How Customer Success and a Focus on Value Realization Set Winning Consulting Partners Apart

A Market Study by AWS • 2026

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Abstract

Enterprise customers are changing what they buy from consulting partners. As they fund substantial Artificial Intelligence (AI) investments, the need to demonstrate returns to their Board and shareholders has become more important than ever. Most describe an unmet need: they want partners who help them realize value from those investments, and they are willing to pay more for partners who can do so. Customer Success with a focus on value realization is what makes this possible: the post-sale motion that turns technology investments into realized business outcomes through transparency and a continuous focus on value throughout delivery and beyond.

This paper presents key findings from a market study conducted by AWS in early 2026, combining a survey of 292 consulting partner decision-makers with 35 in-depth executive interviews across partners and customers. The study surfaces three findings. First, customers describe a gap in Customer Success and would pay a 10-20% premium to partners who provide a full set of leading capabilities. Second, consulting partners deliver Customer Success unevenly, sitting along a maturity spectrum from ad-hoc, decentralized practices to integrated, continuous motions. Third, the case for investment is compelling: an average return of $3.50 in gross profit over five years for every dollar invested, with returns scaling with maturity.

AWS recognizes that adapting to these shifting expectations takes investment, time, and a clear plan. Through the Business Value Realization (BVR) Motion, AWS is helping partners build, evolve, and scale their Customer Success capabilities to meet what their customers are increasingly asking for.

HIGHLIGHTED FINDINGS

The numbers that anchor this paper:

> **Customers describe an unmet need for Customer Success.** Customers conveyed requiring deeper value realization support from their partners, particularly around use case envisioning, value mapping, and post-launch outcome tracking.

> **Willingness-to-pay for Customer Success as a premium service.** Customers would pay 10-20% more for engagements that include a full set of proven Customer Success capabilities, because they reduce execution risk.

> **80% of customers interviewed report a shift toward outcome-based engagement terms.** Customers describe moving away from time-and-materials and milestone-based contracts toward value-based and outcome-tied commercial models, particularly in the context of AI investments.

Four partner archetypes describe the Customer Success maturity spectrum. The study identified four categories of partners ranging from early to most advanced Customer Success: Implementation Boutiques, Emerging Customer Success Practitioners, Focused Transformation Advisors, and End-to-End (E2E) Transformation Leaders.

$3.50 in gross profit for every $1 invested. Average return reported by partners who have invested in Customer Success capabilities, measured cumulatively over a 5-year horizon.

Returns scale with Partner's Customer Success maturity. Best-in-class Customer Success partners (E2E Transformation Leaders) report 3.9 times return over five years, compared with 2.7 times for partners in early stages of Customer Success maturity (Emerging Customer Success Practitioners).

Customer expectations are shifting, and partners that adapt will win in the new competitive landscape

Consulting partners have long organized their engagements around a familiar model: scope the technical work, deliver against a statement of work, and bill by milestone or by the hour. This model still describes a large share of work delivered today. Our research, however, points to a clear shift in what enterprise customers are asking for.

Customers increasingly expect partners to share accountability for business outcomes, not only for the completion of a defined technical scope. They want partners who think like owners of their business: partners who proactively identify ways to optimize impact, suggest innovative paths, and stay invested in their success long after implementation is complete.

AI is accelerating this shift in two ways. First, enterprise customers are making substantial AI investments as part of their broader transformation agenda and face significant pressure to demonstrate returns. That pressure flows through to their partners: customers want partners who can convert AI investments into measurable business impact, not partners who simply deploy AI tools into production. Second, AI compresses the technical effort required for many implementation tasks, reducing the share of engagement value tied to pure technical execution.

> *"We expect AI to compress the technical side. We look to SI partners as advisory and strategic partners because we don't have that pillar in-house."*
>
> CIO, large discount retailer

From customer interviews, we learned customers want partners who can deliver a comprehensive set of capabilities to help them achieve value realization and ROI. They want partners who connect value targets mapped to use cases to the people and process changes needed to deliver on them, driven by continuous tracking and optimization across the entire Customer Success engagement and beyond. This rests on three core capabilities:

1. **Value mapping:** helping customers envision the use cases that will accelerate their AI transformation vision and deliver business impact, identifying the specific outcomes they are aiming to achieve, and translating them into measurable targets.
2. **Adoption and change management:** ensuring the people, process, and organizational readiness needed to optimize enterprise usage and impact from the new capabilities that are in place.
3. **Monitoring and business value determination:** continuously tracking outcomes after go-live, adjusting as needed for further optimization, and demonstrating the value and returns on investment (ROI) the customer is realizing.

Collectively, these three practices distinguish partners who deliver implementations from partners who drive business impact.

The findings that follow are drawn on a study conducted by AWS in early 2026. Study methodology and respondent demographics are detailed in the appendix at the end of this paper.

Customers want outcomes, not just implementation, and they are looking for partners to take more ownership of their success and outcomes

From customer interviews, we also learned customers are shifting how they engage. 80% of customers interviewed reported moving toward value-based, outcome-tied commercial models and away from time-and-materials and milestone-based contracts. Some are doing so in response to internal cost pressure. Others are funding ambitious AI agendas and need to ensure those investments translate into business results.

> *"We are looking for more outcome-based models, so the provider has skin in the game. We no longer rely on models where a PO is sent out, and the supplier gets invoices paid irrespective of success or failure."*
>
> Director of IT Strategy, major automotive company

> *"Over the past three years we've absolutely pushed toward value-based engagements. I think we're going to see hopefully an acceleration of the time to value. We'll be able to build capabilities using AI faster."*
>
> CIO, large insurance company

Customer Success is becoming a prerequisite for partners

Several customers described screening partners out of consideration when Customer Success capabilities were absent from the proposal. Proposals that did not include value mapping, change management, and outcome tracking did not advance to pricing discussions.

> *"The partners that didn't include change management, value mapping, and metrics, we threw out their responses to the RFP right away."*
>
> VP of Informatics, regional healthcare system

When Customer Success capabilities are provided and credibly presented, customers will pay more. The willingness-to-pay premium ranges from 10-20% above the baseline price for an implementation-only engagement of similar scope. The driver is risk reduction: a partner that contractually and operationally commits to value realization absorbs uncertainty that would otherwise sit with the customer.

> *"I would easily pay up to 20% more. If they can give me all those outcomes, value mapping, change management, outcome tracking, I'm paying more but I have less risk."*
>
> Director of IT, enterprise software company

75% of customers interviewed reported achieving better business outcomes when Customer Success capabilities were embedded in their partner engagements, and many described looking for deeper Customer Success support than what their partners currently provide. As these expectations move from preference to procurement criteria, partners who have already built and embedded these capabilities are positioned to win. Those who have yet to commit could find it challenging to maintain their competitive standing.

Partners operate across varying levels of Customer Success maturity

Currently, consulting partners deliver Customer Success across a wide spectrum. Some run it as a continuous, dedicated function with its own ownership and revenue targets; others treat it as an ad-hoc capability and only surface it when a customer asks. Most fall somewhere between.

The four partner archetypes of Customer Success

Four partner archetypes emerged from our study, structured by the maturity of their Customer Success delivery: Implementation Boutiques, Emerging Customer Success Practitioners, Focused Transformation Advisors, and E2E Transformation Leaders. The archetypes describe a continuum rather than discrete categories; most partners have elements of more than one archetype and will move along the spectrum as their Customer Success capabilities mature.

EXHIBIT 1

Customer Success archetypes across the partner landscape

Degree of CS maturity

Partner archetypes	Implementation Boutiques	Emerging CS Practitioners	Focused Transformation Advisors	E2E Transformation Leaders
CS maturity today	• Minimal formal CS capabilities • Engagements focus on implementation delivery • Post-go-live adoption and value realization largely left to the customer (or another strategic partner)	• Early-stage CS maturity; capabilities exist but are unstructured / decentralized • CS is often "available if asked," not a core growth lever • Basic CS motions are starting to take shape	• Established CS capabilities, deployed selectively at key moments (e.g., launch) • CS is valued and resourced, but not run as a continuous value motion • Strong at targeted adoption support and outcomes messaging	• Highly mature • CS operates as a revenue-generating function with clear ownership and targets • Formal operating model, playbooks, and deep CS capabilities delivered continuously
Typical CS org. structure	No structure present due to lack of CS capabilities	De-centralized; CS ascribed to delivery/technical roles (e.g., Solution Architect)	Centralized with dedicated roles / resources	Capability focused, agnostic of role; can be formalized in roles or in firms' "DNA"
Relative value from BVRP	Transform current CS capabilities			Augment current CS capabilities

Implementation Boutiques focus on technical execution and rely on other partners or the customer to handle adoption and value realization. Emerging Customer Success Practitioners have begun building capabilities but deliver them inconsistently, often only when prompted. Focused Transformation Advisors have established capabilities and resources deliberately but tend to deploy Customer Success at critical junctures of the engagement rather than continuously. E2E Transformation Leaders run Customer Success as an integrated, continuous function with formal operating models, dedicated ownership, and revenue accountability.

How the three core capabilities are delivered across the spectrum

EXHIBIT 2

Customer Success maturity matrix

Degree of CS maturity →

Core Customer Success capabilities in partners	Implementation Boutiques	Emerging CS Practitioners	Focused Transformation Advisors	E2E Transformation Leaders
1 Value mapping and opportunity identification				
a Establish baseline processes and (current-state) performance metrics	✓	✓	✓	✓
b Define future-state processes & success metrics (what "good" looks like)	◑	✓	✓	✓
c Link metrics to customer business outcomes (e.g., cost, revenue, etc.)	✗	◑	✓	✓
d Focus on innovation and value creation continuously (oppt'ys beyond SOW)	✗	✗	✗	✓
2 Adoption, training, and change management				
a Steer change management and adoption through dedicated personnel and standardized tooling	✗	✗	✓	✓
b Deliver persona-based training (incl. role-specific guides and job aids)	✗	◑	✓	✓
c Create user-facing comms and reinforcement motions (champions, FAQ)	✗	◑	✓	✓
d Establish support + governance model (tiering, SLAs, handoffs, roles)	✗	◑	✓	✓
3 Monitoring and business value determination				
a Set up dashboards/telemetry to monitor adoption, operational performance, and business outcome KPIs post-go-live	✗	✗	✓	✓
b Engage executive / senior stakeholders regularly to build credibility and align on progress to target outcomes (e.g. defined meeting cadence, such as WBRs/QBRs, to review performance)	✗	✗	✓	✓
c Identify gaps (adoption, performance, value) and execute an action plan to course-correct and optimize	✗	✗	◑	✓

Legend

✓ Capability present and consistently applied ◑ Capability somewhat present and inconsistently applied ✗ Capability not present

Value Mapping and Opportunity Identification

Emerging Customer Success Practitioners approach value mapping as a pre-sales activity, done at the start of an engagement to identify stakeholders and goals, then largely set aside as delivery progresses. Focused Transformation Advisors incorporate value mapping as the foundation within the scope of their current engagement only. E2E Transformation Leaders embed value mapping across every phase of the engagement and beyond, revisiting and tracking value creation continuously as conditions change.

> *"[Value mapping] is in the scoping and the pre-sales and it's going to be working and identifying the stakeholders and what their goals are for their business."*
>
> CTO, cloud services firm (Emerging Customer Success Practitioner)

> *"We embed this across all of our engagements and teams, it's not just at the end, it's all the way through the project."*
>
> Director, global consulting firm (End-to-End Transformation Leader)

The structural difference between value mapping as a one-time activity versus a continuous practice separates partners who deliver implementations from partners who earn customers' trust and deliver business outcomes.

Adoption, Training, and Change Management

Emerging Customer Success Practitioners have elements of the approach and capabilities to drive change management, but they do not deploy them proactively or at scale. Focused Transformation Advisors and E2E Transformation Leaders view change management as critical to driving value realization, with both incorporating their full capabilities in customer engagements.

Monitoring and Business Value Determination

Emerging Customer Success Practitioners are focused on technology implementations; setting up tooling, cadence, and governance to track and optimize value realization is typically excluded from their engagement scope. Focused Transformation Advisors activate value tracking throughout their engagements but tend not to incorporate a continuous approach to course-correct or optimize value creation. They track and measure value based on what was agreed in the SOW. E2E Transformation Leaders adopt a continuous motion to optimize value creation, even when conditions deviate from the original business case. They continuously revisit value and progress, refining approach and plan as needed to help customers optimize outcomes.

How partners progress along the Customer Success maturity spectrum

Partners who had advanced from Emerging Customer Success Practitioner to Focused Transformation Advisor, or from Focused Transformation Advisor to E2E Transformation Leader, described a similar progression: building genuinely new capabilities while changing how existing capabilities are organized, resourced, and held accountable. Three transitions define this journey:

1. **From decentralized to dedicated.** Emerging Customer Success Practitioners typically have Customer Success activities scattered across delivery and technical roles, a Solution Architect handles some elements of value mapping; a Project Manager drives some aspects of the adoption work. Transitioning from a decentralized to dedicated model requires partners to consolidate these key activities into dedicated Customer Success roles with clear ownership: from "available if asked" to "standard offering."
2. **From selective to continuous.** Focused Transformation Advisors deploy Customer Success at specific moments, typically scoping, launch readiness, and post-go-live reviews. Transitioning into continuous motion means Customer Success capabilities are delivered throughout the engagement. For instance, value mappings are revisited as conditions change rather than completed once and set aside.
3. **From cost center to revenue function.** E2E Transformation Leaders treat Customer Success as a revenue-generating function with its own targets, P&L visibility, and commercial accountability. This transition requires executive sponsorship and organizational alignment, given the degree of change to the partner's operating model and the incentive structure.

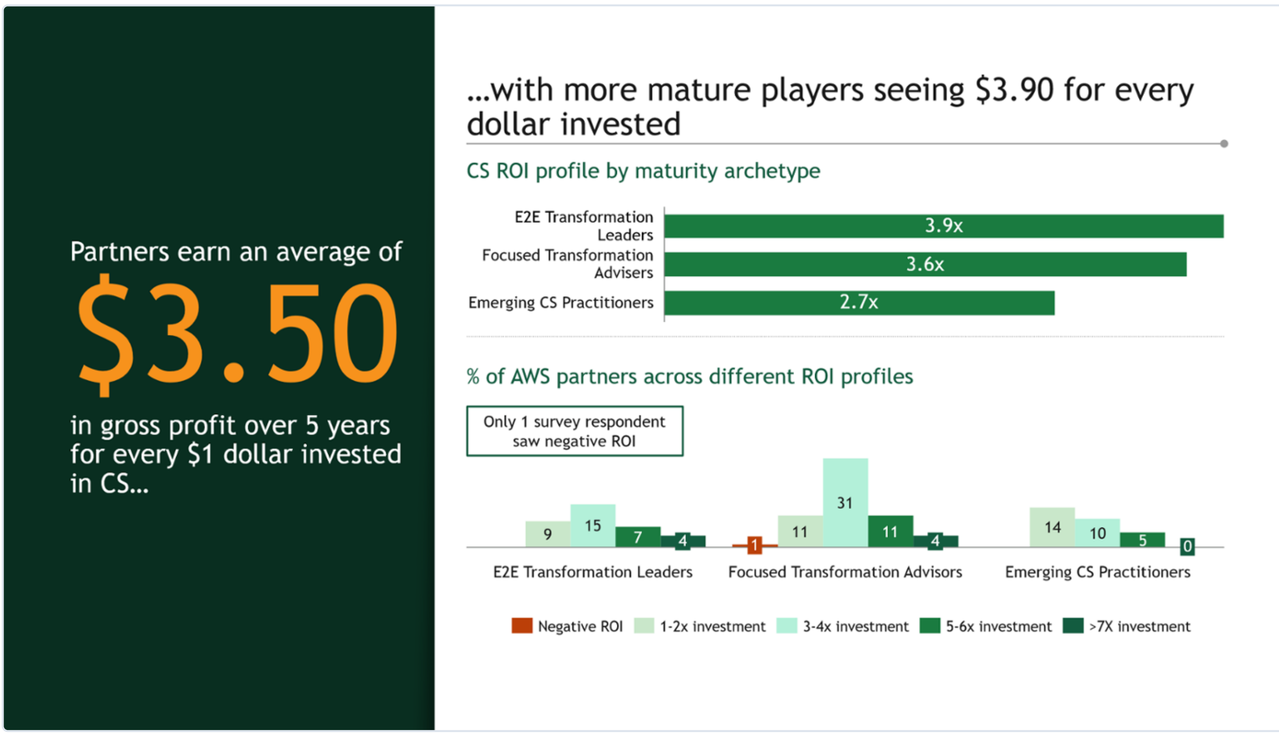
While building and scaling Customer Success capabilities require tangible technical and operational investment, partners highlighted changes to their organization, operating model, success measurements, and incentive alignment as the more demanding part of the transition. Customer Success maturity progression, at its core, is an operating model question, and partners who approach it with this mindset will move faster than those who treat it as a pure capability-building exercise.

The business case is compelling: $3.50 back on every dollar, with payback in under two years

Partners who invest in Customer Success capabilities to address their customers' value realization needs also realize positive ROI, with an average reported return of $3.50 in gross profit over five years for every dollar invested.

EXHIBIT 3

The economics of Customer Success return for partners



The level of return varies across partner archetypes. E2E Transformation Leaders, on average, attain $3.90 in gross profit over the same period, driven by higher revenue growth (10-11% increase over three years) and gross project margin expansion (6-7 percentage point increase over three years) from delivering higher value work across value mapping, adoption, training, change management, and continuous monitoring of business value. This positions them as strategic advisors across their customers' AI transformation agenda, creating more deal opportunities and higher future growth.

> *"The most margin is in Customer Success advisory, followed by functional work and then technical work. Customer Success advisory is the most strategic part and that's where a ton of money is involved."*
>
> Partner, global consulting firm (End-to-End Transformation Leader)

Emerging Customer Success Practitioners see a lower return at $2.70 in gross profit for every dollar invested. This stems from Customer Success capabilities not being centralized or structured across the organization, leading partners to deliver higher-value Customer Success work only when requested by customers. As a result, these partners realize lower revenue growth (5-6% increase over three years) and gross project margin expansion (2-3 percentage point increase over three years).

EXHIBIT 4

Revenue growth impact from Customer Success investment, by partner archetype

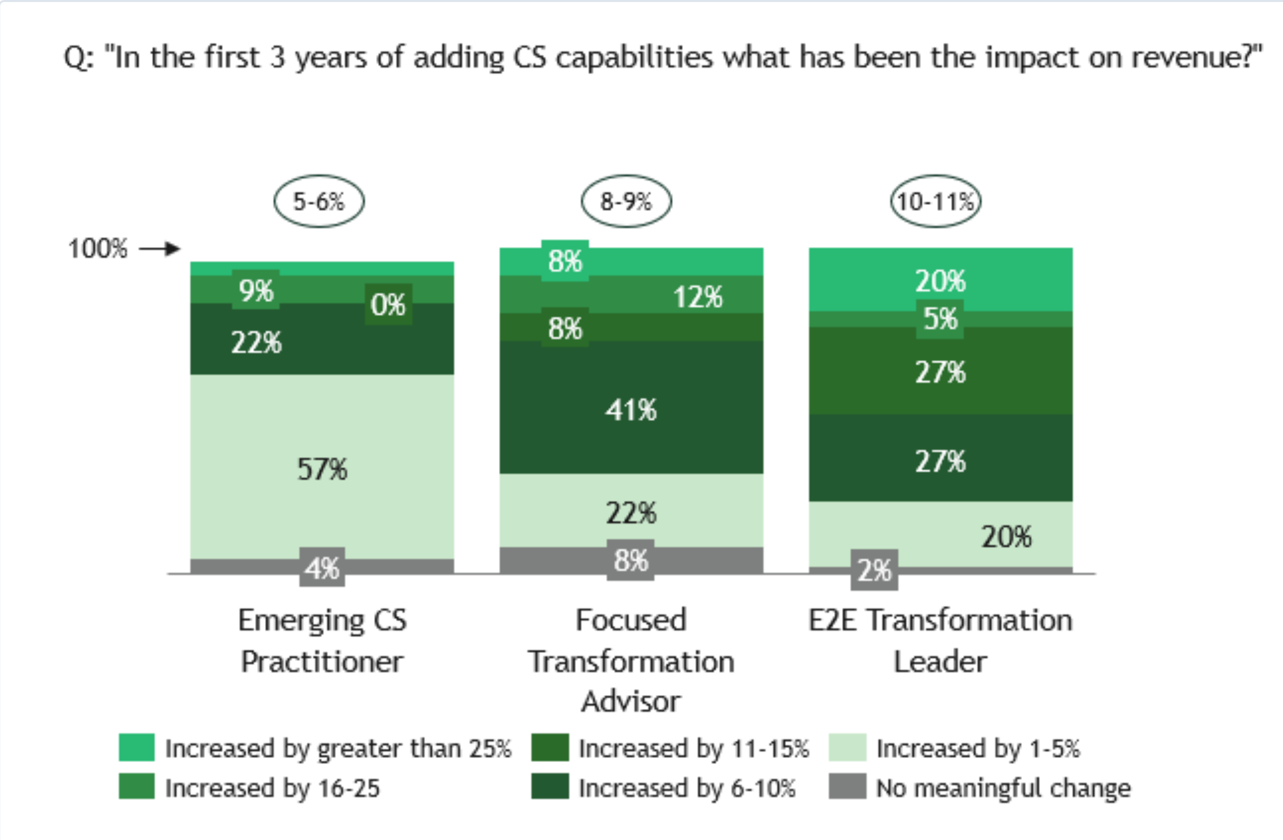
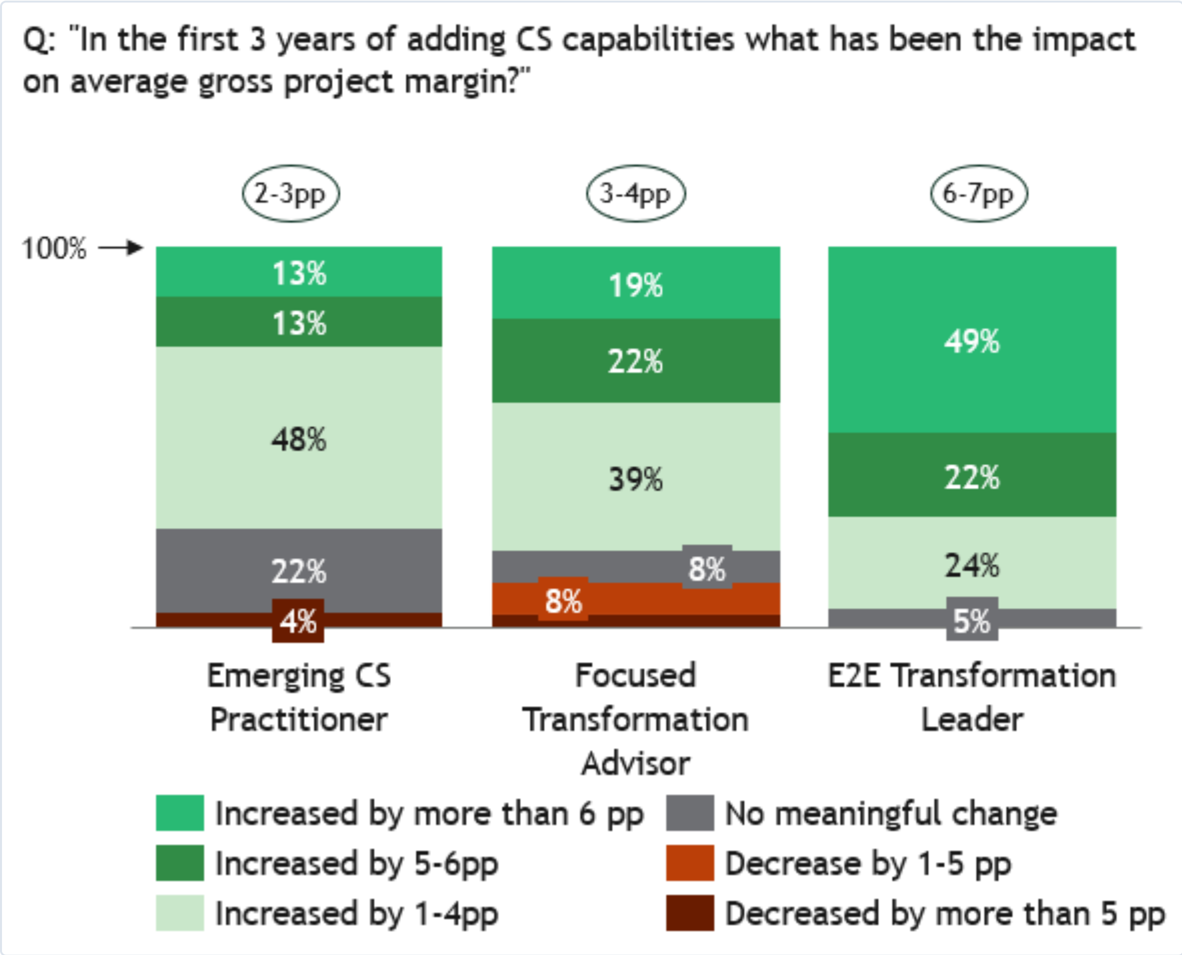


EXHIBIT 5

Gross project margin impact from Customer Success Investment, by partner archetypes



45% of partners reach breakeven on their Customer Success investment within the first year, and 79% within two years.

In their first year, partners report more than 60% of Customer Success investment going to people, technology, and training, the three categories that build durable capability. Mature partners report higher initial investment but a declining cost to serve in years two and three as standardization, repeatable playbooks, and shared tooling reduce unit cost. Emerging Customer Success Practitioners tend to spend the least upfront, requiring them to maintain a similar level of Customer Success investment each year.

How AWS can help

AWS is committed to our partners' success. We recognize that customer expectations are shifting, accelerated by AI disruption, and we understand it takes investment, time, and a clear strategy to build the needed capabilities. The Business Value Realization (BVR) Motion is AWS's commitment to working alongside partners as they build, scale, and refine the Customer Success capabilities their customers are increasingly asking for.

BVR is designed to meet partners where they are and help them progress, from standing up foundational practices of value mapping and outcome tracking to formalizing Customer Success as a continuous motion or scaling an existing function into a revenue-generating engine. As a BVR Motion partner, you will have access to the Partner Value Realization Toolkit, a set of market-proven assets and accelerators including domain and industry benchmarks, customer success plans, business case tools, and change management and governance frameworks to support Customer Success engagements end to end. BVR Motion partners will also have access to role-based training, Skill Builder courses, industry webinars, and community engagements through the Partner Business Value Realization Academy.

Partners interested in engaging with the BVR Motion can connect with their AWS Partner Development Manager to learn more.

Conclusion: From insight to action

Customers are redefining what they buy from consulting partners, particularly as they fund substantial AI investments. Partners are responding at varying speeds, with the most mature already capturing the commercial benefit. The economics support the investment: the return is tangible, payback is reachable within most partner planning horizons, and growth opportunities rise with Customer Success maturity.

For partner leaders, three concrete actions are worth taking before the next planning cycle:

ACTION 1

Assess your current Customer Success maturity.

Reference the four archetypes as a starting point for your self-assessment. Where do your current Customer Success capabilities sit, decentralized and ad-hoc, established but selectively deployed, or operating as a continuous, revenue-generating function?

ACTION 2

Quantify your gap to the next archetype.

Commercial rewards are driven by Customer Success maturity progression. Identify the one transition area that will have the largest commercial impact for your organization and estimate what it will take to launch and scale.

ACTION 3

Engage AWS.

If you are an AWS partner, contact your dedicated Partner Development Manager to begin a Business Value Realization (BVR) Motion conversation. Come prepared with your self-assessment results and transition priorities.

In a market where delivery is becoming table stakes, Customer Success grounded in value realization is how winning consulting partners will differentiate themselves. AWS is committed to helping its partners build that differentiation and thrive in the AI-driven market landscape.

Appendix: Methodology and Respondent Demographics

The findings in this paper draw on a study conducted by AWS's Business Value Realization (BVR) Motion team in early 2026, combining a quantitative survey of 292 consulting partner decision-makers globally with 35 in-depth executive interviews with partner and customer leadership.

Partner survey respondents represent Global Systems Integrators, Systems Integrators, and business consulting firms across North America, Europe, Asia, and Latin America.

Interviews included partner executives (N = 20) from leading global technology services and consulting firms, alongside CIOs, CISOs, and senior IT leaders from enterprise organizations (N = 15) across financial services, insurance, automotive, consumer electronics, healthcare, retail, and telecommunications.

RESPONDENT GEOGRAPHY