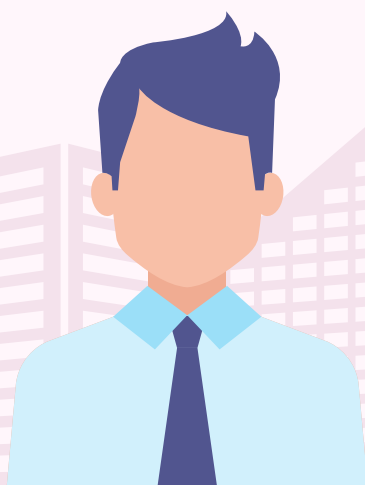
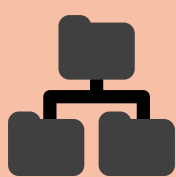


Practical actions that transform you from a Rookie to Savvy CSM.



Instead of..

Ad hoc management of clients prioritising dousing fires and reacting to complaints



Setting up meetings in reaction to events



Writing the same mail over and over again



Getting an SF link in the name of handover from sales



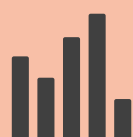
Engaging with clients at product level



Long comatose trainings delivered once a quarter



Helplessly complaining about product and process issues



Do this...

1. Make a list of accounts you hold
2. Segment them based on Revenue, use case, vertical etc
3. Establish clear service standards for each segment at every stage of customer lifecycle
4. Don't forget to get a sign off on it from your manager!

Develop a cadence of meetings and check ins aligned with

1. Stage of customer lifecycle e.g onboarding, upcoming renewal etc
2. Important developments in the client's business e.g. joining of a new leader or change in business process

Establish communication templates for recurring events such as:

1. Welcoming clients.
2. Sharing changes in SPOC and escalation contacts
3. Answers to FAQs
4. Renewal Reminders etc.

Proactively get sales to share:

1. Details of the client's company
2. Reason for purchasing the product
3. Details of key stakeholders

(A simple google search will give you a checklist of handover questions)

Engage with clients at business level

1. Understand their business model, how they make money, their competition
2. Know their business priorities, decision makers and influencers
3. Give your stakeholders the gift of insight from the outside
4. Help them connect with potential partners and clients

1. Develop training modules customised to the client's use case and vertical
2. Support with frequent bite sized information that connects users to the product e.g Tip of the day

Create Context

1. Develop a business case. It is as simple as Quantity (no. of clients impacted) X Price (their contract value)
2. Keep your managers and cross functional teams updated with basic metrics (usage, meetings, health metrics). And share issues in context of this background

Need help turning these tips into action?
Explore my upcoming [Customer Success Fundamentals Course](#)