success professionals utilize the Customer Success Nordics community for their professional development. Key themes include their career paths, engagement with the community, experiences of professional development and growth, and perspectives on the community's activities and offerings.

The interviews will be recorded, and audio will be transcribed to text.

The possible harm and discomfort related to the research

You may interrupt the interview at any time if you wish to do so. Should you need to pause or stop the interview for any reason, please feel free to notify the interviewer immediately.

Confidentiality and data privacy

Your identity is known only to the researcher and as the author of the master's thesis, the researcher is bound by confidentiality. All data collected about you will be handled confidentially, and your information will not be identifiable in any research outputs, reports, or publications.

Only personal data essential for the purposes of the research will be recorded in the research register. The researcher will not disclose your name or contact information to any third parties. In research results and other documents, you will be referred to only by a code identifier, such as initials or a pseudonym. The register is stored securely at the University of Turku until the research is concluded. Register data and research data are kept separately.

If you decide to withdraw your consent, the data collected up to the point of withdrawal will be used in the research in an anonymized and confidential manner.

Costs of research and funding

Participation in this research is free of charge. No compensation will be paid for participating in the study, and no reimbursement will be provided for any potential loss of earnings or travel expenses incurred due to participation in the research. The research is funded by the researcher.

Further information

If you have any questions about the research, please feel free to contact the researcher. You can discuss with them any questions or concerns that may arise during the study.

Contact details:

Jane Nurmala

jane.s.nurmala@utu.fi



CONSENT FOR PARTICIPATION IN RESEARCH INTERVIEW

I have been invited to participate in the research study titled "Professional development in Customer Success through communities". I have reviewed the research information sheet provided and have received sufficient information about the research and the related data collection, processing, and sharing activities.

I understand that the content of the study has been explained to me both in writing and verbally, and I have received satisfactory answers to all my questions regarding the study. The explanations were provided by Jane Nurmala.

I have had enough time to consider my participation in this study.

I understand that participating in this research is entirely voluntary. I have the right to withdraw my participation at any time during the study without having to give any reason and without any negative consequences. I am aware that data collected up to the point of withdrawal will be used as part of the research data, handled anonymously and confidentially.

By starting my participation in the interview, I confirm my voluntary consent to participate in the research as described in the research information sheet.

Appendix 4: Privacy notice



PRIVACY NOTICE FOR RESEARCH DATA

1. Name of the research registry

Professional development in Customer Success through communities

2. Data controller of the research

Jane Nurmala, [REDACTED] jane.s.nurmala@utu.fi

Turku School of Economics, Rehtorinpellonkatu 3, 20500 Turku

3. Contact person in matters related to the research registry

Jane Nurmala, [REDACTED] jane.s.nurmala@utu.fi

4. Purpose of processing personal data

The research involves collecting interviews that inquire about Customer Success professionals' experiences and perceptions regarding their professional development within a Customer Success community. Email addresses will be used to send interview invitations. During the interviews, data will be collected of the participants' experiences and perspectives regarding their engagement in the case study community, such as their involvement in events and mentorship programs, the impact of these activities on their career growth, networking opportunities, and their overall experience and satisfaction with the community's support in facilitating their professional development.

5. Legal basis for processing personal data

The legal basis for processing personal data under Article 6 of the EU General Data Protection Regulation (GDPR) is:

Processing is necessary for the purposes of scientific research (public interest Art. 6(1)(e)).

The data subject has given consent to the processing of their personal data for one or more specific purposes (consent Art. 6(1)(a)).

6. What categories of personal data the research data includes

The register will store the following information about the data subject:

- *Email address for interview invitations*
- *Professional role, employer and background in Customer Success*
- *Duration of membership in the Customer Success Nordics community*
- *Perspectives on Customer Success as a profession and its associated professional development requirements*
- *Participation in community events and activities*
- *Feedback on community offerings and suggestions for improvement*

- 7. Recipients of personal data and groups of recipients:**
Data will not be transferred or disclosed outside the research team.
- 8. Information on the transfer of data to third countries:**
Personal data will not be transferred outside the EU or the European Economic Area.
- 9. Duration of storage of personal data or criteria used to determine this period:**
Interview recordings will be transcribed into text files, and the recordings will be destroyed. Direct identifiers will be removed from the research data. Data will be stored for the required 5 years, after which the data will be securely destroyed.
- 10. Rights of the data subject:**
The data subject has the right to request access to personal data concerning him or her and to request correction or deletion of their data or restriction of processing or to object to processing. The right to delete personal data does not apply in scientific or historical research purposes when deletion likely prevents or seriously impedes the processing. The implementation of the right to deletion is assessed on a case-by-case basis. Data subjects have the right to lodge a complaint with a supervisory authority.
- 11. Information on the source of personal data:**
Email addresses needed for sending interview invitations are requested directly from the participants for this purpose. Other data is collected directly from the individuals participating in the interview study.
- 12. Information on the existence of automated decision-making, including profiling:**
Data will not be used for automated decision-making or profiling.

Appendix 5: Data management plan



Data management plan

1. Data used in research

Data used in research "Professional development in Customer Success through communities".

Data types	Data contains personal information	Self-produced data	Data produced by others	Additional notes
Data type 1: <i>Interview recordings and transcriptions</i>	x	x		The data will be gathered directly through interviews focused on understanding the professional development impacts facilitated by the Customer Success Nordics community.
Data type 2: <i>Email communications for interview setup</i>	x	x		

2. Processing of personal data in research

As my research data includes personal information, I am obligated to comply with the EU General Data Protection Regulation (GDPR) and the Finnish Data Protection Act. For datasets containing personal data, I have prepared a privacy notice for my research participants and determined who will act as the data controller for the dataset.

I will prepare a privacy notice for the participants and provide it to them before data collection

Regarding personal data, the data controller will be the student university

My dataset does not contain personal data

3. Permissions and rights associated with data use

3.1 Self-produced data permissions:

- **Type 1:** Interview data: Permissions will be obtained from participants for recording, transcribing, and using the data for research and publications.
- **Type 2:** Email communications: Consent will be obtained for storing and using email addresses for communication regarding the research.



3.2 Permissions for data produced by others:

Not applicable as all data is self-produced.

4. Data storage during research

Data will be stored in the researcher's computer

In the university's online folder

In the university's secure cloud service Seafile

Somewhere else, where?

5. Data documentation and metadata

5.1 Data documentation

For data documentation I will use

A research diary

A separate document for recording key information (changes, analysis, variables)

A readme file that accompanies the data

Other, what?

5.2 Data organization and integrity

How do I keep your data organized and intact, and avoid unintentional changes:

I maintain the original material independently from working versions to ensure it is available for reference when required.

I plan version control in advance and consistently follow naming conventions

I consider the lifecycle of the data and prepare for changes to the data from the very beginning (e.g., recording, transcription, file format conversion, storage).

5.3 Metadata

I am not storing my data in a public archive and do not need metadata.

6. Post-research completion data handling

Data after completion of research:

- **Retention period:** All data will be retained for five years post-research as per university recommendations.



- **Data disposal:** Data containing personal information will be destroyed after the necessary retention period to ensure compliance with GDPR.

After completing my studies at the University of Turku, I will transfer the data to a secure, GDPR-compliant cloud storage solution where it will remain accessible only to me, the researcher. This storage solution will ensure that the data is protected and maintained securely for the required five-year retention period.

Regular reviews of the security measures and access controls will be conducted to ensure ongoing compliance with data protection regulations.