

Build vs. Buy CSM Live Call Guide

A reference for navigating the conversation in real time

STEP 0 — BEFORE YOU RESPOND



ASK THIS FIRST — EVERY TIME

"When you say build — are you thinking about an internal engineering project, or are you thinking about using AI tools to approximate this?"

THE THREE TYPES OF BUILD

TYPE 01

Classic engineering build

Internal team building a homegrown CS tool from scratch. Lead with the technical track first — make the invisible visible.

TYPE 02

AI-assisted "vibe coding"

V1 built in weeks with AI tools. V1 working is the problem — maintenance, ownership, and scaling are just beginning.

TYPE 03

AI + CRM substitution

Pointing Claude or ChatGPT at Salesforce and assuming it replaces a purpose-built platform. Needs its own response.

THE CONVERSATION IN FOUR MOVES

1

Identify the type of build

Ask the clarifying question before you respond to anything. Which of the three conversations are you in?

2

Name the two-track structure

"I want to walk you through two lenses — the technical reality and the financial reality — and show you how they connect. Most teams I talk to are only fully seeing one side."

3

Make the invisible visible

Walk through what the build actually requires, starting with the track the customer is underweighting.

4

Connect the tracks

Show how technical and financial realities compound each other. Every technical risk has a direct financial shadow.

LINES THAT LAND

"The savings calculation only works if you value your team's time at zero. The build path looks cheaper on paper because it hides its costs inside your engineering team's calendar instead of on an invoice."

"A customer spreadsheet that doesn't include these categories isn't wrong by a little. It's wrong by a multiple."

"An AI tool is an intelligence layer. A CS platform is the infrastructure that makes that intelligence reliable, persistent, actionable, and accountable across an entire team."

"'Connecting to Salesforce' is the beginning of the sentence, not the end of it."

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Hidden costs · Discovery questions · AI substitution gaps

HIDDEN COSTS — KEY NUMBERS

- 15–20%** **Ongoing maintenance**
Of initial build cost. Every year. A \$300K build = \$45–60K/yr before any new features.

- 78–80%** **Post-launch lifetime cost**
Of total software cost happens after launch. The spreadsheet rarely includes any of it.

- \$200K+** **SOC 2 Type II**
\$50–200K to initiate. \$20–100K/yr to maintain. Non-negotiable for enterprise buyers.

- 6–12mo** **Productivity gap**
No health scores, no playbooks, no risk alerts. Real ARR at risk — not just a PM issue.

- 29%** **Large builds succeed**
35% are abandoned entirely. Building is a bet on being in the top third with no structural reason to believe you will be.

- \$2.5K** **AI token cost at scale**
500 accounts × 50K tokens = ~\$2,000–2,500/mo in API fees alone. Before RAG, infra, or engineering.

AI + CRM SUBSTITUTION — 7 GAPS

- **Memory**
No persistent memory between sessions. Every call starts from zero — no account history, no prior flags.

- **Data foundation**
Connecting to multiple systems doesn't normalise them. Different schemas, identifiers, and structures — the AI reconciles every time.

- **Proactive alerting**
Timers fire on schedule, not when something changes. A health drop on Tuesday waits until Friday's run.

- **Workflow & accountability**
AI produces output — not assigned tasks, due dates, or escalation rules. 10 CSMs, 10 different responses.

- **Team visibility**
Sessions are individual and session-bound. No portfolio view, no audit trail, no shared risk view for leadership.

- **CS intelligence**
General-purpose LLMs don't ship knowing what a health score or renewal motion looks like. You own the training — and re-training when models update.

- **Cost structure**
No contractual ceiling on token pricing. Real-world usage at scale is consistently higher than initial estimates.

DISCOVERY QUESTIONS BY STAKEHOLDER

TECHNICAL — CTO / VP ENG

- " Who owns keeping integrations working when any upstream system changes its API?

- " What happens when the engineer who builds this moves to a different project or leaves?

- " Have you modelled ongoing maintenance as a percentage of initial build — or just the build cost?

FINANCIAL — CFO / VP FINANCE

- " Has your model included the annual maintenance run-rate, or just the initial build investment?

- " Have you factored in the compliance path — SOC 2 — and what it costs to initiate and maintain?

- " What's the ARR at risk during the 6–12 months without health scores or risk alerts?

AI OBJECTION — ANY STAKEHOLDER

- " When CSMs need to know what happened with an account three weeks ago, how does the AI surface that across sessions?

- " If a customer's health drops on a Tuesday, what's the process to surface that to the right CSM before Friday?

- " If ten CSMs run the same prompt today, what ensures they all take the same action?