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Module One:
Customer Success Fundamentals
Workbook Two

- The CSM exists to create value for their own company
- The CSM's primary task is to help customers attain measurable value from using their company's products and services
- The CSM is a subject matter expert in how to adopt, use and realize value from their company's products and services
- The CSM understands the customer's business
- The CSM is a researcher and an analyst
- The CSM is a consultant and an adviser
- The CSM is an educator
- The CSM is a communicator
- The CSM is an influencer and an enabler
- The CSM is a planner and a project manager
- The CSM is a problem solver
- The CSM is a pragmatist
- The CSM proactively seeks further sales opportunities
- The CSM should do as little as possible - ideally nothing at all



Welcome to Module One, Workbook Two. As you know, Module One is all about understanding Customer Success Fundamentals and in this second workbook we will be reviewing the 14 Tenets (or principles) of Customer Success Management. A summary of these tenets can be found in Chapter One of the *Practical Customer Success Management* book. The 14 Tenets of Customer Success Management are shown here in the slide, and we will deal with each one of them in turn, spending more time on some of them than others, starting with Tenet 1: The CSM exists to create value for their own company, and ending with Tenet 14: The CSM should do as little as possible - ideally nothing at all

- The CSM exists to create value for their own company
- The CSM's primary task is to help customers attain measurable value from using their company's products and services
- The CSM is a subject matter expert in how to adopt, use and realize value from their company's products and services
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and...

- The CSM should do as little as possible - ideally nothing at all

Tenet 1. The CSM Exists to Create Value for Their Own Company

- The principal reason for the existence of a CS team is to increase revenue growth and profitability
- Senior management invests in CS in order to attain the greatest possible return on investment
- CSM should ask themselves “Is this the best way to create value for my customer?” and “Is this the best way to create value for my own company?”



The principal – indeed arguably the sole – reason for the existence of a customer success team is to increase revenue growth and profitability for the company.

The bottom line is this: running a customer success management team costs money in staff and equipment and takes up valuable management time to run. Those precious resources of time, money and equipment are all finite in size, and could potentially be deployed in other ways – for example by employing more salespeople, by running a social media marketing campaign, or by providing further training for the customer support team. Why would the senior management team decide instead to invest those resources on funding and managing a customer success department? The answer has to be because they believe that doing so is in the best interests of the company because it brings back the greatest possible return on investment by doing so.

So here’s the thing: There are many, many activities that CSMs can choose to get involved in, but to my mind each CSM should be constantly in mind of Tenet 1: *The CSM exists to create value for their own company* and should be continually asking themselves not just “Is what I am doing the best way to create value for my customer?” but also “Is what I am doing the best use of my time in terms of creating value for my own company?”. Both questions are important. Some activities may generate value for the customer, but not the for the CSM’s company. Other tasks might generate value for the CSM’s company, but not for the customer. There is no simple answer, rather it’s up to the CSM to determine whether each action is the *right* use of their time and efforts, given the needs of both companies and the unique circumstances of the situation they happen to be in.

Tenet 2. The CSM's Primary Task is to Help Customers Attain Measurable Value from Using Their Company's Products and Services

- CSMs are principally interested in helping customers attain success by using their products and services
- Customer Experience covers both the journey and the destination, whereas Customer Success focuses just on the outcomes
- CSMs primary task is that of helping customers attain their outcomes



Customer success managers are in the business of helping customers to be successful. It's as simple as that. To unpack it a little bit further, I would also say that the CSM is principally (though arguably not entirely) interested in helping customers attain their success through using the products and services they have purchased from the CSM's company. Why? Because if the customer sees that they are getting value from their purchases then they will continue to make those purchases. Again it really is as simple as that.

Not everyone in the world of Customer Success is in agreement as to either what the Customer Success Manager should do or for that matter why they should be doing those things. I have seen and heard a variety of explanations and even formulae that try to explain customer success in other ways. But to me all other explanations I have heard either fall short of the critical concept of helping customers to succeed or add in a range of other customer experience related objectives.

Why is customer experience not a part of customer success? Actually it's the other way around – what customers experience is twofold; firstly they experience their journey to achieving their goal and then (hopefully) they experience their achievement of the goal itself. Customer Experience therefore covers both the journey and the destination, whereas Customer Success focuses just on the outcomes – on successfully arriving at the destination– which means helping to make sure that customers maximize the value they get from purchasing and using the CSM's company's products and services, and also of ensuring that not only do customers get this value but they are able to measure it and report it to their business decision makers so that the return on investment becomes known.

Tenet 3. The CSM is a Subject Matter Expert in how to Adopt, Use and Realize Value from their Company's Products and Services

- It is essential that CSMs understand how to get their products and services onboarded, adopted and utilized
- CSMs therefore need at least a basic understanding of their company's products and services
- CSMs should be specialist experts in how to adopt and use these products and services to generate value, and how to measure that value as it is generated



I was reading some research that was conducted recently by a company that asked its customers what they valued most about that company's customer success managers. The customers responded that one of the most valuable things about their CSMs was their subject matter expertise in the CSM's company's products and services. Some people expressed surprise at this, their thinking being that what customers wanted *less* of was a focus on the selling company's products and services and instead what they wanted *more* of was a focus on their *own* company and its specific vision, strategy, initiative, needs, problems and requirements. It did not surprise me however, and that is why I have put this expertise as number three in my list of 14 CSM Tenets.

It's not that it isn't important for CSMs to understand their customers' businesses – it definitely *is* important and we will be discussing just exactly that in Tenet 4 – it's that customers do already know their own business very well indeed, what they *don't* already know but need to know is how to get the products and services they have purchased from the CSM's company onboarded, adopted and fully utilized so that they start generating business outcomes from them. This does of course require an understanding of the customer's own business because this is the context in which those products and services will be onboarded, adopted and utilized. But it also requires an in depth understanding of the products and services themselves. It's important to clarify here what I mean by product or service knowledge. CSMs do need at least a basic understanding of the product or service itself ie what it is, what it does and how it does it, etc. However what they also need, and what they should be specialist experts in, is in how to *adopt and use* those products and services to generate value, and how to measure that value as it is generated. This is the specialist knowledge that customers want to be able to turn to their CSMs for.

Tenet 4. The CSM Understands the Customer's Business

- Why businesses exist and who they generate value for
- How businesses are managed and who is involved in their management
- How business strategy is formulated and actioned
- The relationship between the business and its customers
- How business capabilities combine to generate business outcomes
- The role of business finance and the basics of financial decision making
- How businesses strive to remain competitive in a changing world

If the CSM wants to help customers they have to *understand* those customers, and in particular if the CSM wants to help the customer attain its desired *business* outcomes then the CSM will need to understand that customer from a business perspective.

This first of all means that the CSM must have a good general background understanding of what businesses are and how they work. *Module Two: Business Fundamentals* will help to ensure you have this background understanding. This will include things like

- Why businesses exist and who they generate value for
- How businesses are managed and who is involved in their management
- How business strategy is formulated and actioned
- The relationship between the business and its customers
- How business capabilities combine to generate business outcomes
- The role of business finance and the basics of financial decision making

and...

- How businesses strive to remain competitive in a changing world

Once you understand how businesses function in general, you can then research the specific customer and (if you're not already familiar with it) the particular industry to which the customer belongs. It is important to understand that two businesses that look pretty much the same from the outside (for example they're from within the same industry, they're about the same size and operate in similar regions and they sell similar products and services to similar customers) may be completely different on the inside.

Tenet 4. The CSM Understands the Customer's Business

Company A

- Expanding its operations into another region

Company B

- Wishes to look more attractive as an acquisition



For example Company A may just have received a large capital investment from a venture capital fund and is in the process of expanding its operations into another region and is looking to duplicate everything it currently does in its existing region within this new region, whereas Company B might be hoping to get bought out by a larger company at some stage in the next year or two and so it is busy trying to make its operations as efficient and productive as possible in order to look more attractive as an acquisition. One company has a growth strategy, the other has a profitability strategy. These two very different strategies are likely to have a profound impact on what happens within each company's business operations.

CSMs who understand this and who make sure they are well briefed on the specific nature of their customer's business are far more likely to be received well by the customer's business stakeholders and much more able to assist those business stakeholders with attaining their desired outcomes.

Tenet 5. The CSM is a Researcher and an Analyst

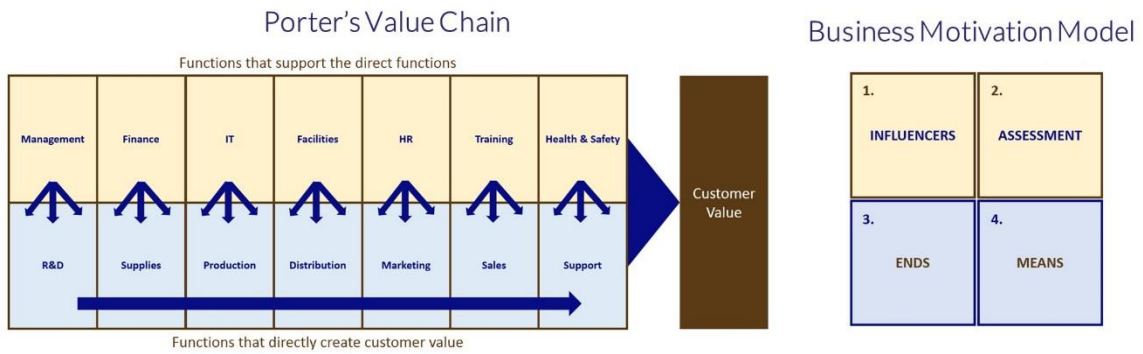
- CSMs must be able to perform research and analysis on:
 - The customer's business
 - Their own company's products and services
 - Relevant third party offerings
 - The needs of users who are impacted by the initiative
 - Options and availability of training and certification
 - KPIs for measuring progress



As we have seen from the previous tenet about understanding the customer's business, CSMs need to be good at conducting research. Of course it's not just the customer's business that CSMs must know how to research. They must also be able to perform research about their own company's products and services and potentially about third party offerings that complement their own company's offerings which the customer may also be purchasing and implementing.

In addition, the CSM will need to research into a wide range of topics, and especially into the needs of the people who will be impacted by the products and services the CSM's company is providing and/or by the wider initiative that those products and services are supporting, as well as into the options and availability of training and certification for those people. One final aspect of research that is essential for CSMs to perform is research into KPIs (or key performance indicators) for measuring progress towards outcome attainment.

Tenet 5. The CSM is a Researcher and an Analyst



Researching this information is the first step, but having *found* the information, the CSM then needs to *make sense* of it. This of course is the analysis aspect. CSMs need to be comfortable with applying the most commonly used business modelling and project management tools – such as Porter’s Value Chain and the Business Motivation Model (both of which are covered in Module Two) – to the information they research in order to make sense of it and to be able both to plan the CSM’s own activities and to report meaningful information to others.

Tenet 6. The CSM is a Consultant and an Adviser

- The CSM is a SME in onboarding, adoption and maximization of value from their products and services
- Other experts help the customer to decide what products and services they want and how best to configure them
- The CSM helps the customer to attain those outcomes through providing best practice advice and assistance to the customer's key stakeholders



The customer success manager is (or should be) an expert in their own field, and that field is the onboarding and adoption of their company's products and services, and the ability to maximize the value realized by customers from doing so. This makes the CSM a subject matter expert or SME – a subject matter expert in how customers can maximize their success from the adoption and utilization of the CSM's company's products and services.

When the CSM engages with the customer, typically the customer will already be some way down the line of selecting purchasing, customizing, installing, configuring and doing whatever else is necessary from a practical perspective to get the newly purchased products and services up and running and ready for use. Other experts such as account managers, product specialists and solutions architects may have helped the customer to decide what products and services they want and how best to configure them in order to get the desired outcomes from them.

The CSM's role is to help the customer from that point forwards in making those outcomes actually happen. That requires a lot of researching and analysing, a lot of planning and a lot of activity from the customer to turn their new acquisitions into functioning systems that are generating value. The CSM does not own the responsibility to make it happen – that's the role of one or more of the customer's key stakeholders. What the CSM owns the responsibility for is to provide consultative best practice advice and assistance to those key stakeholders to help them make their plans and actions as productive and effective as possible.

Tenet 7. The CSM is an Educator

- Education plays an important role in helping customers to onboard, adopt and realize value from their purchases
- CSMs may need to deliver training to the customer's key stakeholders and power users, but should try to avoid being drawn into a full time training role
- The focus of the CSM's training is around onboarding, adoption and ways to measure and report on value



Education plays an important role in helping customers to onboard, adopt and realize value from the products and services they have purchased. Whilst the customer success manager should make sure they do not end up in a full time training role, or get roped into delivering so much training that it doesn't leave them time to conduct their other essential duties, it is most definitely appropriate for CSMs to expect to need to deliver *some* training, especially to the customer's key stakeholders and maybe even sometimes to their power users.

The most obvious (and indeed often the most essential) aspect of education for the CSM is educating the customer's key stakeholders on the features and functions of the products and services they have purchased. Where the CSM can add more value as an educator than a standard training video, course or book could do is in using their understanding of the customer's initiative, current situation and outcome requirements to explain their company's products and services in context, rather than just generically. Helping key stakeholders to understand how individual aspects of products and services provide specific functionality that helps to deliver the specific value that that customer needs can be very powerful in generating support for adoption and in helping those key stakeholders begin to think about who within their company will be impacted by the introduction of these product and services and in what ways they will be impacted.

Alongside the products and services themselves, CSMs may well find themselves needing to educate the customer's key stakeholders around onboarding and adoption best practices, training, support and certification options for their end users and ways to measure and report on value generation.

Tenet 8. The CSM is a Communicator

- Communication skills are critical to the CSM's role
- To be a good communicator you have to be a good listener
- Active listening involves taking responsibility for ensuring the stakeholder is fully heard and fully understood
- A good technique to employ is paraphrasing what the stakeholder says back to them to validate their meaning



In terms of pure play skills I cannot think of a more important skill for customer success managers than the skill of communication. Communication is such an important component of the CSM's role, just as it is in many other roles. Time spent refining and improving one's communication skills is therefore time that is *always* well spent, no matter *how* good you may already be (or think you are) when it comes to communication.

To be a good communicator you have to be a good listener. It may be anachronistic to say it, but the old adage that states "you have two ears and one mouth so use them proportionately" makes a lot of sense. Time and again, studies show that customers regularly get frustrated because they do not feel they are being *heard* by their suppliers, and do not feel that suppliers take sufficient time to properly *understand* their needs. The art of good communication therefore starts with *listening* and that means *active listening*. What I mean by that is that the CSM takes responsibility for ensuring that the customer is given the space within the meeting or conversation to state whatever they wish or need to state without interruption. And then where necessary the CSM can check to make sure that not only have they *heard* what the customer said, but they also *understood* it. This can be done by paraphrasing back to the stakeholder what they said and asking for validation that this is correct.



CSM

“So if I understand you correctly, you need [X] to happen to [Y] quality standard by this date, and then you need [A] to happen to [B] quality standard by that date, is that correct?”

“Yes, that’s right, that’s exactly what we need!”

Key Stakeholder



For example the CSM might say “So if I understand you correctly, you need this to happen to this quality standard by this date, and then you need that to happen to that quality standard by that date, is that correct?”

Tenet 8. The CSM is a Communicator

- Benefits of Paraphrasing:
 - Validates the CSM's understanding (for the CSM's own benefit)
 - Reassures the stakeholder that they were being listened to and understood (for the stakeholder's benefit)



Paraphrasing back what someone says to you in order to validate it provides two benefits. Firstly as stated it validates our understanding for ourselves, and provides an opportunity for the stakeholder to correct any misunderstanding. Secondly it serves as a reassurance to the person speaking that the person listening actually was listening, really did hear them and understood their message.

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For example the CSM might say “So if I understand you correctly, you need this to happen to this quality standard by this date, and then you need that to happen to that quality standard by that date, is that correct?” Paraphrasing back what someone says to you in order to validate it provides two benefits. Firstly as stated it validates our understanding for ourselves, and provides an opportunity for the stakeholder to correct any misunderstanding. Secondly it serves as a reassurance to the person speaking that the person listening actually was listening, really did hear them and understood their message.

Tenet 9. The CSM is an Influencer and an Enabler

- CSMs are often in the role of assistant or adviser, rather than being the decision maker
- Being an influencer requires both communication and presentation skills *and* relationship management skills
- The CSM cannot do all the work, and so must influence and enable others to ensure everything gets done



CSMs will often find themselves in situations that require decisions to be made, action to be taken or resources to be used that are not the CSM's own responsibility but that of others. This could be in forward facing situations with customer's stakeholders, but could equally be in backward facing situations with colleagues and sometimes even out to the sides with partners of either the customer or of the CSM's company.

The point is that whatever the specifics of the situation, there will often be occasions when the CSM wants something to get done but cannot do it themselves, or when a decision is not theirs to make but they want the person making it to decide in favour of one particular direction over any other.

In these types of situations, the CSM must fall back on their influencing skills. Of course a lot of influencing comes down to having great communication and presentation skills and even to being a good educator – all things we have discussed earlier. But I would say it's more than that. It's also about great relationship making and relationship management skills. It includes the ability to form friendships and to win the trust and confidence of people of all types and from all places.

In short, the CSM could perhaps be thought of not as the person who actually *does* everything, but more as the spider in the middle of the web, enabling and influencing others as necessary to get done whatever needs to be done in a timely fashion and to the relevant standard.

Tenet 10. The CSM is a Planner and a Project Manager

- The development, implementation and management of plans is an important aspect of customer success management
- CSMs need to develop and action their own plans
- CSMs also need to provide their subject matter expertise to help develop and action a customer's plans
- Understanding basic project management techniques can be very useful for most CSMs



In customer success management plans often need to be developed, implemented and then managed through to success. These might include the CSM's plans for engaging with and maximizing the value from a specific customer, plans for onboarding the customer with new products and services, the customers' plans for adoption and utilization of the products and services they have already purchased, and plans both of the customer and the CSMs themselves to measure and report on value generation.

CSMs of course need to be able to develop, implement and manage their own plans, but on top of that one of the greatest ways in which they can help their customers is in supporting those customers in the development, implementation and management of *their* plans. This is because as we discussed earlier, the CSM is a subject matter expert in their own products and services and in particular in how to onboard, adopt and generate measurable value from those products and services. An additional area of expertise that is closely aligned to this is the CSM's knowledge and experience (gathered over time from previous, similar implementations) of what these onboarding, adoption and value realization plans should contain and how best they should be implemented and managed to maximize their chances of success. Providing assistance and advice to the customer based on their experiences of helping other customers is exactly what customer success management is all about.

The CSM does not necessarily need to have formal project management qualifications (though many CSMs *do*) but they do need to know the basics of project management, including the development of a multi-phased plan, preparing for implementation, managing people, managing tasks, measuring and reporting on activities, handling problems and dealing with risk and with change.

Tenet 11. The CSM is a Problem Solver

- Obstacles to success will need dealing with in order to move forwards towards outcome realization
- CSMs should be able to:
 - Be flexible and adaptable in their attitude
 - Think laterally and come up with creative solutions to non-straightforward situations
 - Work under pressure of deadlines and restrictions



The world is a complex place, and however skilled the CSM might be as a subject matter expert, as an educator, as communicator, as an influencer, and in developing, implementing and managing projects, things are inevitably going to *not* go according to plan from time to time. This is not due necessarily to anything having been done wrong or not being done that ought to have been done, but simply due to the amount of complexity and the level of both ambiguity and constant change that is inherent in the sorts of situations that CSMs might find themselves in.

Every organization has its own problems, and that includes both the customer's business and the CSM's own company. Even highly experienced and knowledgeable CSMs will from time to time therefore come across either completely new situations or at the very least variations of previous situations that the CSM has not experienced before and that there is no pre-existing response to.

These problems or challenges can be obstacles to success and if so they will need dealing with in order to move forwards towards outcome realization. In the military it is often said that good sergeants know how to improvise to get the problem solved and thus to get the job done. The same thing can be said for customer success managers. A good CSM will be flexible and adaptable in their attitude, will be able to think laterally in order to come up with creative solutions to non-straightforward situations, and will be able to do all of this in real time as the need arises and whilst under pressure of deadlines and resource restrictions.

Tenet 12. The CSM is a Pragmatist

- CSMs are often in situations where multiple stakeholders hold conflicting views, opinions and desires
- Pragmatism, negotiation and conflict resolution are all important skills for dealing with these types of situation
- The CSM needs to remain realistic in their outlook, regardless of the opinions or desires of stakeholders
- The CSM should ensure they do not commit themselves and others to attaining the impossible



One of the things that customer success managers say to me is that they often find themselves in a situation where they have many different stakeholders to please, but those stakeholders have conflicting views, opinions and desires about what should happen and how it should be done. Having many masters with conflicting views and opinions can be very difficult for the CSM, and perhaps within the concept of “pragmatism” that we are dealing with here we could also mention the concepts of negotiation and conflict resolution as complementary skills for the CSM also to have.

But turning back to the central theme of this tenet, which is that of the CSM as a pragmatist; the concept here is that whilst different stakeholders may come up with all sorts of ideas as to what to do, how to do those things, and what results they would like to see attained, the CSM needs to remain realistic in their outlook. I am not saying that targets should not be difficult to achieve or should not push the team’s abilities to the max in order to achieve them. What of course I *am* saying is that the CSM needs to know what that “max” is and needs to be careful not to put themselves in a position where they have either actually or effectively committed themselves and others to attaining the impossible.



Saying “no” – particularly to customers – is not easy, but sometimes it needs to be done. Of course very often the “no” does not have to be a complete “no”, rather it can be a “no we cannot do that, but what we *can* do is...” This approach only partially lets down the other party and may still get that stakeholder what they really need whilst at the same time not losing the good faith that long periods of prior relationship building have established. In summary, as a pragmatist, the CSM must know not only *when* to say “no” but *how* to say it.

Tenet 13. The CSM Proactively Seeks Further Sales Opportunities

- Companies must continue to sell to existing customers to continue to survive and prosper as a business
- CSMs may be able to spot new potential customer requirements for their company's products and services
- Regular meetings between account managers and CSMs is important



In all but perhaps a very few specialist situations, the CSM's company desires – in fact *needs* – to sell more of its products and services to its existing customers if it is going to continue to survive and prosper as a business. It costs roughly seven to nine times more to attract and sell to a new customer as it does to sell to an existing customer. Repeat business or additional sales of *other* products and services to existing customers is therefore likely to be a critical component of most companies' sales strategies.

Whilst the CSM should not be focussed on sales and remunerated by sales revenues in the same way that account managers and other sales executives might be, it *is* important that customer success managers take on board the fact that they are often in a unique and privileged position both to spot new potential customer requirements for their company's products and services and to discuss these requirements in a neutral and non-threatening way to customer stakeholders with whom they have built up solid trust relationships and who know that the CSM does not receive commissions for making sales and can therefore be more easily relied upon to give best practice and neutral advice to them.

In many companies, regular meetings between account managers and other members of the sales team and customer success managers is encouraged or even required. I am all for this for a number of reasons, one of which being the ability for both CSM and account manager to discuss the customer and share information not only about what has already happened and what has been agreed *will* happen, but also about what else *could* happen, given the situation and needs of the customer and the portfolio of products and services of the CSM's company.

Tenet 14. The CSM Should Do as Little as Possible - Ideally Nothing at all



The way I have written this final tenet or principle for CSMs to follow is of course intended to be partially humorous, however there is also more than a little truth to it as well.

Tenet 14. The CSM Should Do as Little as Possible - Ideally Nothing at all

- In the real world...
 - Customers may not fully understand their own needs
 - Customers may not buy the right products and services
 - Solutions may not be simple to install, configure, customize, manage and use
 - Customers may not know how to utilize those solutions to generate value
 - Customers may not know how to measure and report on value realization and ultimate outcomes attainment

As I explain in the book, in an ideal world (which of course does not exist) there would be no need for customer success management, because customers would properly understand their needs already and would buy the right products and services to meet those needs. Additionally, the products and services themselves would be simple to install, configure, customize, manage and use, so that the customer would be able to start to utilize those products and services to generate value with little or no outside assistance. Finally the right ways to measure and report on value realization and ultimate outcomes attainment would also be simple and obvious, so that the customer could again simply get on with doing it without any help and assistance from the company they made their purchases from.



The reality of course is that not only are all these things complicated and difficult, but they also all occur under a variety of pressures of time, resources, information gaps, lack of knowledge, limited experience and of course constant change. This being the case, the role of the CSM can be viewed as one of “the fixer” – the person who comes in to straighten everything out and ensure that everyone understands and agrees on what needs to be done and how to do it, and that everything actually *gets* done on time and to the quality necessary to ensure the customer achieves their goals.

Reflecting on your own knowledge, skills and experience

- Think about your own levels of skills, knowledge and experience as they apply to each tenet
- Determine the gaps in your capabilities
- Take proactive action to fill those gaps and become a more rounded and better quality CSM



As we went through these fourteen tenets or principles of customer success, you may have given some thought to your own levels of skills, knowledge and experience as they apply to each tenet. It is important to reflect upon our own abilities and to determine what we excel in, what we have an average capability of and where our knowledge, skill and experience gaps lie, so that we can take proactive action to fill those gaps and become a more rounded and better quality CSM.

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These fourteen tenets of customer success have been very carefully designed to cover the most critical skills and knowledge needed for successful fulfilment of the CSM's role. Whilst mastery of these fourteen tenets is not sufficient on its own to turn you into the perfect customer success manager, it *will* get you half way there.

Combining the 14 Tenets of Customer Success with the Practical CSM Framework



So what's the other half? The other half of the story is the work itself – in other words knowing what to do at each stage in a customer engagement and knowing how to do it to maximize results whilst remaining productive. This is why I have developed the Practical CSM Framework, which provides step-by-step guidance and explanations as to both *what* to do and *how* to do those things at each step in the process.



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