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

Instead of..	Do this...
Ad hoc management of clients prioritising dousing fires and reacting to complaints	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!
Setting up meetings in reaction to events	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
Writing the same mail over and over again	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.
Getting an SF link in the name of handover from sales	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)
Engaging with clients at product level	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
Long comatose trainings delivered once a quarter	1. Develop training modules customised to the client's use case and vertical 2. Support with frequent byte sized information that connects users to the product e.g Tip of the day
Helplessly complaining about product and process issues	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