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Module Ten:
Putting It All Together
Workbook Two

As you already know, Module 10 is entitled "Putting it all Together", where we are taking the time to think about how everything we have been discussing throughout this training and certification program can be combined into one single coherent and holistic approach to customer success management.

Putting It All Together Video Two – Agenda

➢ Who Benefits from Customer Success Management?

➢ Common CS Traps and Pitfalls

In Workbook Two we will think about who benefits from customer success management and in what forms those benefits might take, and then we will be taking a look at some of the common traps and pitfalls that CSMs can encounter and discussing how to deal with them.

Who Benefits from Customer Success Management?

➢ The customer's organization benefits through improved onboarding and adoption of and value realization from the solutions they purchase

➢ The CSM's company benefits through a deeper understanding of and improved relationships with customers, increased renewals and increased additional sales

You will recall from the first section of Chapter 12 entitled *Who Benefits from Customer Success Management?* that both the customer initially and ultimately the CSM's own company as well are beneficiaries of customer success management. These two beneficiaries could be looked on as being direct and indirect beneficiaries respectively, in the sense that the majority of what the CSM *actually does* is directly related to benefitting the customer's organization through the processes of understanding and planning for and then actually undergoing the onboarding and adoption of and the value realization from whatever products and services they have purchased from the CSM's company. In this way, the customer gains direct benefits from this action. Meantime of course, the CSM's own company is indirectly benefitting from these actions too, through improved relations with the customer, a deeper understanding of the customer's needs and desires, and most importantly of all, a greater level of proven value returned to the customer from that company's solutions that in turn means an increased likelihood of the customer renewing services contracts and/or buying more of the same products and services and/or buying new and additional products and services.

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Module Ten: Workbook Two

Customer Success
Management as a Sales
Feature

I would suggest that this "dual benefit" or "win-win" concept of extending assistance to customers to help them achieve their outcomes and in so doing winning more business from them is one of the central themes or even "philosophies" behind customer success management. Companies who believe fully in this philosophy are likely to embrace customer success management and look to it to enhance the value of their offerings to customers and in so doing both to win more business from existing customers but also simply to *win more customers* too. How can customer success help a business to win new customers? Surely CS only kicks in *after* the solution has been sold and when the engagement reaches the stage where the customer needs to onboard and adopt that solution, right? Well yes that's true, but in fact I do think that these days customers expect much more from their chosen suppliers than just the product or service itself – especially in situations where what has been sold is a complex solution that will involve considerable effort to onboard, adopt and ultimately to generate value from, and particularly when the costs involved are considerable and the potential values returned are also considerable.

In this situation, decision makers within the customer organization will of course need to consider the various qualities of the solution itself – things like the quality of the solution's components, the level of flexibility or customization available to them, how easily the solution will integrate with the customer organization's existing systems and processes, how easy it is to operate, how expensive it is to run and maintain, the availability of replacement parts (if relevant) and the availability of either personnel with existing skills to recruit into the business to help manage and/or use the solution, or the availability of training and if necessary certification to upskill existing personnel as needed, and so on.

And within this mix of considerations is now another consideration, and one which I believe is increasingly important. Alongside the features, functions and qualities of whatever it is that the customer is purchasing, I believe that customers who are making more complex purchases are also increasingly asking themselves not just "is this the right solution for us?" but also "is this the right supplier for us?". Customers increasingly want to know not just that the product or service does what it needs to do, but that the supplier of that product or service will not simply sell it and walk away, but will *partner* with the customer to help them gain the maximum possible value from that product or service. So the question moves from "is the solution right for us?" to "is both the solution and the company that provides it right for us?". And therefore, when making the purchasing decision, potential customers are looking not just at the products and services themselves, but at the full range of value added services that the supplier offers alongside those products and services, which these days will include the quality of the customer success management services that the supplier can offer alongside everything else.

What's Truly New is the Partnering Approach

> Until now, the value generated from the solution has been solely the responsibility of the customer
> The concept of customer success management enables customers and suppliers to treat each other as "business partners"
> Suppliers can now take increased responsibility for the generation of business value alongside customers

Of course this is not in and of itself a new phenomenon – customers have been selecting the right supplier to help them with practical considerations such as customization and/or configuration work, the implementation of the solution and maybe also the ongoing management and maintenance of it too for many years. But generally speaking the more *business related* side of things has traditionally been pretty much the soul responsibility of the purchaser rather than the supplier. It may have been up to the supplier and customer working together to select the "right" solution components, to get those components up and running and working, and maybe even to keep them running and working on an ongoing basis if maintenance, management and support was a part of the package. But in terms of the value generated *from* those solution components... well that was solely the responsibility of the customer. Until now.

The bottom line then is this. If done well, customer success management turns everything around on its head a full 180⁰. It turns a company that used to sell products and services into a company that sells *results*. It even turns a company that used to "sell stuff to customers" into a company that "goes into business with partners" instead. Do I mean that literally? Well, maybe not entirely, although I do think that it's the direction of travel in which we are headed. But even if it's not a literal partnership from a technical or legal perspective, the relationship between buyer and supplier is increasingly looking like and acting like the relationship between partner and partner, and customer success management to my mind is the driving force of this changing nature of the relationship.

The way in which this happens is in the increased responsibility that suppliers are now taking on for not just the product or service itself, but for the results generated *from* that product or service. To illustrate this, let's think about how a traditional partnership works for a moment.

✔ Good product, plenty of manufacturing capacity

✖ Very little access to the market

COMPANY A

Let's say that Company A has a great product and plenty of manufacturing capacity, but very little access to the market to sell that product to customers,

…whereas Company B has fantastic access to this market and a really good sales force, but doesn't have anything to sell. Maybe Companies A and B can

get together and form a partnership where Company A does the manufacturing, Company B does the selling and they split the profits equally between them. The partnership is a win-win for both companies, since both companies are now doing what they happen to be both good at and well positioned to be able to do, and equally are benefitting from the other company – their partner – handling the things that they are *not* good at and/or are not well positioned to be able to do.

In this scenario, each partner selected the other one on the basis of what that other company was good at and able to do that they themselves were not good at or able to do. This plugged the gaps in their own capabilities to provide them with a business opportunity which neither company on its own would otherwise have. The business opportunity could then be exploited and the value returned from doing so shared between the two partners.

Does this situation exist in the real world? Yes it most definitely does. Take Ebay as an example. Ebay has a fantastic reach to millions of customers, and all the Ebay suppliers have products that those customers might potentially want to purchase. Ebay would struggle to survive if it didn't have any suppliers selling their products on its platform, and likewise many of those suppliers would struggle to survive without access to that platform's customers for them to sell their products to.

What's Truly New is the Partnering Approach

➢ Prior to CS: *"buy our products and services, they're really good"*

➢ With CS: *"partner with us and we'll help you generate the value you need"*

➢ Instead of asking: *"what product do you want?"*

➢ We can ask: *"what outcomes are you looking for?"*

➢ Instead of selling a *solution*

➢ We sell an *end result*

So now let's think about how this works with customer success management and the "180^0 turn" that we were discussing a few minutes ago. Whereas prior to customer success the message to customers may have been something along the lines of "buy our products and services, they're really good", the new message to customers might be "partner with us and we'll help you generate the value you need". Instead of asking our customers "what product do you want?" with customer success management in place we can start to confidently ask them "what outcomes are you looking for?". And therefore instead of selling them a solution, we can sell them an *end result*. An end result that both the customer *and now* the supplier is invested in and one in which in a very real way the supplier is also rewarded for when it is achieved, since the customer's attainment of value implies that the customer will renew the service contract and/or buy further products and services as relevant.

Welcome to the "Shared Risk, Share Rewards" Model

➢ In the new "partnership" model, both rewards *and* risks are shared between the customer and supplier

➢ Both companies need to extend effort to make "the partnership" work

➢ Both companies therefore have invested time and effort (shared risk) into the initiative, and both companies have something to gain (share rewards) from it

Thus with customer success management in place, companies can start to act very differently towards customers, treating them as business partners and in doing so transferring some (indeed sometimes much) of the risk from the customer to the supplier and in turn some of the rewards from the supplier to the customer. In other words… a *partnership* in all but name. Both customer and supplier are now bound up in shared risk, since both are extending effort (and therefore expenditure) in making the initiative work, and both customer and supplier will receive a share of the rewards when the initiative starts to generate value. The customer will get whatever the customer was looking for in terms of outcomes from using the products and services supplied, and the supplier will get the benefit of being able to continue to sell its products and services to the customer.

Welcome to the "Shared Risk, Share Rewards" Model

THE CONCEPT OF SHARED RISK AND SHARED REWARDS IS A POTENTIAL GAME CHANGER

This may seem like a trivial name change, but I promise you that what we're discussing right here is very powerful for companies to grasp and to put to effect. In summary, the provision of customer success management services enables suppliers to effectively "go into business" with its customers and in so doing to generate new levels of value from this new and greater merging of capabilities from both organizations combined than could have been achieved before by either one company alone. Customer success therefore is a potential game changer for companies, in that it unlocks the door to going far deeper in terms of the relationship between buyer and supplier and turning that relationship into one of partner and partner.

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Common CS Traps and Pitfalls

➢ Doing too much for each customer

➢ Not leaving time for continual professional development

➢ Not understanding your own company's customer success strategy

➢ Focusing on technical issues instead of business issues

➢ A lack of insight into your customer's business model, strategy, capabilities, challenges and outcomes

➢ Too much time spent on "the paperwork" and routine administration

➢ Lack of best practice resources such as a framework and tools/templates

In Chapter 12 of the book I have listed seven common traps or pitfalls that the unwary CSM can fall into if they don't watch out. Let's briefly discuss each one.

Pitfall 1: Doing too much for each customer

➢ The more that the CSM can influence and enable others, the more time CSMs will have available to them to help those customers further.

➢ CSMs must know what tasks they should get involved in, and what tasks fall outside of their remit

➢ CSMs should be realistic about what can and cannot be achieved with the available time and other resources

The job of the CSM is not so much to do things as to make things happen. Of course, customer success managers *do* have to do things – lots of things – but you will no doubt recall that one of the 14 tenets (or principles) of customer success management that we identified right at the beginning of the training manual in the very first chapter was *Tenet 9: The CSM is an influencer and an enabler*. Much of the value that CSMs bring is not in the actions they themselves perform but instead in their knowledge of what needs to be done and their relationships with other people within their own company, within the customer's company and sometimes within third party organizations that enables them to find the right person with the right skills and expertise to perform the right jobs at the right time.

The more that the CSM can influence and enable others to perform the necessary tasks to help customers attain the success they are looking for from their initiatives, the more time CSMs will have available to them to help those customers further.

In addition, it's important for CSMs to know what tasks they should get involved in themselves or influence and enable others to get involved in the performance of, and what tasks fall outside of their remit and should not be performed (or not by the CSM). There's no hard demarcation line here necessarily, but of course the start point for understanding what work is in or out of scope for the CSM is the Customer Success Proposal that we looked at in Module 4 of this training program and which dealt with Practical CSM Framework Phase 2: Commitment.

The Customer Success Proposal should be based upon the previous research conducted during Phase 1: Preparation, and should outline the types of help the CSM can offer, the types of benefits that the

customer should expect to receive from this help, and the way in which it is proposed that the CSM and customer stakeholders will work together to achieve those results. In turn and once approved, some sort of Customer Success Contract (formal or informal in nature) can then be drawn up that explains what activities will be performed and by whom. Referencing the Customer Success Proposal and Contract enables the CSM to remind themselves (and if necessary remind the customer's stakeholders) as to what tasks and activities are in or out of scope, and what the expectations should therefore be in terms of CSM activity.

Of course, regardless of what may or may not be written down in any proposal or contract, the customer success manager has an important CX or Customer Experience responsibility, that being to do all he or she can to provide the best possible customer experience for each customer. Doing so will most definitely enhance the value returned to customers and ultimately therefore the value gained by the CSM's company. However, the CSM also needs to be realistic about what can and cannot be achieved with the time and other resources available to them, and taking all calls on that time and those resources into account.
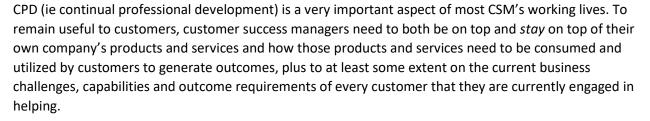
In short, there is no simple answer to help CSMs decide how to divide their time between customers, and which customers to spend more or less of their time helping. Each CSM must use their judgement to determine this, based upon the promises and expectations of the customer, the needs of other customers and perhaps most importantly of all, the overall Customer Success Strategy of the CSM's company.

Pitfall 2: Not leaving time for continual professional development

➢ To remain useful to customers, CSMs need to keep their knowledge and skills up to date

➢ A new starter might need to spend more time in CPD than a more mature and well established CSM

➢ Perhaps 80% of a CSMs efforts should be extended towards helping customers and 20% towards developing and enhancing their own capabilities

CPD (ie continual professional development) is a very important aspect of most CSM's working lives. To remain useful to customers, customer success managers need to both be on top and *stay* on top of their own company's products and services and how those products and services need to be consumed and utilized by customers to generate outcomes, plus to at least some extent on the current business challenges, capabilities and outcome requirements of every customer that they are currently engaged in helping.
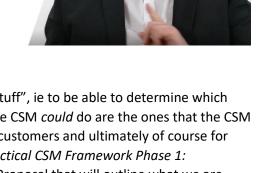
CPD requires time and effort, and many CSMs either resent the amount of time needed for it, or simply cannot (and do not) make the necessary time available for it. For many CSMs – as perhaps for many other busy professionals – there is at best a degree of resentment towards time spent researching new features of product releases, or familiarizing oneself with new software systems, or getting to grips with strategic or other changes within the customer's organization. Yet all of these things and many more need to be done, and need to be done well if the CSM is going to remain on top of their game and is going to be useful to the customer on an ongoing basis.

The more we know, and the better skilled we are at using that knowledge to generate value for customers, the more useful we are to those customers. This is of course a statement of the obvious. The trick comes in applying that obvious requirement to both get up to speed on all necessary knowledge and skills in the first place and then remain on top if it all on an ongoing basis, whilst still leaving sufficient time and energy to actually do the work itself.

Again there is no single magic number in terms of a percentage of time spent working on oneself (ie doing CPD) rather than time spent working on customer engagement activities. It's going to vary from CSM to CSM based upon a variety of factors, including the current numbers of and requirements from the customers that the CSM is engaged in helping at that time, and the current numbers and levels of knowledge and skill gaps that the CSM has and the impact these gaps are having on their ability to perform sufficiently well in their role. A new starter with a lot of knowledge and skill gaps but a relatively light case load of customers to help might well spend more time in CPD than a more mature and well established CSM for example. In the training manual I suggested applying the 80/20 rule as a very general rule of thumb, where 80% of the CSMs efforts should be extended towards helping customers and 20% towards developing and enhancing their own capabilities. Some people might think that 20% of time out of the business (ie not generating immediate revenues) is a lot, but I would say that this time is an essential investment in the generation of *future* revenues, and as such it is critical for CSMs to find this time. As mentioned however, the exact proportion of time spent in CPD will vary from CSM to CSM.

Pitfall 3: Not understanding your own company's customer success strategy

➢ A Customer Success Proposal can only be optimal if it takes into account the CSM's company's vision, mission and major corporate strategies

➢ Different companies will have different outcome requirements from their CSMs' efforts

➢ All CSMs should know their own company's corporate success strategy

It is one thing to "do stuff" but quite another to "do the right stuff", ie to be able to determine which tasks and activities from all of those tasks and activities that the CSM *could* do are the ones that the CSM *should* do in order to generate the maximum returns for their customers and ultimately of course for their own company. As we discussed in depth in *Module 3: Practical CSM Framework Phase 1: Preparation*, when it comes to creating the Customer Success Proposal that will outline what we are proposing to do for the customer, this proposal can only really be the optimal proposal for the CSM's own company's perspective if it takes into account that company's own vision, mission and major corporate strategies.

You may recall from the conversation we had about this in Module 3, that different companies will have different outcome requirements which they want to see as a return from their investment in their customer success managers' efforts. For example, companies which sell services contracts are very likely to place increased contract renewal rates and revenue levels very high up the list of desired outcomes from the time spent by their CSMs in helping customers. Other outcomes that the company may be looking for from customer success engagements might include increased understanding of customers' needs, increased customer lifespans, increased levels of advocacy, and increased expand sales opportunities.

Chapter Two of your training manual is titled *Readiness for Customer Success Management* and the first section in this chapter is called *What is your organization's customer success strategy?* This section of the chapter explains the concepts behind a customer success strategy, including what it is, why it is important, and how a company might go about researching and analyzing their customer success needs

and then formulating a CS strategy to meet those needs. One of the subsections was about "knowing your own company's success strategy", including its overall purpose and direction and also the detailed objectives and tactics that contribute towards the strategy's attainment. If you have forgotten this information it may be worth having a quick skim through the chapter again to refresh your memory. It might also be worthwhile reviewing the following specific piece of advice from it:

"…the test of your understanding is whether you are able to explain your departmental strategy and tactics to a third party. Again, this is a great exercise to try out either verbally or written and either to a real person or to a fictitious third party if no one is handy as your guinea pig. As with the overall corporate vision and strategy, if you find that you are unable to explain your departmental vision and strategy in simple terms then do whatever you need to do to rectify this."

Pitfall 4: Focusing on technical issues instead of business issues

➤ This tends to be a bigger trap for those who work for companies in more technical industries

➤ However, all industries and most job roles have a technical aspect to them

➤ The problem arises when people *think* they're focusing on the customer's business outcomes, but have slipped back to talking about their own products and services

This pitfall is quite a straightforward one, and whilst I think it can easily exist as a trap for the unwary CSM working for any type of business at all, it is obviously a much bigger trap for those who work for companies in highly technical industries. I do not mean by this that it's limited to IT companies or those involved in hard sciences and/or big engineering projects etc, though these would all definitely fit the profile. I also mean any type of industry with a technical component, whether that's something like accountancy, or law, where the technical side of things is highly self-evident, or whether it's a "softer" industry such as HR, or Training, or even a "creative" industry such as illustration or marketing. All of these industries have a creative side, all have a people skills side, and all have a technical side.

For example, a good medical practitioner needs to be able to get on well with his or her patients and make them feel comfortable, but also needs to be familiar with the equipment used to diagnose and determine what the illness is, and they also need to decide which from a range of possible treatment options might work best in this particular patient's unique situation. In this way, technical skills, people management skills and creative skills come together to help the medical practitioner deliver value to their customers. Most industries and most jobs will have somewhat of a balance of these three, all though the ratios between them may vary considerably from industry to industry, and from job role to job role.

Now let's talk about where the pitfall itself can sometimes occur. The pitfall occurs when companies forget that the world has moved on, and that to a greater or lesser extent, their business is no longer just to sell products and services but to sell results, and in particular to sell business results. IT (one of the worlds with which I am most familiar) is a great example of this. I have seen companies – and I

include the very largest ones here, who are often just as guilty if not more so as the smaller ones – who *say* they are selling business outcomes when at best what they are engaged in is selling technical outcomes, and mostly what they are doing is selling technical solutions, and frankly sometimes what they are doing is selling features and functions of products and services.

Please don't get me wrong; I am not saying that product selling and/or solution selling is wrong, and the only way to sell anything these days is business outcome selling. I am absolutely not saying that and neither do I believe it. There is a time and a place for selling products, and a time and a place for selling solutions. The problem comes when companies (and more specifically the people who work for those companies) think they're doing one of those things when in reality they're doing quite another.
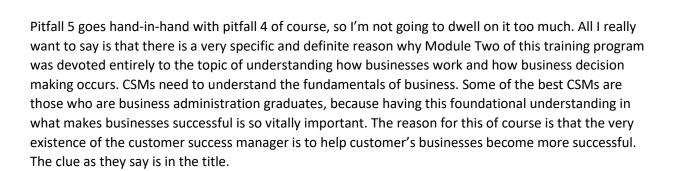
As a general rule, knowing your own company's world is the easier part, and knowing your customer's world is the harder part. Also, our own world is what we tend to think about most of the time. By their nature human beings (even such erudite and accomplished ones as customer success managers) tend to be self-centered. After all, all we ever really know is ourselves. So it is normal and natural to focus conversations on "the bit which interests us" which very often is the more technical bit, because that's the bit about *our* company's products and services. In reality of course, what we ought to be doing is focusing much harder on what interests the customer's stakeholders the most. And naturally what interests them the *least* is our products and services, whereas what interests them the *most* is their own company's initiatives, challenges and outcomes and how they are going to help attain those outcomes.

Pitfall 5: A lack of insight into your customer's business model, strategy, capabilities, challenges and outcomes

➢ Closely aligned with Pitfall 4 (focusing on technical issues instead of business issues)
➢ The entirety of Module two of this training program is devoted to Business Fundamentals
➢ A foundational understanding in what makes businesses successful is vitally important for CSMs to have

Pitfall 5 goes hand-in-hand with pitfall 4 of course, so I'm not going to dwell on it too much. All I really want to say is that there is a very specific and definite reason why Module Two of this training program was devoted entirely to the topic of understanding how businesses work and how business decision making occurs. CSMs need to understand the fundamentals of business. Some of the best CSMs are those who are business administration graduates, because having this foundational understanding in what makes businesses successful is so vitally important. The reason for this of course is that the very existence of the customer success manager is to help customer's businesses become more successful. The clue as they say is in the title.

Pitfall 6: Too much time spent on "the paperwork" and routine administration

➢ Records need to be kept and need to be kept well in order to ensure that the data is accurate, complete and up to date

➢ However, the admin is not "the work itself", it is merely "the documentation of the work"

➢ It is important to ensure we maximize the time we have available to be out there actually "doing the work"

I think that this is something that pretty much everyone can relate to, whatever their job role. And what's true for the majority of people is certainly true for customer success managers. Of course a lot of the paperwork and other routine admin work that CSMs face is not something that CSMs can alter or control in any way. CSMs are not CEOs and are not self-employed individuals with completely autonomous control over how they spend their time. Just like everyone else from police officers to supply chain managers, the CSM's records need to be kept and need to be kept well in order to ensure that the data is accurate, complete and up to date. Their company relies on this data, and sometimes they themselves will be relying on it in the future as well.

So with all of that said and duly recognised, I also want to say the other side of the coin to that is of course that we must never forget that the admin is not "the work itself", it is merely "the documentation of the work", and the important thing is to do all we can to maximize the time we have available to be out there actually "doing the work". We want the admin to be as simple as possible to accomplish and take as little time and effort as possible, so that we have more time and energy available to use for doing the real stuff – making a change out there in the real world of our customers' businesses.

As an extreme analogy which I hope doesn't happen anywhere, but I suspect might possibly happen on occasions at last somewhere, imagine a company whose new customer success recruits' entire induction training program comprises just a brief conversation with their line manager, followed by the online self-study training available to them from whatever customer success software vendor happens to have

supplied that company's CS software systems. Might that newly hired CSM possibly end up with an erroneous view about what's actually important and what isn't?

I have seen companies who have spent thousands, tens of thousands or possibly even hundreds of thousands of dollars in one case on configuring, customizing and managing their CS data systems for what I would describe perhaps as a "questionable" return on their investment. This is all done for the very best intentions, and by the way CS software systems are extremely useful – in fact invaluable – tools for CSMs to have access to. So do not let the software tools dictate your customer success strategy or your customer success activities – the tools are there for our use, it is *never* the other way around!

Pitfall 7: Lack of best practice resources such as a framework and tools/templates

➢ Closely aligned with Pitfall 6 (management of time between the "admin" and the "real work")

➢ The CSM's job is to use best practices to help customers become more successful and in so doing make further renewals and purchases

➢ More mature CS teams are better positioned to support this, but maturity takes time to achieve

For our final pitfall I've picked something that's very dear to my heart, and which again is closely aligned to the previous pitfall around management of time between the "admin" and the "real work". The concept of this pitfall is the same, in that it is not (or perhaps I should say it "should not be") the CSM's job to work out how to perform CS tasks and to create the tools (ie the templates, checklists, matrices, analyses, models and so on) that enable them to go about performing customer success related activities that lead to customers being more successful. Rather, it is the CSM's job to *use* those tools to actually go out and perform those customer success related activities so that customers become more successful and in so doing hopefully buy more stuff from the CSM's company.

Many customer success organizations are relatively new and relatively small. Those that are larger and that are well established are likely to be a lot further down the road in terms of organizational maturity, and are likely to have more systems and processes to hand, more defined best practices and step-by-step guidance for their CSM staff to follow, and more time saving and quality enhancing tools available for those CSMs to use in their day-to-day activities.

If that describes you and your department then please count yourself as one of the fortunate ones, because there are many other CSMs out who are not in such a lucky position. CS departments cannot reach maturity overnight. Inevitably it takes time and effort to get there. It's a journey, and a long and intricate one at that. Not only is it the case that it cannot happen overnight, but is also the case that the pace of progress cannot be forced over and above a certain level. Again, I have seen what happens when the cart is put before the horse and intricate, complex and sophisticated systems and processes are designed and implemented first, before the true needs of the CS organization are really fully

understood. All that happens in these situations is that a lot of frustrated CSMs end up being forced by "the system" to do the wrong things, in the wrong way, and in the wrong order, and a lot of money is wasted on continually adjusting and readjusting "the system" as more and more is revealed about the company's true CS requirements.

Certainly in the first two or three years and arguably even up to the first five to seven years, CS teams are learning what they *should* be doing even as they are doing it. By the end of this process, the CS team as an organization will have a much clearer idea as to how they can help their customers and what value they can return to their own organization. And once this is known then of course the requirement for systems, processes, best practice guidance, tools, templates and so on is also then realizable.

That's not to say that CS organizations should not start off by using a CS software system, or begin immediately developing their own unique CS Framework and resources for their CSMs to use, because most definitely these things will be extremely helpful if not essential right from the get go. However, my recommendation is to start off with a flexible attitude and a willingness to learn from experience and to adapt corporate CS strategy and best practices in the light of new information as it becomes available. Much as the individual CSM will use Practical CSM Framework Phase 7: Engagement Evaluation to evaluate their own personal performance for a specific customer engagement, so the CS organization as a whole should be engaged in a continual process of evaluation and improvement, to help them move closer towards a more mature departmental capability that delivers the levels of both productivity and quality that it perhaps could only have aspired to in its early days.

Well… that's it – you've done it and now you have completed the final workbook of the final module! How do you feel – exhausted or elated, or a little of each? Well in fact it's not quite over, because you still have the case study-based exercise and final test to complete for Module 10. And then after that you'll be ready to start revising for the final exam to gain your Certified CSM Professional status. But from me it's "goodbye" and thank you very much indeed for your kind attention over the multiple hours we've spent in each other's company. I hope you have enjoyed viewing this training material as much as I have enjoyed creating it, and perhaps more importantly I hope you have found the training to be beneficial for your career in whatever stage you happen to be at.