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UNLOCKING GROWTH FROM WITHIN:

The Customer GTM Playbook

Acquiring net-new customers has never been more difficult, costly, and unpredictable.



Not only is it becoming more challenging to reach revenue goals through new customer acquisition, but the consequences of churn and missed opportunities are becoming more severe. A departing customer is not easily replaced, not to mention the additional onboarding costs and required trust-building efforts. To confront this growing challenge, forward-thinking companies are shifting their focus inward toward the customers they already have.

We interviewed six industry experts in customer success leadership roles to uncover how pioneering organizations are building structured, scalable customer go-to-market (GTM) strategies to unlock predictable revenue from existing accounts. Our key findings were evident: For companies looking to thrive, not

just survive, growth must be driven from within. Strategic account management, when properly executed, is the most effective way to grow existing accounts, increase renewals, and mitigate risk.

We found that the most successful teams are those that abandon outdated tools like spreadsheets and traditional CRMs built for new business, and instead adopt platforms that are purpose-built for account teams to generate revenue after the close. This ebook explores the specific strategies for how CROs and revenue leaders are rethinking their GTM strategy around current customers and implementing systems to scale.



THE CHALLENGE: The Difficulty of Acquiring Net-New Customers Is at an All-Time High

Gone are the days of limitless funding and endless resources for growing tech companies. Businesses are replacing a 'grow at any cost' mindset with the goal of achieving sustainable growth, meaning decision-makers are scrutinizing spending decisions more closely than ever. For B2B SaaS businesses, acquiring new customers is more costly and requires greater effort. The B2B SaaS industry saw a [14% increase in CAC ratio](#) from 2023 to 2024, and sales cycles have lengthened from an average of [94 days in 2021](#) to [120 days in 2024](#).

This means that businesses relying on new customer acquisition to reach revenue goals will struggle if they assume that CAC is the same as it was a few years ago. Equally as significant, the consequences of churn are also amplified. It's harder to replace departing customers, especially large accounts. The onboarding of new customers brings additional costs and a steep learning curve, further compounding the challenge. New customers have to learn about you, and you have to learn about them. Even if a business is able to replace a former customer with a new account of the same size, the hidden cost of the trust-building process still remains.

Revenue forecasting is also becoming more difficult. Tried and true sales techniques aren't

working like they used to, and market conditions are changing rapidly and unpredictably. This development is strikingly apparent in cold call data. Cold call success rates, defined by the number of conversations resulting in a booked meeting, are down from [4.8% in 2024 to 2.3% in 2025](#). In other words, sales reps need to double the number of calls they make to book the same number of meetings that they did last year.

Businesses need to dedicate more resources to customer acquisition if they want to maintain the same rate of new customers that they had a few years ago, and those that continue to pour more resources into this increasingly challenging venture might inadvertently begin to neglect current customers. "I've heard a lot of frustration from customers who buy tech that they feel like they don't get support. The technology is just dropped in the middle of the organization and abandoned," observes Demetra Anagnostopoulos, Chief Success Officer at [SurePeople](#).

The Costs Of Neglecting Current Customers Are Skyrocketing

"Growing revenue within your existing customer base is less expensive than going out and finding new customers. It's like talent: it costs a lot to onboard a new person," says Erin Taylor, VP of Account Management at [NFI Industries](#). So why do so many businesses still disproportionately focus on acquiring new customers when it's [less costly](#) to sell to current customers?

Perhaps it's because there's pressure from investors and the broader market to demonstrate growth and market penetration through new logo acquisition. Maybe it's because businesses want to expand into a new segment and diversify their customer base. "Most organizations don't think about how existing customers buy... GTM strategies focus heavily on new customer acquisition rather than expansion. Everybody thinks it's easier to sell to existing customers, so less planning effort is put in. It's taken for granted," says Ahmed Quadri, former Chief Customer Officer at [ThoughtSpot](#) and [Heap](#).

There are benefits to showing your business can acquire new customers, and no one says that this effort should be abandoned completely. However, the bottom line is that customer retention and expansion are a more efficient way to drive growth. In fact, [Bain & Company](#)

theorizes that increasing retention by just 5% can boost profits by as much as 95%. Shifting too many resources away from your current customers represents a devastating missed opportunity for growth.

Cost #1: Increased Churn

When businesses neglect to look for growth avenues within their current customer base, they aren't only missing out on expansion opportunities. The business is actually putting itself at risk of losing that customer altogether. "If you're looking at the continued growth potential of your top ten customers, then that means you're doing everything you can to keep them as well. Every CEO is asking, 'What more can I get out of this?' If you're not in that motion with your customers, I think you're in trouble," warns Quadri.

"Everybody thinks it's easier to sell to existing customers, so less planning effort is put in. It's taken for granted."



Ahmed Quadri
Former Chief Customer Officer, ThoughtSpot and Heap

When you aren't in touch with the evolving needs of your customers, churn becomes more unpredictable. Your product might be slowly losing its value to your customer, but without the proper dedication to retention, you might not realize it until the customer tells you they are leaving. Ramona Aubry, Global VP of Sales and Customer Success at [Expert.ai](#), notes that businesses need to not only demonstrate initial value to their customers, but continue to show expanding value as the relationship grows: "If there's not a quantifiable business value that you can measure and continually refer to, you're at risk of losing that client. You might sell to them, but not renew. And if you renew and don't expand, that's always a lagging indicator of churn."

"If you're not growing, you're churning."



Ahmed Quadri
Former Chief Customer
Officer, ThoughtSpot and
Heap

As customers' needs and circumstances change, failure to adapt can leave organizations blindsided by departures, resulting in stalled growth and missed opportunities. Miss

the warning signs and you'll be taken off guard, and have no chance to prepare and mitigate the downside of that customer's departure. You also miss a chance to figure out how to communicate the value of your product in a different way that might help retain the customer.

Cost #2: Complacency leads to missed growth opportunities

The potential pitfalls don't end once a trusting relationship is established with your customers.

Customer success organizations might fall into the trap of believing that their trusting customers will proactively signal that their needs are evolving, but this is not the case. "The number one risk in our business is typically the things that customers are not telling us. We can't trust customers to tell us that something is happening. There's always more business to get. There's always an opportunity to get better at the relationship," says Taylor.

Jarrett Schmidt, VP and Head of Sales at [Phrase](#), says that he realizes his team has missed out on additional revenue opportunities because a customer will say, "Hey, we're paying somebody else to do this for us. And if you prioritize it, then we'd pay you." Schmidt goes on to say it doesn't always make sense for his business to offer what the customer is looking for, but notes that the need was only revealed after the customer mentioned they were using a different service. There's no guarantee your customer comes to you first if you haven't proactively communicated that you can meet their additional need.

The industry leaders we interviewed indicate that there is no finish line to the customer relationship-building process. The relationship needs to be constantly nurtured and moved forward.

Cost #3: Reputation Damage

When a business neglects its current customers to the point where the customer feels like they need to end the relationship, there exists the direct consequence of lost revenue from that account. But the pain doesn't end there. The loss of a customer, especially a top customer, creates a ripple effect that impacts a business's reputation as well as its revenue. "Losing a top

ten account is always problematic for us beyond just the revenue, it has a reputational impact and a strategic impact because for us, brand trust is the most important currency that we have as a company," says Aubry.

When you lose a customer, it's usually because the customer no longer trusts you to deliver on their needs. Other customers might take notice and start thinking, 'Well, if it's not worth it for their top customers, is it worth it for us?'. By losing a customer, your trust level with other existing customers might decrease, even if those other customer relationships have been maintained flawlessly.

But your current customers aren't just a cost to protect. In fact, existing customers represent a **gold mine of potential revenue growth** when accounts are managed strategically.





Forward-Thinking Companies Shift Their Focus Inward

Yes, losing current customers is increasingly costly. However, the customer success experts we interviewed are not managing their existing customer relationships out of fear of loss. Rather, they see existing accounts as a massive growth opportunity.

According to Anagnostopoulos, many tech businesses are actually starting to adopt a “client services or consulting approach” to customer management, a noticeable shift away from the ‘set it and forget it’ approach that has existed in the past. “We need to get into the mindset of ‘We’re selling a certain technology and we also have to be able to deliver on what the technology is supposed to do for the customer,’” adds Anagnostopoulos.

Proactive Monitoring of Accounts

The work to understand your customer does not end after the sale. Successful businesses continuously monitor the health of their customer relationships, ensuring they have up-to-date information on their clients’ pressure points. Proactivity is key, and account management teams must avoid complacency.

As customer needs change, account management teams that react proactively can position themselves as indispensable partners for their customers. The industry leaders we interviewed indicated that their teams are always looking to proactively communicate how they can provide value, especially when conditions are changing. “We’ve moved from a reactive mode to proactive and predictive being the norm for us,” says Aubry. By doing so, account managers can establish their businesses as an essential linchpin for their customers during times of change.

“I think it’s wonderful to have CSMs that are actually about customer success and not trying to pull dollars out of their customers. You develop a really good, trusted advisor relationship that way.”



Jarrett Schmidt
VP and Head of Sales,
Phrase

Account Managers That Position Themselves as Champions for Their Customers

For a business to prove to its customers that it is a necessary partner, a substantial account team infrastructure must be in place. At [NFI Industries](#), Erin Taylor says “We have a top-quality strategic account management program that is staffed by a critical team of people who are deeply invested in our customers’ business and who take the time to understand our customer’s strategies, their directives, both at a corporate level and also at an individual business unit level.”

Taylor adds that there are other challenges that make relationship quality not the sole determinant of growth. Market factors and evolving customer needs also play a significant role. Another challenge is that a good relationship with a customer does not guarantee visibility and transparency into the customer’s needs. Even if teams recognize the need to grow and nurture existing customers, they still need to have an efficient way to monitor these customers. There’s a need for insights that enable the anticipation of new client needs, which is crucial for growing and expanding current accounts.



The best account/customer success managers are primarily focused on building trust, nurturing relationships, and establishing themselves as advocates for their customers. With this approach, revenue-generating opportunities naturally reveal themselves. Schmidt at [Phrase](#) says, “I think it’s wonderful to have CSMs that are actually about customer success and not trying to pull dollars out of their customers. You develop a really good, trusted advisor relationship that way.”

Building Structured, Scalable Customer GTM Strategies

An inefficient approach to customer relationship management can be just as damaging as inaction. Delayed responses to changing needs can lead to customer churn despite good intentions. All the experts we interviewed said that there were moments when they felt they left money on the table with existing customers, and this was often due to inefficient systems and tools. "We had money on the table and it was not lost because of the lack of demand, but a gap in our internal capacity to respond quickly enough," says Aubry. Commonly used business tools like traditional CRMs (Salesforce, Hubspot, Dynamics, etc.) and spreadsheets often fall short in achieving the level of visibility needed for a proactive approach. So, how can teams build a system that is both effective, agile, and scalable?

Through our interviews with customer success experts, we discovered that a robust GTM strategy for existing customers requires the following four attributes:

- 1. Identify key accounts and create a network of contacts throughout the customer organization, including the executive team.**

To truly get a full understanding of your customers, you need to be able to understand how their individual business units come together, and this requires relationships with more than just one person. "We not only have this multi-threaded engagement, but more

of a network of relationships so that we can touch different departments that are a part of the customer journey," says Aubry. Kim Peretti, Chief Customer Officer at [Restaurant365](#), adds that her team focuses on 'white space navigation' to build multi-threaded relationships and avoid "single points of failure." Multi-threaded relationships are also key to reducing the risk of churn. If a supporter of your business leaves for a different role, you still have other supporters within your customer that will vouch for your service. "You have to take enough time to build at least five relationships in a client system; you cannot be stuck with one person," says Anagnostopoulos.

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Demetra Anagnostopoulos
Chief Success Officer,
SurePeople

Innovative products like [Kapta's Org Chart](#) enable teams to easily understand their customers' organizational structures and visualize the power dynamics and decision-making capabilities that exist within those structures. This tool offers unique insight into building and leveraging a network of multi-threaded relationships.

2. Demonstrate tangible, continued value to customers, with communication tailored to each client's unique needs in order to build trust.

Account teams should always seek new ways to provide value, focusing on "value discovery, realization, and articulation," says Quadri. This process is not one-size-fits-all. It needs to be highly personalized to each buyer. "It's about understanding the audiences that you are trying to serve. What are the major issues

and challenges for each audience?

We need to tailor the journeys through our tech to accommodate the needs of the audience," says Anagnostopoulos.

Achieving this level of individual attention across a diverse profile of customers is exceedingly challenging with traditional CRMs or spreadsheets, but advanced

customer management tools like [Kapta's QBR tools](#) are allowing for increased scalability.

When account management teams are focused on finding new ways to provide value, they are able to act proactively when customers' needs change. This proactivity creates a strong level of trust and reliability, to the point where the customer knows that "even if you don't have 100% of what they're looking for, you're going to work with them side by side to come up with creative solutions to help," according to Anagnostopoulos.

3. Ensure internal alignment to help meet customer goals and expectations.

Cross-functional alignment is essential for account teams to be successful at scale. "It's very important to have this cross-functional alignment so that when sales or customer success identify an expansion opportunity, we have the resources in place to meet that demand and not put at risk additional revenue that can come from these accounts," says Aubry.

Being able to recognize a new customer need is great, but it can be useless if your business does not have the internal capacity to respond. Teams need to be able to recognize the need and communicate how your business can help meet the need in a way that you can actually follow through on. Doing so requires internal alignment with teams that will be ultimately responsible for execution.

Recognizing the opportunity is just the first step. Alignment needs to be in place to actually capitalize. Tools like [Kapta's Strategic Account Plans](#) help with this process.

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Ramona Aubry
Global VP of Sales and
Customer Success, expert.ai

4. Collect the right data

Data can help teams assess the health of current relationships, identify opportunities for improvement, and quantify the ways in which they are helping their customers. Again, traditional CRMs and spreadsheets make this very challenging, but new services like [Kapta's results dashboard](#) are vastly increasing the efficiency of the data collection process.

Data allows you to prove your value to your customer and position your product as something absolutely necessary.

When the above four attributes are achieved, a degree of predictability returns to revenue generation, and the risk of customer churn is reduced. Increased visibility and quantification of account health means you aren't taken off guard by changes in client needs, and the ability to be proactive means that teams can more easily forecast growth opportunities.

To meet these criteria, teams need more than traditional CRMs that only provide surface-level data and fail to actively monitor the health of existing customer relationships. Customers want to feel like they have a dedicated team focused on their success beyond the moment the contract is signed, and account teams need the right tools in place to do this at scale across a large number of customers. Existing customers expect white-glove service, and your team needs dedicated tools to deliver this experience. A CRM-like platform is needed, but not one that is built for sales teams and geared towards net-new customer attainment.



THE CHALLENGE:

A CRM Purpose-Built For Account Teams

Traditional CRMs largely focus on new business, and existing account management software largely focuses on renewals rather than expansion, observes Ahmed Quadri. Many of the Customer Success leaders we interviewed indicated they use multiple disconnected tools to monitor the health of their customer relationships, and gathering information across multiple tools is time-consuming and often requires dedicated operations personnel. The process is not very scalable.

Fortunately, there are tools out there that are streamlining the road to a robust GTM plan for existing customers. Kapta is a CRM that is purpose-built for account teams. The platform provides account teams with a clear organizational structure of their customers, with detailed profiles for individual contacts. This makes it vastly easier to build a network of contacts within an account and achieve multi-threading.

Kapta also equips teams with an Account Health Score, which is a unique algorithm that provides a quick snapshot of client relationship health, enabling you to anticipate risk and focus on accounts in need. Erin Taylor uses this tool for her team at NFI Industries: "It's easier to go to the dashboard so I don't have to manually maintain this data in a spreadsheet."

Account Health Score gives teams the ability to quantify the unquantifiable and identify opportunities for growth and risks of churn, so account managers can act efficiently and effectively. The result is increased visibility into the right data and the consolidation of customer KPIs into a single dashboard, giving teams the ability to view metrics across all accounts to evaluate risk.

These tools allow for enhanced reaction time to changes in customer relationships. If a relationship is deteriorating, you can either address the issue or prepare to minimize risk to your organization's revenue goals. An element of predictability returns.

"Kapta is helpful for any organization that is looking to leverage existing relationships to drive growth, and being able to gauge customer health quickly and accurately is critical to successful engagement of executives, both internally and within customer organizations."



Erin Taylor
VP of Account Management,
NFI Industries

CONCLUSION

Capitalizing on Existing Customers



Businesses that continue to overly rely on new customer acquisition to reach revenue goals will be overwhelmed by high costs and unpredictability. Forward-thinking businesses are taking a different approach by looking to maximize their relationships with the customers they already have. A 'client-services' mindset is replacing the idea of "set it and forget."

But providing your customers with a white-glove service that allows you to be proactive to meet their changing needs is time-consuming and unscalable without the right tools. Fortunately, Kapta is making it possible for account management teams to gain visibility into the health of their accounts in an efficient and scalable way, allowing them to take proactive action that positions their product as indispensable to their customers.

The customer GTM playbook helps businesses find scalable ways to communicate the expanding value of their product to existing customers. Visit kapta.com to learn more.

Learn more