

Magic Quadrant for Customer Success Management Platforms

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Customer success management is a crucial function for B2B organizations with recurring revenue streams. This Magic Quadrant evaluates vendors offering a CSM platform that can guide customers to value, provide visibility into customer health and scale the customer success practice.

Market Definition/Description

Customer success management (CSM) platforms are AI-enabled SaaS solutions used by B2B organizations selling subscription-based solutions to guide life cycle interactions and provide visibility into account health. CSM platforms help customer success and account-facing teams to achieve customer retention, growth and value realization objectives. They provide the ability to define and execute playbooks and automate customer outreach based on triggers or specific journey stages. Using data ingested from internal and external sources, these platforms can provide customer health alerts and suggest or automate next best actions. These platforms also provide capabilities for managing and resourcing the customer success function.

Businesses that offer high-value products and/or services, often sold through subscription models, are using CSM programs to retain and grow revenue from existing accounts. Customer success management is the business discipline of guiding customers to realize value through product adoption or service utilization across the owning life cycle. It uses a data-driven approach to monitor customer health and engagement and uncover insights that drive proactive and prescriptive action leading the customer to derive value, renew, expand and advocate. CSM platforms are necessary to scale the function, providing

oversight and insight into team performance and the hundreds or thousands of accounts at various life cycle stages.

CSM platforms provide capabilities to create a holistic view of the customer, guide customers through their onboarding and owning journey, and surface customer health indicators in a way that provides actionable insights to all stakeholders. They also provide capabilities for managing the function, including customer segmentation, account assignments and planning, individual activity and performance, pipeline management and revenue forecasting.

To provide more transparency and predictability in achieving customer renewal and growth targets, CSM platforms support the following use cases:

- **Self-contained customer success teams:** This scenario is for customer success teams that support a small number of products and users.
- **Enterprise customer success functions:** This scenario is composed of large and distributed teams supporting a robust product portfolio.
- **Integrated customer success and service offerings:** This scenario is for monetized customer success offerings that can be bundled with premium support, customer education and/or professional services.

Mandatory Features

- **Customer data management:** Bidirectional integration with CRM solutions and the ability to integrate and use customer data from multiple additional sources. Other sources include (but are not limited to) product analytics, customer data platforms (CDPs), data warehouses, ERP, learning management systems (LMSs), case management, knowledge management solutions, marketing automation, account-based marketing (ABM) and voice of the customer (VoC) platforms.
- **Customer profile management:** Build or automatically generate profiles that provide a holistic view of the customer. This includes products and services purchased, interactions, and where clients are in their life cycle journey for each solution.
- **Account success plans:** Ability to capture, refine and track progress toward desired business outcomes and resourcing requirements that support joint internal planning with sales, marketing and service teams.

- **Playbooks:** Codify, customize, execute and track the use of best practices to manage customer journey stages such as onboarding and renewals, and customer situations like risk or growth opportunities journey.
- **Customer adoption, health tracking and analytics:** Generate and track customer adoption or health scores, triggering alerts and touchpoints. Analyze health and engagement trends over time for individual accounts and segments, guiding customer success managers in proactive decision making.
- **Customizable dashboards and analytics:** Create and customize customer account and team performance dashboards that provide aggregate views and summaries at the segment, team and individual customer success manager level. Ability to extend to cater to enterprise stakeholders, including sales, customer marketing and product team needs.
- **Application of GenAI to increase efficiency:** Use of GenAI to generate real-time account summaries and customer communications that can be used to streamline customer success efforts.

Common Features

- **Onboarding checklists and workflows:** In-application onboarding, checklists and guided workflows for users.
- **In-app prompting:** Direct support for providing proactive in-app user guidance as a means of outreach, either directly or through integration with a digital adoption solution.
- **Project or service management:** Provide embedded capabilities or integration with other platforms to provide resourcing and project management for onboarding and ongoing or discrete-need services.
- **Collaboration with internal and partner teams:** Ability to share and collaborate with other employees and partners on account insights and actions directly within the platform or through other channels such as Microsoft Teams or Slack.
- **Forecasting:** Renewal and pipeline growth forecasting capabilities.
- **Meeting scheduling:** Automated meeting scheduling capabilities.
- **Collaborative spaces for customers:** Direct customer-facing collaborative spaces for sharing and updating customer success artifacts and plans.

- **Application of GenAI to improve insights:** Use of GenAI to generate health scores and alerts through the most pertinent and real-time signals including customer communications.
- **Application of GenAI to improve customer outcomes:** Use of GenAI to generate custom playbooks based on health scores or other inputs to drive desired performance outcomes. This includes the ability to execute certain playbooks without human intervention.
- **GenAI conversational assistant:** Use of GenAI conversational assistants to support platform users with answering questions and completing tasks.
- **AI agents and agentic AI:** Use of AI agents or agentic AI to execute tasks such as business review scheduling and preparation alongside customer success managers or at-risk customer identification, alerting and playbook initiation.
- **Administration:** Dedicated systems administrator space, for platform configuration, access controls, AI feature management and sandbox/testing environment.
- **Value tracking:** Ability to track progression toward value targets by defining business outcomes and associated KPIs agreed upon with customers.
- **Customer community integration:** Integration with or direct support for an online customer community.

Magic Quadrant

Figure 1: Magic Quadrant for Customer Success Management Platforms





Gartner.

Vendor Strengths and Cautions

ChurnZero

ChurnZero is a Leader in this Magic Quadrant. The ChurnZero CSM platform helps customer success (CS) teams guide their customers in effectively using their SaaS solutions.

ChurnZero primarily serves North American midmarket B2B subscription organizations in technology and professional services, but also supports some large enterprise accounts globally.

Its product is packaged into three editions: Startup, for those with fewer than 50 employees; Professional, for midmarket organizations; and Enterprise.

Over the past 12 months, ChurnZero has expanded its AI capabilities with Engagement AI and Relationship Agents to analyze customer interactions, surface customer sentiment and automatically update contact fields for real-time relationship insights. It has also improved the user interface to enhance platform usability

The vendor's roadmap for the coming year is heavily focused on expanding AI capabilities. The enhancements include using AI to recommend relevant goals in success plans based on customer behavior and engagement, AI-powered business reviews at scale, and AI personalization in playbooks. It is also planning to enhance machine-learning-powered Success Insights by including additional signals to reveal risks and opportunities with greater accuracy.

Strengths

- **Innovation:** ChurnZero's considerable investments in AI have led to advanced capabilities, such as a coordinated set of AI agents that manage contact-level dynamics at scale. AI agents are available through their native marketplace, making them easily accessible to customers.
- **Product roadmap:** ChurnZero's product roadmap looks to build on its advances in AI with more AI-focused updates across the next 12 months. These planned enhancements are designed to deliver advanced automation, actionable insights for CS teams and a personalized experience for customers.
- **Customer experience:** ChurnZero assigns each client a dedicated CS manager who supports them throughout the entire relationship. It has also created a sophisticated customer feedback loop by using multiple channels and touches to collect and continuously incorporate customer feedback into the product roadmap to meet evolving customer needs.

Cautions

- **AI costs:** Many of the AI features, such as Engagement AI or product WalkThroughs, are not included as standard capabilities in the Professional and Enterprise editions, and will require an additional licensing fee.

- **Vertical strategy:** ChurnZero primarily focuses on SaaS organizations. Customers outside SaaS should carefully assess whether ChurnZero's capabilities align with their specific industry and organizational needs.
- **Product administration:** While peer reviews often score ChurnZero highly, a common challenge that many cite is the learning curve associated with maximizing the value obtained from the platform.

ClientSuccess

ClientSuccess is a Niche Player in this Magic Quadrant. Its ClientSuccess CSM platform focuses on providing CS teams with core CS capabilities in a scalable and efficient manner.

The company's customer base is primarily located in North America and typically consists of midmarket B2B SaaS companies.

Its product is offered in three packages: Startup, Growth and Enterprise, with pricing varying based on the number of unique customers managed.

ClientSuccess acquired Product Signals in early 2025 to enhance its product feedback and feature request management capabilities. Previously, in 2024, it also acquired Baton to improve its onboarding and implementation services.

ClientSuccess declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Product adoption:** ClientSuccess is often praised in user reviews for its user interface, which allows CS teams to quickly adopt and use the platform without extensive training.
- **Reporting and analytics:** Users report that ClientSuccess's dashboards and reports make it simple to track key metrics such as renewals, expansion opportunities and customer engagement.
- **Market responsiveness:** ClientSuccess has expanded to target use cases for buyers that have sophisticated products that require initial extensive onboarding or ongoing services that require project management.

Cautions

- **Organizational change:** A series of acquisitions over the past year and turnover in the executive-level team have led to concerns about the vendor's ability to establish a clear and sustained position in the market. Customers should monitor for potential changes in product direction or support that may affect long-term stability and partnership.
- **Product innovation:** ClientSuccess's product innovation strategy, particularly for digital-first CS motions, lags behind other vendors evaluated in this Magic Quadrant. Customers should evaluate whether their evolving needs will be addressed by the product roadmap.
- **Market presence:** In recent Gartner client inquiries, buyers rarely mention ClientSuccess when considering CSM platform alternatives. This is likely because the vendor has limited market awareness.

Custify

Custify is a Niche Player in this Magic Quadrant. Custify's Customer Success Platform is designed to provide a user-friendly interface to a full range of capabilities that can make CS teams quickly effective.

Custify is self-funded and targets small and midmarket B2B SaaS companies in Europe, North America and India. The majority of its clients are companies with under \$100 million in revenue and that are scaling and have outgrown basic tools.

For startups, Custify offers a discounted single platform package for the first few years. Midmarket accounts usually begin with a pilot, charged as a fraction (based on duration) of the annual platform cost. Onboarding services and a dedicated CS manager are included in the subscription price.

Notable updates over the past year include the CustifyAI suite, offering AI-generated customer summaries, conversation summaries, automated follow-up task creation and role-specific customer 360 views. The vendor has also undertaken customer portal enhancements, including translations and task tracking.

The near-term Custify roadmap includes the capability to define and monitor customer objectives. Additional plans include the introduction of AI health scores, a conversational AI assistant and knowledge-based functionality.

Strengths

- **Vertical strategy:** Custify serves both technology and service companies and has a strong array of industry-specific case studies providing proof points on customer outcomes.
- **Market responsiveness:** The vendor demonstrates a strong awareness of how its customers' postsales teams, spanning service and sales, are consolidating and working together. Hence, it has introduced Custify as a browser plugin, making it accessible to multiple functions for collaborative work.
- **Sales strategy:** Custify focuses on proving value through a structured pilot during the presales process. It also lowers customer effort through concierge onboarding to meet the needs of its target SMB and smaller midmarket accounts.

Cautions

- **AI innovation:** Custify lags behind other vendors evaluated in this Magic Quadrant in its application of AI. Near-term roadmap items — such as AI sentiment analysis, an AI assistant for customer data and AI content generation — simply put Custify at parity with what other vendors have already launched. In addition, it did not share its roadmap beyond 2025.
- **Sales execution and pricing:** Custify has a relatively small number of salespeople, with a low-price introductory standard plan. Buyers should be aware that the vendor may face issues with long-term viability if it is unable to ramp up its sales.
- **Geographic strategy:** Custify has not invested in developing sales or service partners in regions outside North America and Europe. This limits its ability to serve customers in other developing markets such as India.

Gainsight

Gainsight is a Leader in this Magic Quadrant. Gainsight's CSM platform combines CS, customer insights, product experience, communities and educational capabilities in one solution.

Gainsight's customers are B2B and B2B2C organizations based primarily in North America. It also has a growing presence in Europe and has started operations in Japan.

During 2024 through 2025, Gainsight made several acquisitions, including Staircase AI for adding capabilities to automate the incorporation of sentiment gleaned from within customer interactions and communications into the platform. Other acquisitions such as

Skilljar, Erica Kuhl Consulting and ModerateKit help the platform align community and education experiences within the CS experience.

Over the past year, Gainsight added digital engagement capabilities via upgrades to its journey orchestrator and by introducing Atlas, a family of AI agents for identifying and acting on risk signals in customer communication and renewal processing.

The vendor's roadmap includes three focus areas: user-focused capability enhancements, increased support for digital-led CS and integrated AI, and agentic AI to deepen insights and autonomously guide customers. These culminate into capabilities such as an adoption agent that autonomously watches for low adoption and then automatically reaches out with personalized guidance to customers.

Strengths

- **Innovation:** Gainsight's acquisitions and roadmap are oriented toward increasing digital engagement and scaling CS practices and teams. In addition, it has introduced innovation centers for applying AI to capture more timely customer insights and to design and execute more streamlined customer engagement.
- **Scalable deployments:** Gainsight's solution is effective for scaling from small workgroups up to large-scale enterprise use cases, serving thousands of active users. Customers benefit from a platform that can grow with their organization and handle increasing complexity as their needs expand.
- **Market education:** Gainsight has leveraged its acquisitions to add publicly available training and certification programs. These programs complement the vendor's CS conference and online community, helping customers build expertise and industry connections.

Cautions

- **Customer retention:** In Gartner client inquiries, existing Gainsight customers evaluating other CSM platform options have indicated that this is due to pricing concerns or resistance from their teams to fully adopt. Buyers should establish a clear path to value based on their investment.
- **Product complexity:** Due to the considerable breadth and depth of Gainsight's product portfolio, prospective customers often ask, during Gartner client inquiries, if they will face longer implementation and adoption times, compared to other vendors evaluated in this

Magic Quadrant. Buyers should not assume that all capabilities are needed and assess which functionality best suits their near-term and longer-term goals.

- **Channel strategy:** Except in Japan, Gainsight has largely relied on its own sales and service teams to sell and service accounts. Customers located in developing regions, including other parts of Asia, should be aware that local partner support and faster onboarding may be less readily available.

HubSpot

HubSpot is a Niche Player and a new entrant in this Magic Quadrant. HubSpot's CS solution, Customer Success Workspace, is a deeply integrated part of its Service Hub platform. All Service Hub Professional and Service Hub Enterprise customers have access to Customer Success Workspace as part of their subscriptions.

HubSpot targets both traditional and digital-first CS teams in midmarket and small B2B SaaS companies globally. Building on its position within customer service practices, it natively connects CS and customer service functions throughout the customer journey.

Although the product is new to the market, it has recent updates such as the release of Breeze Copilot in Customer Success Workspace, which can be used by CS managers to prepare for meetings. Additionally, through a connector with OpenAI, it is now possible to search the entire HubSpot database from within Customer Success Workspace.

HubSpot's roadmap leverages its recent acquisitions, Frame AI and Dashworks, to introduce CSM Concierge AI Agents. It is also planning to add AI agents to facilitate handoffs from sales to CS teams, to trigger alerts based on customer comments within tickets or other communications, and to provide CSM coaching tips based on recorded customer calls.

Strengths

- **Unified platform:** HubSpot's unified Service Hub platform provides native integration with other HubSpot applications across marketing, sales and service. This helps to eliminate data silos, improve workflows and enable the platform to act as a consolidated source for all customer data.
- **Partner ecosystem:** HubSpot has a robust partner ecosystem with over 6,500 solution partners and more than 1,900 apps. Customers benefit from a wide range of integration options and access to specialized expertise to tailor solutions to their unique needs.

- **Pricing for AI capabilities:** HubSpot offers embedded and inclusive AI capabilities as part of its platform subscription, at no additional cost to customers.

Cautions

- **Product capabilities:** As a new market entrant, HubSpot's CS capabilities currently lag behind the more-established vendors evaluated in this Magic Quadrant, particularly in the areas of customer data integration from outside sources and customer collaboration spaces. Buyers needing advanced CS features should carefully assess whether HubSpot's offering meets their requirements.
- **Market traction:** Due to the newness of the product, HubSpot has limited adoption of its Customer Success Workspace. Buyers should recognize that the offering may have less user community support and fewer proven best practices compared to more-established solutions.
- **Product roadmap:** Beyond the CSM Concierge AI Agents mentioned above, HubSpot provided limited visibility into its roadmap beyond 2025. Therefore, customers may face challenges in planning the evolution of their CS practice.

Planhat

Planhat is a Leader in this Magic Quadrant. The Planhat unified customer platform synchronizes global postsale revenue teams around customer outcomes such as net revenue retention. It features a contemporary, customizable interface and collaborative customer portals designed to support engagement and partnership.

Planhat targets B2B SaaS midmarket organizations and enterprises in industries such as financial services, technology and managed service providers. Its geographic coverage is global, with a strong emphasis on North America and EMEA.

Last year, Planhat rolled out a platform upgrade and Portals 2.0, which enhances external collaboration and offers customizable branding and UI, advanced roles/permissions for data collaboration, and better automations and reporting.

Planhat's roadmap continues to extend the flexibility to manage private and public customer data objects in the platform. It also focuses on AI integration, the ability to build your own AI agents to directly interact with data and embedded customer service agents within

discussions. Also, the vendor is expanding service delivery capabilities to unify professional services and support the evolving needs of go-to-market teams across diverse industries.

Strengths

- **Time-series data platform:** Planhat's unified customer platform leverages structured, customer-defined, time-series data to deliver real-time and comparative customer journey insights. It extends these capabilities with integrated AI agents to automate workflows.
- **Customer collaboration:** Planhat enables secure, two-way collaboration between its customers and the organizations that they serve through an advanced portal for shared project management and communication. It enables an unlimited number of users to foster cross-functional teamwork.
- **Advanced AI capabilities:** Planhat offers conversational intelligence capabilities including interaction summarization, categorization and sentiment analysis, along with AI-powered workflow automation. It also includes a Model Context Protocol (MCP) server that connects large language models to Planhat's APIs for advanced workflows.

Cautions

- **Marketing positioning:** Planhat's unified platform is positioned as a solution for revenue generation throughout the entire postsales life cycle. This reduces its focus on CS features. Buyers seeking targeted CS solutions should assess whether Planhat's wider set of functionality meets their specific needs.
- **Third-party tools for in-app messaging:** Planhat relies on integrations with third-party tools like Intercom and Pendo for in-app messaging, rather than offering this functionality natively. Customers will need to license these tools separately to receive key customer engagement features.
- **Focus on midmarket and enterprise buyers:** Planhat is not tailored or priced for SMBs and midmarket organizations with smaller CS teams. Potential customers with small deployments should evaluate other vendors that offer a lower entry point.

Totango

Totango is a Leader in this Magic Quadrant. The Totango CS platform targets enterprises with recurring revenue models that are looking to existing customers for growth.

It primarily supports high-tech and telecommunications, managed service providers, and financial services across several industries. It serves customers in North America, Europe, Australia and New Zealand.

In 2024, Totango acquired Parative AI, bringing in a new CEO and talent to power its new Data-Science-as-a-Service offerings. Totango aims to expand beyond the traditional CS buyer to CROs and CFOs by focusing on customer-led growth.

Totango is increasing investments in R&D and building an AI-first business. The vendor's roadmap items include a unified value realization system to define and track progress toward customer outcomes and ROI, a headless architecture for wider access to CS data and actions, and CS AI agents to scale digital CS motions.

Strengths

- **Market responsiveness:** Totango demonstrates a strong understanding that enterprise CS teams now need to create a discipline of revenue management, contain the function's costs and streamline customer engagement. This focus will resonate with buyers seeking to use the CS team as a lever for growth.
- **Marketing execution:** Totango has revised its value proposition and messaging from traditional CS to customer-led growth, helping its customers increase revenue by driving business results for their end customers. Also, Totango's introduction of customer value-tracking capabilities reinforces this new position.
- **Product roadmap:** Totango's roadmap includes plans for team performance tracking and suggested account allocation, and postsales renewal and expansion forecasting. Leveraging its ability to integrate multiple systems and data into its platform, it plans to introduce AI-agent-based digital CS orchestration for automating tasks within and outside of Totango.

Cautions

- **Sales execution/pricing:** Totango is undergoing a change in its go-to-market strategy — with a shift toward providing AI services and a new pricing model based on the amount of customer revenue managed in the platform. This creates uncertainty for buyers unaccustomed to pricing tied to the scaling of their growth.
- **Geographic strategy:** Totango has limited direct geographic presence outside North America and Israel, and lacks a set of global system integration partners to expand its

ability to serve customers globally. Customers located in other regions should be aware that local partner support and access to the new Data-Science-as-a-Service offerings may be less readily available.

- **Organizational change:** The merger of Totango and Catalyst last year, and changes in the strategy and executive leadership team, have introduced volatility. Potential buyers should assess their goals against Totango's ability to deliver a solution and customer experience that meet their requirements.

Velaris

Velaris is a Visionary in this Magic Quadrant. Its CSM platform is designed to improve the customer collaboration experience, offering no-code cross-system workflow orchestration and delivering a high-touch service model for rapid adoption.

Velaris targets midmarket and enterprise B2B SaaS companies, and its customer base is primarily concentrated in the technology sector. It is headquartered in Europe, where most of its customers are currently located. However, North America has been the vendor's fastest-growing region over the past year.

Last year, Velaris invested heavily in improving the user experience (UX) to align with conversational designs influenced by conversational AI tools. The fully refreshed UI includes modernized layouts, updated colors and improved consistency across the platform.

For its roadmap, Velaris has shifted nearly all new feature development toward AI. These features will include an AI command center that proactively analyzes calls, emails and support tickets to derive next actions and communicate them to the CS manager. They are also designed to reduce manual effort, improve coverage, and proactively identify risk and opportunity signals at scale for customers.

Strengths

- **Enterprise integration layer:** Velaris Bridge functions as a no-code/low-code orchestration layer with a drag-and-drop interface that enables CS operations teams to build multibranch automations and complex cross-platform workflows. This capability helps them to reduce the reliance on engineering support.
- **AI innovation:** Velaris has made significant advancements in AI, introducing five major AI-powered capabilities. These include health scoring, meeting summaries, risk detection, trending topic analysis and task creation.

- **Customer onboarding:** Velaris continues to provide human-led onboarding for all its clients. Its high-touch model includes weekly calls in the post-go-live phase and allows flexible customization and midrollout changes at no extra cost.

Cautions

- **Market presence:** Although Velaris has made significant progress, it still lags behind other vendors evaluated in this Magic Quadrant in terms of brand awareness and the size of its user community. This may result in fewer readily available educational and thought leadership resources and less peer support for customers compared to more-established platforms.
- **Customer experience:** Velaris plans to rapidly expand its business and grow its customer base in the coming year. Buyers and customers should validate that the premium, white-glove services currently offered to all its clients will be continued without a change to the service level.
- **Geographic strategy:** The majority of Velaris's sales and support teams are located in Europe and customers in North America and the Asia/Pacific region are supported remotely. Buyers in North America and the Asia/Pacific region should evaluate the vendor's ability to provide timely and region-specific support.

Vitality

Vitality is a Niche Player in this Magic Quadrant. Its CSM platform aims to transform CS into a strategic, scalable revenue-driving function by providing unified collaboration and embedded AI.

The Vitality CSM platform mainly targets CS leaders and their teams in midmarket SaaS and tech companies. Its customers are predominantly in North America, with a growing number in EMEA.

Over the last year, Vitality has been updating its CSM platform with a focus on AI and automation to improve its data management and collaboration capabilities. Vitality recently released capabilities for AI-generated customer summaries; AI Copilot, which allows users to query data; and AI actions that autogenerate tasks.

Vitality's roadmap includes coming to parity on AI features like AI-generated health scores and segmentation. The vendor is also planning to introduce AI agents to manage technical

tasks in the platform such as entering and enriching data. The company also plans to offer open-source CS with user-generated frameworks and templates for all customers to benefit from.

Strengths

- **Internal and customer collaboration:** This feature enables CSM teams to manage projects, tasks and goals internally and use data-rich, shareable documents to directly collaborate with their customers on plans like onboarding, quarterly business reviews (QBRs) and success milestones.
- **AI innovation:** Vitaly's AI capabilities include AI account summaries that go beyond the data to assess risks, opportunities and sentiment, and suggest action items and include links to sources for increased trust. AI actions can be triggered by a user to generate objects such as task, risk and product request objects.
- **Time to value:** Vitaly reports that its customers, on average, achieve significant ROI within nine months, which is a faster timeline than many other CSM platforms.

Cautions

- **Community solution:** Vitaly does not support an integrated community solution and this limits the ability for customers to learn from peers as they continue to adopt and evolve their CS practices.
- **Third-party tools for in-app guidance:** Vitaly does not natively offer in-app walkthroughs or in-app messaging and relies on third parties for these capabilities. Buyers will need to evaluate additional licensing costs and integration efforts to receive capabilities for in-app guidance.
- **Account-level AI:** Vitaly's AI solutions are currently available only at the account level. Customers seeking aggregate book-of-business-level AI insights will have to wait for a future release.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection

of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

HubSpot met this year's inclusion criteria.

Dropped

No vendors were dropped from this Magic Quadrant.

Inclusion and Exclusion Criteria

To be evaluated for the customer success management platform Magic Quadrant, the following criteria must be met:

- The product must be publicly marketed and sold as a stand-alone solution that is clearly aligned to address a customer success business function and need, such as marketing it as a "customer success management platform."
- The provider must have at least 50 full-time total employees and have sales presence in at least 2 regions (North America, LATAM, EMEA, APAC).
- The provider must have at least one of the following:
 - 100 total active paying customer accounts
 - 1000 paying monthly active users
 - Over the past 12 months: have added 25 new active paying customers, with an average of at least 20 monthly active users each.
- The CSM Platform must have been generally available for purchase for at least one year.
- The CSM Platform product version being evaluated must be generally available as of 1 July 2025.
- The product must meet Gartner's Market Definition for CSM platforms.

Honorable Mentions

Certinia (Customer Success Cloud): Certinia initially launched CSM capabilities for its existing professional services automation platform customers in 2023. It then launched a stand-alone product called Customer Success Cloud in September 2024. This product is not included in this Magic Quadrant because, by 1 July 2025, it was not generally available for purchase for at least a year. However, Customer Success Cloud includes the capabilities required to be included in the Magic Quadrant, with a growing customer list.

Evaluation Criteria

Ability to Execute

Product or Service: This criterion assesses the capabilities, features and overall quality of the core goods and services that compete in and/or serve the defined market. We specifically look for the ability to:

- Integrate and leverage customer data to guide customers to value and provide ongoing insight into customer health
- Extend to incorporate and collaborate directly with employees across the organization, partners and customers
- Incorporate AI to increase effectiveness and impact
- Provide a good cadence of ongoing updates with a methodical release process

Overall Viability: This criterion assesses the organization's overall financial health and practical success of the business. Viability views the likelihood of the organization to continue to offer and invest in the product as well as the product position in the current portfolio. We specifically look for:

- Evidence of financial strength
- Evidence of customer growth and retention
- Evidence of other drivers of viability

Sales Execution/Pricing: This criterion evaluates the organization's capabilities in all presales activities and the structure that supports them. This includes pricing and negotiation, presales support, and the overall effectiveness of the sales channel. We specifically look for:

- Direct and indirect sales revenue and customer growth
- Pricing clarity, flexibility, affordability and value for the money spent

Market Responsiveness/Record: This criterion assesses the ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. It also considers the provider's history of responsiveness to changing market demands. We specifically look for:

- Mergers and acquisitions (M&A) in response to market demand
- R&D investment into new functionality, making it easier for customers to implement and adopt
- Evidence of listening to, adapting to and aligning with customer needs and market trends

Marketing Execution: This criterion evaluates the ability to deliver clear, high-quality, creative and

effective messaging via publicity, promotional activity, thought leadership, social media, referrals and sales activities. This includes the organization's ability to influence the market, promote the brand, increase awareness of products and establish a positive reputation among customers. We specifically look for:

- Evidence of brand awareness, perception and strength
- Evidence of go-to-market differentiation
- Partner ecosystem, customer community, advocacy and CS program strength

Customer Experience: This criterion assesses the degree to which a vendor's products, services

and programs enable customers to achieve their desired results. This includes the quality of supplier/buyer interactions, technical support or account support, as well as ancillary tools, customer support programs, availability of user groups and service-level agreements. We specifically look for:

- Evidence of high customer experience metrics
- Customer community, advocacy and CS program strength

- Mature customer experience business capability

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	Low
Customer Experience	High
Operations	NotRated

Source: Gartner (November 2025)

Completeness of Vision

Market Understanding: This criterion assesses the ability to understand customer needs and translate them into products and services. Vendors with a clear vision of the market listen to and understand customer demands, and they can shape or enhance market changes with their vision. We specifically look for ability to:

- Listen to current customer demands, understand how those needs will evolve in the future and adapt their roadmap accordingly
- Grasp business and technology trends and their implications on customer experience initiatives

- Demonstrate a grasp of current and future competitors and any overlap with adjacent software markets

Marketing Strategy: This criterion evaluates clear, differentiated messaging consistently communicated, both internally and externally, through social media, advertising, customer programs and positioning statements. We specifically look for clarity of:

- Differentiation (product, business practices, customer experience)
- Strong articulation of the ideal customer profile
- Positioning to meet the needs of current ideal customer profile and new customer target segments

Sales Strategy: This criterion assesses a sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service, and communication. The sales strategy includes partnerships that extend the scope and depth of a provider's market reach, expertise, technologies, services and its customer base. We specifically look for:

- A defined approach on routes to market, including channel partners, digital commerce and marketplaces
- A value-based selling strategy

Offering (Product) Strategy: This criterion assesses an approach to product development and delivery in a way that meets current and future requirements, with an emphasis on market differentiation, functionality, methodology and features. We specifically look for:

- Roadmap investments that keep pace with customer expectations
- Investments in the application of AI
- Investments intended to support simplifying the ability to implement, configure and maintain the solution
- Architecture, platform scalability and UI/UX investments

Vertical/Industry Strategy: This criterion evaluates the strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals. We specifically look for evidence of:

- Targeting and traction within sectors beyond traditional SaaS

- Marketing, sales and partner investments to support vertical industry requirements and use cases

Innovation: This criterion assesses the marshaling of resources, expertise or capital for competitive advantage, investment, consolidation or defense against acquisition. We specifically look for evidence of:

- Product innovation that improves the effectiveness and impact of CS and differentiates the solution
- Customer experience and operational innovation in new forms of training, education, events, licensing and organizational changes
- Innovation through working with new forms of software and service partners

Geographic Strategy: The provider’s strategy to direct resources, skills and offerings to meet the specific needs of regions outside the providers’ home region, either directly or through partners, channels and subsidiaries. We specifically look for evidence of:

- Product R&D and professional services to align with local geographic needs
- Sales and marketing to support local geographic needs
- A partner ecosystem development program to support local geographic needs

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	NotRated

<i>Evaluation Criteria</i>	<i>Weighting</i>
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (November 2025)

Quadrant Descriptions

Leaders

Leaders are established vendors that have the ability to execute their vision through CSM products and services and demonstrate solid business results in the form of revenue and customer growth. Leaders have achieved successful customer deployments beyond a single industry sector, from small deployments to multiple examples of larger enterprise-class deployments. Leaders are often the vendors against which other providers measure themselves.

Challengers

Challengers are often more established than Niche Players and achieve higher volumes of new business. They have the size and product capabilities to compete in multiple regions, but they might not be able to provide a compelling vision.

Visionaries

Visionaries deliver innovative and potentially market-changing solutions, but they struggle to meet the needs of all organizations due to geographic limitations, company size constraints and/or specific product limitations. They have strong potential to influence the direction of the market, but are limited in terms of execution and/or track record.

Niche Players

Niche Players sometimes offer the best solutions for the needs of organizations of a particular size or industry, considering the price/value ratio of their solutions. However, they

may lack specific functionality or support for enterprise or industry requirements. They may offer complete portfolios, but limit their market focus to specific segments or regions.

Context

This Magic Quadrant is designed to help evaluate CSM platforms, providing details on the market and vendor capabilities that align to your business problems and technical concerns. Your shortlist should be determined by the complexity and scale of your requirements. This Magic Quadrant is not designed to be the only tool for creating a vendor shortlist. Use it as part of your due diligence, in conjunction with Gartner analyst discussions and other CSM platform research, including the associated Critical Capabilities for Customer Success Management Platforms.

Gartner clients shouldn't assume a vendor with a Leaders quadrant placement in CSM platforms is always the best fit for all companies. Differences in product offerings, pricing and packaging, innovation, and go-to-market strategies vary by vendor. Therefore, every provider in this Magic Quadrant, no matter its placement, may be a best fit for a client, and clients should explore how that diversity meets their business and customer experience needs. Gartner clients should follow a deliberate RFP process when selecting a CSM platform vendor. The RFP process aligns the buying team around the value for the purchase, creates consensus for the selected vendor and helps ensure support for the implementation.

Gartner recommends evaluating the following factors when procuring and implementing a CSM platform:

- **Use cases and requirements:** CSM platforms should enable the organization to apply its best practices for guiding customers to product and service value. Use-case needs should support the intended business outcomes, which may extend from customer retention to growth, and from adoption to advocacy. Supporting those goals may require use-case needs that may differ across customer segments, regions, and products or services.
- **Employee scope:** Determine which employees and functions will use the CSM platform, whether it resides solely in the CS function or incorporates other customer-facing employees and sales/service partners.

- **Implementation and deployment criteria:** Beyond functional considerations, also closely scrutinize the vendor's data architecture, administration layer, UX, associated analytics and professional services organization (both direct and partner). With an increase in the importance of adhering to data privacy regulations, it is paramount to understand how and where data will be stored, which team members will have access to it, and how it will be used.
- **Reference customers:** Always delve into the prospective vendor's customer base to explore exactly what is being delivered and the outcomes achieved. Look beyond the size of the deployment (number of users) to include the complexity of the customer and product portfolio being supported. Ask about client retention and tenure rates, along with efforts to improve the customer experience. Use Gartner's Peer Insights user reviews as a resource.
- **Roadmap and innovation:** Most vendors included in this Magic Quadrant have robust roadmap plans, including the increased role of AI. Ensure that the vendor's roadmap is consistent with the vision of how you want to incorporate customer data and insights into your plans and processes. Specifically for the use of generative AI, validate where and how it will operate within the platform, and ensure that access to customer data by GenAI features is consistent with your corporate guidelines and governance models on the extent of its use.

Use a hierarchical, weighted vendor evaluation model. This analytical hierarchy process helps deliver an objective, comprehensive and transparent CSM platform vendor and software evaluation process.

Magic Quadrant reports are snapshots in time. To be impartial and to complete our analysis, we stop our data collection efforts at a specific time for all vendors. In this case, the product/service capabilities were required to be in production and generally available in June 2025 to be considered in our evaluation.

Market Overview

The CSM platform market continues to grow and mature despite adverse market conditions. Important market developments in the last year are provided below,

The CSM Platform Market Has Grown Slowly, but Steadily

Gartner estimates the market grew 11% in 2024. The slowdown we observed in 2023 has intensified after the post-COVID-19 SaaS bubble burst. Several factors are driving this trend; not only are CS teams shrinking, but they are also now being absorbed into support, service or revenue teams. When CS is subsumed into another function, technology consolidation is also likely, and CS needs may be addressed by a broader revenue enablement or CRM platform. Anecdotally, based on Gartner client inquiries, we also observe CS teams increasingly looking for lower-cost alternatives to reduce operational expenses.

The CSM Platform Market Is Expected to Grow by 10% to 12% in 2025

The size of the CSM platform software market is expected to grow modestly from \$532 million in 2024 to \$590 million in 2025. These market sizes and growth rates are calculated based on the software revenue of vendors that are primarily marketed as CSM platforms (as defined in this Magic Quadrant). Market revenue growth has varied between 14% and 18% over the last few years. For 2025, the three-year CAGR is 11.3%.

Growth rates are cooling down because the new buyers aren't driving as much revenue as the traditionally large purchases by enterprises in mature markets like North America, and some pricing pressure. Furthermore, the hoped-for bump from segments outside of technology has not come to fruition: except for two vendors, all other vendors remain highly dependent on the tech sector for 70% to 90% of their revenue.

However, incremental growth is coming from three sources:

1. Markets like India, Japan and the Middle East region, where CS is maturing as a strategy
2. Newer and lower-cost CS solutions targeting small and midsize buyers; they represent smaller deal sizes
3. Portfolio vendors like HubSpot and Certinia that are selling CS solutions to their existing customer base and targeting buying centers with predictable and sizable budgets such as the support, services and PMO functions.

The Largest Vendor Earns Over Four Times More Revenue Than Its Nearest Competitors

Based on Gartner analysis and vendor-supplied, as well as public, revenue data, the market distribution is as follows:

- One vendor in this Magic Quadrant continues to draw well in excess of \$200 million annual revenue directly from CSM solutions
- The next closest vendors range from \$30 million to \$40 million in revenue
- The remaining vendors typically generate \$5 million to \$6 million per annum.

All evaluated vendors in this Magic Quadrant are privately held except for HubSpot. Buyers must closely assess the stability of the leadership team, request customer satisfaction scores and retention rates, and validate investment in an AI roadmap, to compensate for the lack of visibility into the vendors' financial health.

AI Capabilities Are Driving Mergers and Acquisitions

Many acquisitions are focused on acquiring AI capabilities and talent. They include Gainsight's acquisitions of Staircase AI (in 2024) and UpdateAI (in 2025), HubSpot's acquisitions of Frame AI and Dashworks (both in 2025), Tontango's acquisition of Parative AI (in 2024), and ClientSuccess' acquisition of Product Signals (in 2025).

North American and Western European Markets Continue to Drive the Majority of the Revenue

North America and Western Europe still generate most of the market revenue and bigger deals. Vendor briefings indicate that larger companies in countries like India, Australia, Japan and Singapore, as well as the Middle East, are investing in CS platforms, but the number of deals remains small.

Limited Partner Ecosystems Inhibit Expansion Into New Verticals and Regions

The vendors' ability to fuel potential growth in newer regions is dependent on developing a region-specific strategy and local presence — either directly or indirectly. However, we see many small vendors continue to underinvest in channel and service partners, and very few providers have built out a robust ecosystem of third-party sales and service partners. This limits CS vendor expansion across more geographies and verticals.

CSM Platforms Are Embracing a Broader Set of Use Cases

Prominent players in this Magic Quadrant are now focused on helping companies grow revenue from existing customers, not just supporting adoption and retention. Buyers want more value from their CSM investments and CS teams are being absorbed into larger service or revenue functions. Similarly, CS motions are being adopted by project teams and customer support. This has resulted in two outcomes:

- CSM platforms are adding modules to address a broader set of use cases. For example, market leaders like Planhat are adding CRM-related capabilities.
- Vendors like HubSpot and Certinia are adding CS to their existing service product portfolios.

Some CSM Platforms Are Incorporating Advanced AI Capabilities and Autonomous Agents

Generative AI capabilities and in-app conversational AI assistants are now expected in CS platforms. That includes:

- Summarization (of account status, meetings/calls, email threads and customer survey feedback)
- Content creation (drafting customer emails, generating meeting notes and follow-up tasks)
- Generating playbook templates

Generative AI is also applied to predict churn risk or growth opportunity, recommend next best actions and detect sentiment to dynamically adjust health scores.

New advanced AI capabilities, which are offered by only a few vendors, include:

- Health signals from a broader range of customer interactions (e.g., Gainsight)
- Automated meeting summaries and follow-up (e.g., ChurnZero)
- Dynamic health scores based on customer models (e.g., Totango)
- Enrich, update and add customer contact data by prompting a large language model or bringing in an AI agent to complete those tasks (e.g., Planhat).

AI agents that operate autonomously are being planned by several market leaders. These include a renewal agent to automate renewal processes, adoption/engagement agent to prompt to the next level of use and a CS agent to scale CS without human intervention. Also, several vendors are planning to enable customers with professional services or marketplaces to either build their own or integrate third-party agents to activate within their platforms.

⊕ Evaluation Criteria Definitions

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