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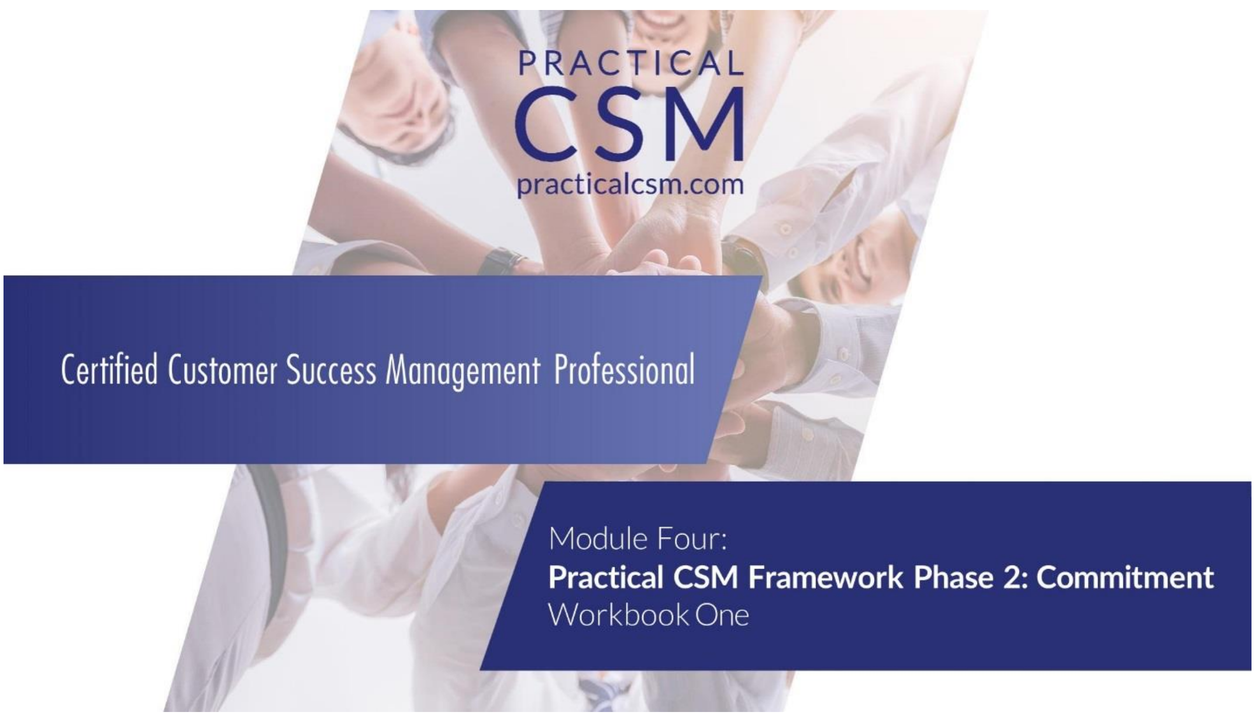
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Module Four:
Practical CSM Framework Phase 2: Commitment
Workbook One

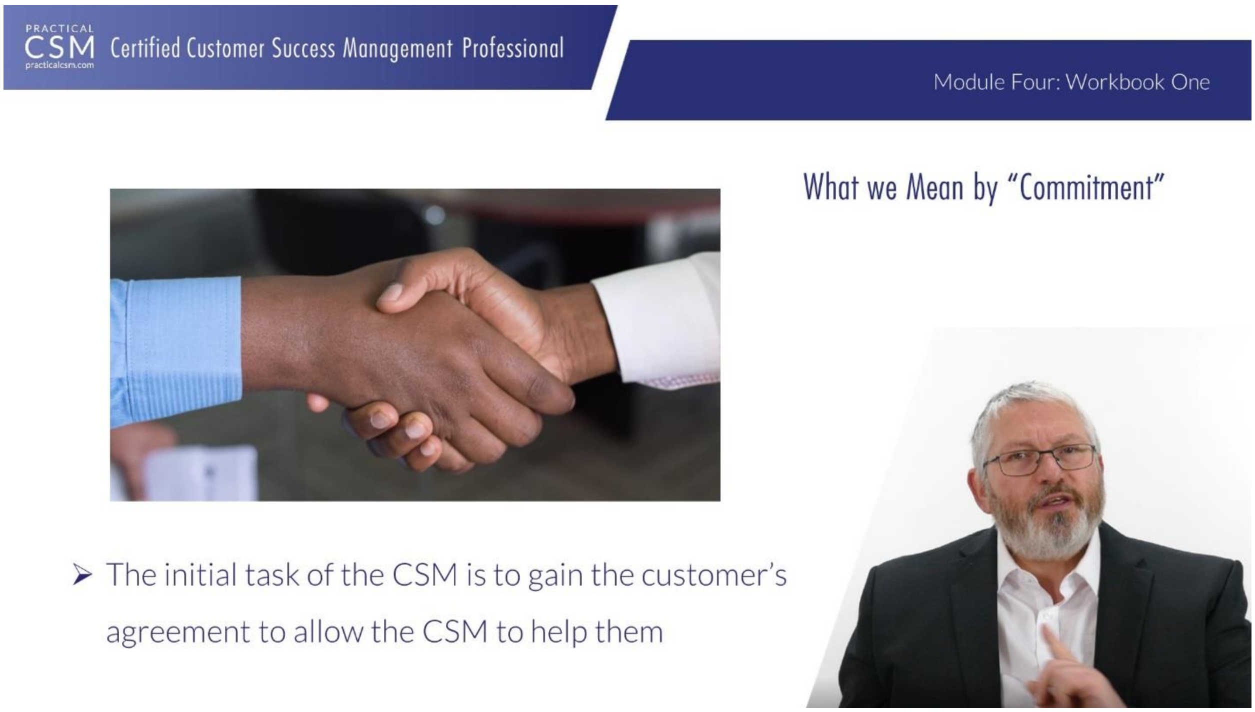
Welcome to Module Four of the PracticalCSM.com Certified Customer Success Management Professional training course. I'm Rick Adams and I am the senior consultant here at Practicalcsm.com, and your instructor for this course.

Before watching the Module Four videos, make sure you have read Chapter Five: Practical CSM Framework Phase 2: Commitment from the Book *Practical Customer Success Management*.

In the last module we looked at the tasks that the CSM gets involved in during Practical CSM Framework Phase 1: Preparation, and we reviewed some of the tools that the CSM might use to complete those tasks. In this module we will follow the same format and apply it to Practical CSM Framework Phase 2: Commitment.

In Module Four Workbook One we will be covering the following topics:

What we mean by the term "commitment" and why it is necessary, the importance of establishing how you can help, determining what you will do and agreeing how you will work together, the need to establish good quality working relationships and the role of credibility and rapport in doing so, preparing an offer to assist the customer and negotiating and agreeing terms of engagement, how to prepare for and run a successful meeting, and critical questioning skills for customer success managers



You will recall from Chapter Five of my book *Practical Customer Success Management* that the initial task of the CSM when engaging for the first time with the customer is to gain that customer’s agreement to allow the CSM to help them with onboarding, adoption and ultimate value realization for the products and services they have purchased.

Doing this takes commitment from both parties – commitment from the CSM to provide their time and to allocate resources to assisting the customer with their needs, and commitment from the customer to make their stakeholders available to meet with the CSM and to provide information about their needs and their current situation to enable the CSM to understand both where they are currently and where they want to get to in order to help the customer to build a roadmap to get from A to B.

This commitment should be explicit rather than general, and ideally should be customized to the specific needs of the individual engagement, since a "one size fits all" approach is rarely likely to be suitable – particularly when dealing with larger, more complex solutions.

Gaining that commitment requires some time taken by the CSM to research and understand the customer's needs and current position, and also to learn what skills, knowledge, experience, assets and resources regarding onboarding, adoption and value generation the customer already has, in order to know what types of help and assistance this particular customer might benefit from that the CSM is able to provide.

One problem that can arise if the CSM is not careful, is a basic misunderstanding on the part of the customer as to what the CSM is actually offering them. This can arise very easily due to preconceptions by the customer's lead stakeholder around what a customer success manager's role is and what types of help and assistance they offer. This misunderstanding can be caused either just by a general misconception as to what customer success management is and does, or it could be caused by specific experiences that this customer's stakeholder has had whilst working with *other* CSMs from *other* companies during previous engagements. This latter type of preconception can be harder for a CSM to break through, since the customer stakeholder's own direct experience sets strong expectations as to what they are likely to experience from working with a CSM this time around.

The fact is that customer success management as a specific, separate role or function is still a relatively new innovation and not all companies that provide a customer success management services to their customers are necessarily doing it the same way. For example, I have heard many stories and seen evidence myself of CSMs being interviewed for so called "customer success management" roles that turn out to actually be sales or account management roles in all but name, and not really customer success management roles at all. Similarly, I've also seen job descriptions for CSMs that might better be described as customer service jobs. Also, even where the role really is a customer success management one, that does not of course mean that previous experiences of working with CSMs were all positive, since those CSMs may be more or less good at their job and/or more or less well trained, resourced and supported by the company they work for.

Customer stakeholders may therefore either be completely ignorant about what customer success management is and how it might help them, because they have never experienced it before, or they may have experienced a whole range of different things that were described to them as “customer success management” but which were to greater or lesser extent not what I would define as being customer success management at all. Additionally, even the way in which the CSM’s own colleagues from within their own company may have described customer success management to the customer in earlier conversations may vary from what the CSM actually delivers, since they too may be confused or unclear even as to what their own company’s CSMs do and how they do it.

What this all boils down to then is that customer stakeholders may have all sorts of preconceptions as to what the CSM does and how useful those things will be to them, and the CSM needs to bear this in mind when approaching the customer to offer their services.

My recommendation is to "get in early" – the earlier the better. This approach removes or at least reduces the chances of the CSM's colleagues explaining things wrongly to the customer's stakeholders and addresses issues or concerns that the customer's stakeholders may have around the role of the customer success manager at a time when those issues and concerns are not burning problems for the stakeholders, making those stakeholders potentially more receptive to having the real facts explained to them about the role of the CSM, how the CSM engages with and works with them and the potential benefits that this engagement can bring them.

Getting in early takes a little bit of upfront collaboration and negotiation between the customer success function and the sales function, and ideally should involve the marketing team as well. What is ideally required is for customer success management to be made a central, standard component of all marketing collateral and all sales conversations, so that it becomes a natural part of the offer in the eyes of the customer, rather than an unexpected bolt out of the blue or an "additional thing to think about" at the post sales stage. By introducing the concept right from the beginning that "when you purchase our products and services you don't just get the product or service itself, you also get a member of our CSM team's help and guidance to onboard, adopt and generate measurable value from them", the customer is entrained (ie gradually acclimatized into a pattern of thinking) to understand and accept this as simply "the way things get done around here" as opposed to thinking of it as an optional extra that needs to be separately worried about, negotiated and decided upon, or even as a possible threat in terms of misunderstanding it as "another way to try to sell me something I don't really need".

In addition to having both the company's marketing collateral and sales people act as ambassadors and evangelizers for customer success management as a natural and useful aspect of the relationship between the company and its customers, it may also be useful for the specific CSM him or herself to meet customer stakeholders at an early stage in the pre-sales conversation and for them to spend a few minutes introducing themselves and explaining their role to those stakeholders – perhaps even citing examples of how they have helped previous customers in similar situations. From the sales person's perspective this can be useful, since it shows the potential customer that they will be getting a valuable service that helps to enhance the overall value of the deal and to differentiate the offering from competitors' offerings. It also ensures that any inaccurate preconceptions about what customer success management is and does are dealt with straight away – at least so far as those specific customer stakeholders are concerned.

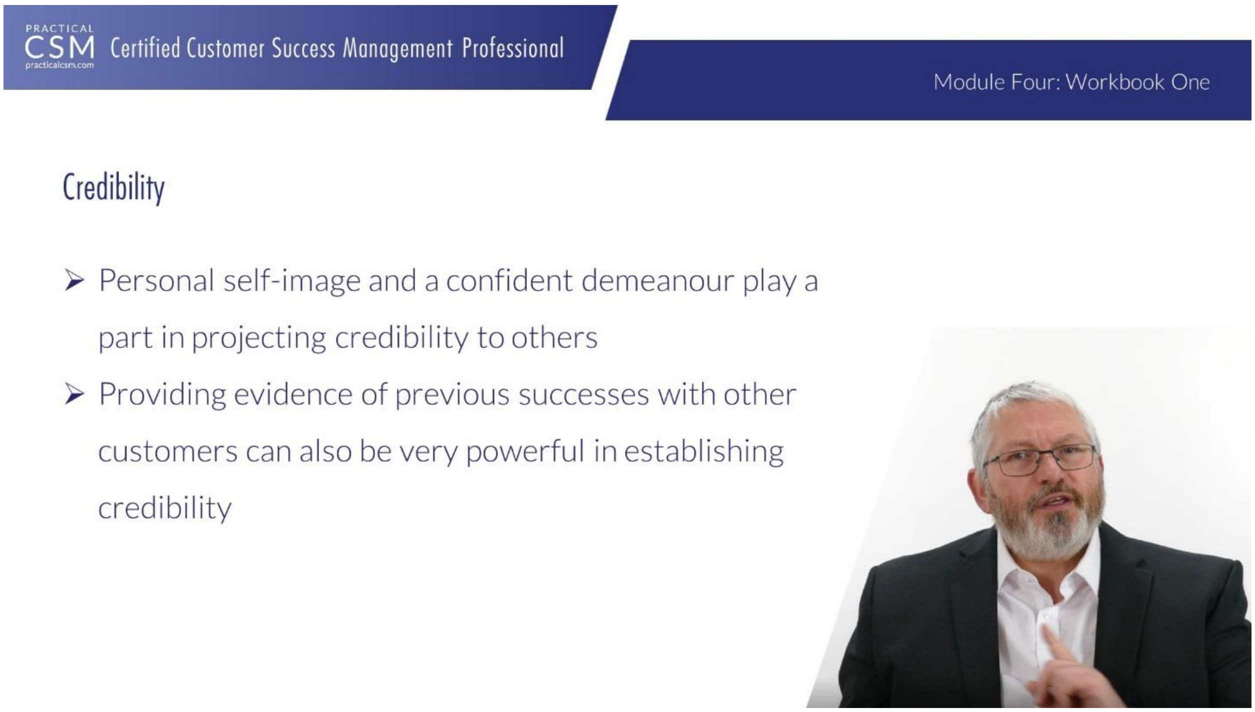
From the customer stakeholder's perspective this reassures them that they can get along with and work productively with the CSM and that they can potentially gain multiple benefits from doing so. From the CSM's perspective it gives them the opportunity to get an early impression of at least some of the customer's key stakeholders and starts to form relationships with those stakeholders that they pick up again later on down the track when the time comes to engage with the customer more fully.

Working with customers is what customer success management is all about. Most CSMs come to the customer success role as someone with existing experience and skills in working directly with customers, and so this is not intended as a "soft skills" course in basic skills relating to communication skills or selling skills, etc. However, it is worth perhaps spending just a little time on the topic of relationship building.

The two words I have chosen to represent the skill of relationship building are *credibility* and *rapport*, since a combination of credibility and rapport are the stepping stones to building high quality trust relationships with customer stakeholders. These two words are similar in their meaning, but each one also has its own specific significance that is worth defining.

Credibility is the property of being "believable" as someone with the right knowledge, skills and experience for the role which they inhabit. In the case of a customer success manager then, having credibility would mean that people believe that you have the right knowledge, skills and experience to be able to help them to onboard and adopt your company's products and services and to help them generate and measure value from using those products and services over time, and ultimately to help them to attain their own company's desired outcomes from the initiative that they purchases those products and services to support.

In a sense, having credibility is not about *being* those things as much as it is about *seeming* to be those things. Obviously the decent CSM really does need to *be* those things, but for them to have credibility, they need to make sure that their abilities are not just present within them but are understood and believed by others.



Some of this credibility will come from the CSM's overall demeanour – the way they project themselves as a person, or their self-image if you like. CSMs who are confident in their own abilities and who are comfortable in their position are likely to show this confidence and comfort in many subtle ways that are likely to be picked up (albeit perhaps unconsciously) by the customer's stakeholders and which provide reassurance to them that this is a person who knows what they are talking about.

Another aspect of credibility however is factual evidence. Explaining (or otherwise proving through documentation for example) your previous roles and experience, your qualifications, the work you have done for other customers in similar situations and (particularly) the results you helped those other customers to attain are also an important part of establishing credibility.

Since credibility is one of the foundations to building a trust relationship, CSMs should consider how they come across to customer stakeholders in terms of their credibility and should work on enhancing this credibility as much as necessary.

Rapport is somewhat different to credibility, and I see it as being the other half of the "trust equation" – the yin (feminine) to credibility's yang (masculine) as it were. Rapport could be defined as the quality of developing harmony within a relationship. It's a close relative of friendship, but it's not the same as friendship – friends being the people you choose to spend time with – but it's unlikely that a close friendship will ensue unless rapport is developed, since who would want to spend time with someone who was not in harmony with them?

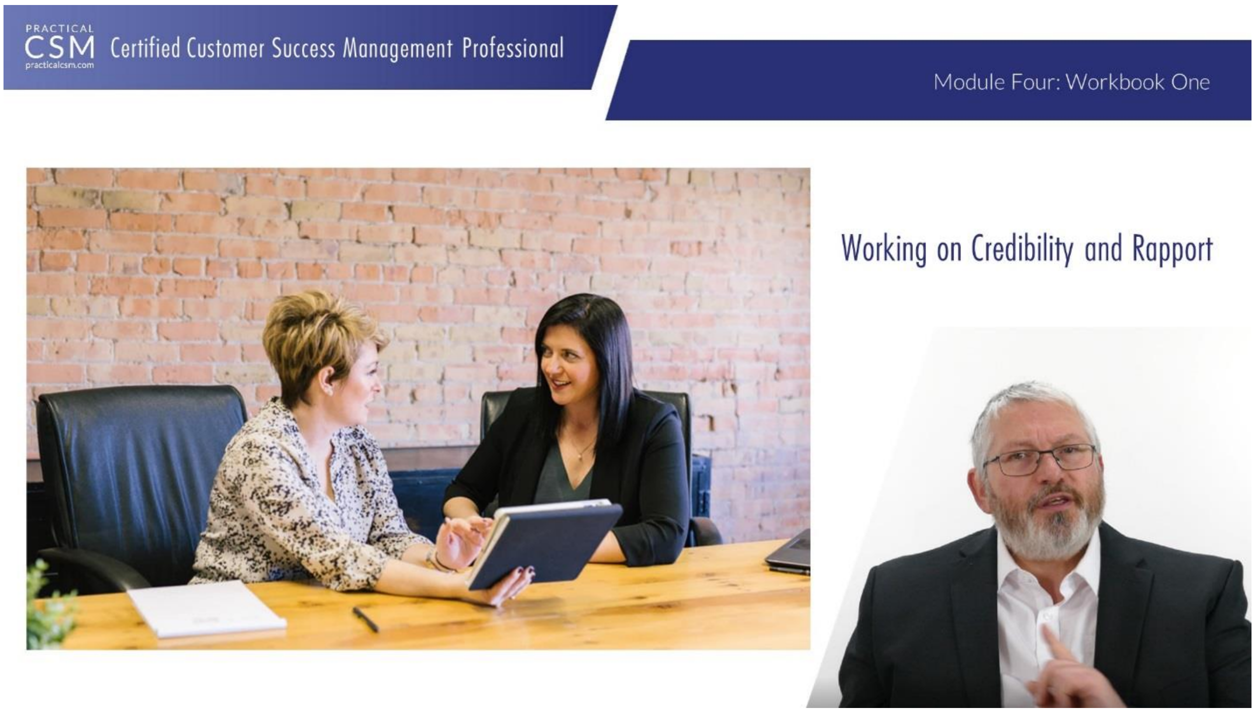
To increase rapport requires empathy and effort extended to understand the stakeholder's personality, problems, concerns and interests, and a willingness to synchronize at least to some extent with those personal characteristics and concerns in order for that harmoniousness to develop.

Whereas credibility focuses more on *you* and your own qualities (skills, knowledge, experience, etc), rapport focuses more on *them* and your ability and willingness to understand them and to enter into and share their world view with them. This is why I likened it above to the yin or feminine principal, which focuses more on passivity and nurturing compared with the yang or masculine principal that focuses more on positivity and action. Both are equally relevant to forming trust relationships and both are needed in order to wholly and successfully create that relationship.

Interestingly therefore, it might be said that the development of credibility and the development of rapport require different approaches and use different personality traits. As such it is entirely possible for someone to be excellent at one aspect of the trust relationship (credibility for example) and entirely useless at the other (eg rapport). It is not unreasonable therefore for CSMs to ask themselves the question "How good am I at establishing credibility?" and "How good am I at developing rapport?" Whatever your answers, the first step is now done, which is simply to consciously decide to work on developing credibility and rapport.

If you're not sure how credible you seem to others and/or how good you are at developing rapport, then find someone whose opinion you trust and who understands what you do for a living, and ask them. Make sure you select someone who is able to understand enough about your role to have a valid opinion as to whether or not you will come across as credible in that role, and who knows enough about the type of people you are likely to meet as customer stakeholders to understand whether you are likely to be able to develop rapport with them. Also make sure you brief that person to tell you the truth, not just some kind-hearted and well intentioned words of reassurance that they might otherwise think you want to hear!

Asking one or two people about how you come across in terms of credibility and rapport can often be reassuring and can sometimes be quite illuminating. Ask your friend or colleague who has agreed to give you feedback what they think you could do more of, do less of and/or do differently in order to establish greater levels of credibility and rapport. Perhaps even try their suggestions out with them and/or with others to see what transpires.



Another good way of learning about yourself is to have a few customer meetings videoed or at least audio recorded (with the permission of those present of course) and then to review the meeting from the perspective of your performance in developing credibility and rapport. By the way, you don’t need to explain that this is the reason behind you wishing to record the meeting. Instead you could explain that it’s to ensure that you have a record of what was discussed for use as a reference in whatever work it is you are doing for them (developing your customer success proposal for them, for example).

Once the CSM has performed the necessary research and analysis, and now that the beginnings of a trust relationship have begun to be established, the CSM can create a proposal to present to and discuss with the customer's key stakeholders. This proposal can 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.

After appropriate discussion, responding to any questions that customer stakeholders may have, and where necessary negotiating any amendments to suit the needs of those stakeholders, the proposal can then be turned into a contract that both parties can use as an ongoing reference point that can be validated as progress is made to show what *has* been done, what is *being* done and what *will* be done, as well as how and when it has or will be done and even what objectives, outcomes or targets will be achieved by this work.

For some companies' customer success teams, this is literally a contract which is signed by both parties and represents a formal agreement to provide the stated services to the customer. Other customer success organizations do not make the offer of help so formal, but leave it as a more fluid, flexible and informal agreement between the two parties. Personally I like the formal approach since it puts things onto a professional standing and ensures that everyone is clear about what will happen, when it will occur and who will be responsible for making it happen and in a very literal sense is "signed up" to playing their part in making sure that it *does* happen. After all, whether or not customer success management is separately billable on the customer's invoice, the customer *is* still paying for it one way or the other, and therefore it seems reasonable to me that the service and its outputs in terms of results should be formally clarified and agreed in this way.

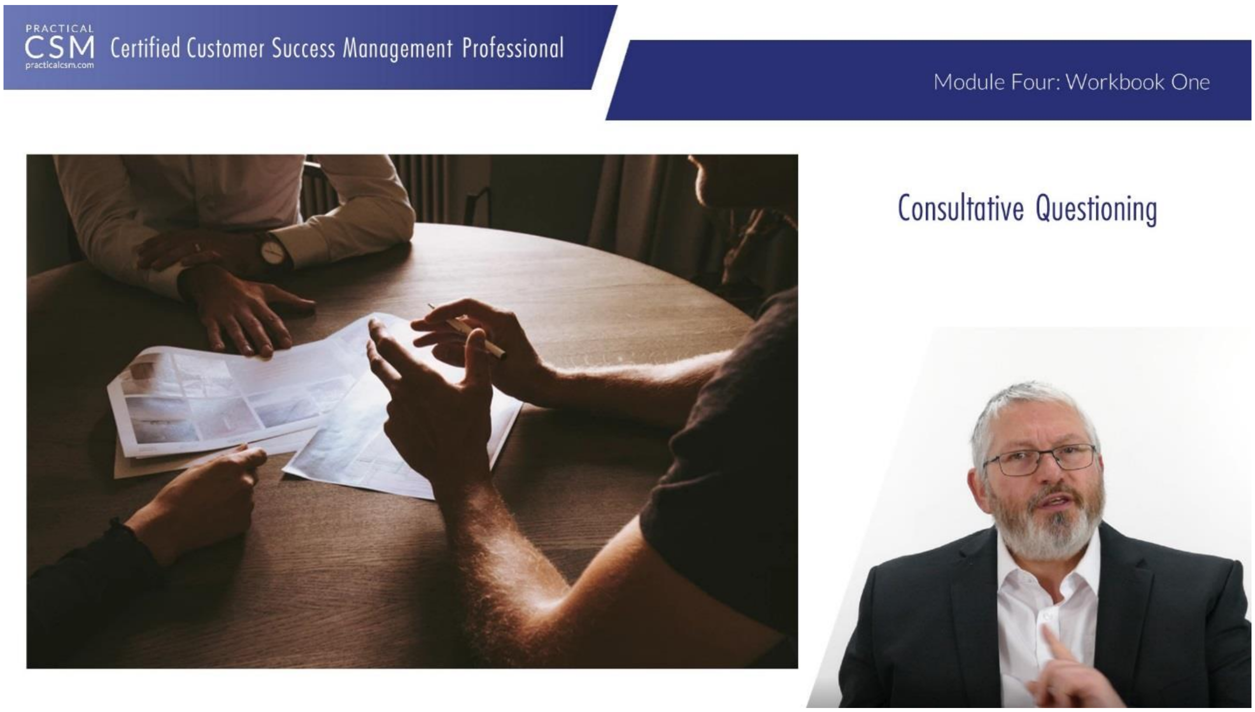
Holding and attending meetings will be a core activity for the vast majority of customer success managers. These meetings will include internal meetings within the Customer Success team, wider internal meetings with others from within the CSM's own company; especially with members of other customer facing teams a such as those from Sales, Marketing, Customer Services and Professional Services departments, and of course meetings with customer stakeholders.

It is my belief that in business in general, too many meetings are held – more than are really necessary. Not only this but again in general meetings are conducted inefficiently and take more time than really necessary to get their work done.

That said, it must be remembered that whilst efficiency and productivity are both very important to the customer success manager, it is also important that CSMs find a working style and cadence that fits the needs and personalities of the customer's key stakeholders and which also allows time in front of those stakeholders for the CSM to establish the types and levels of credibility and rapport that we discussed earlier in this video that will enable the CSM to grow and maintain valuable trust relationships with these stakeholders.

In other words, there could be argued to actually always be two agendas for any meeting – especially any customer facing meeting – the exoteric (ie revealed in plain sight) agenda that is published and shared with all attendees, and the esoteric (ie hidden from view) agenda that is not published and shared with everyone but which nevertheless is equally important to the CSM. The exoteric agenda is simply the standard meeting agenda that lists the topics that need to be discussed by meeting attendees and specifies the decisions that need to be reached by those attendees. The esoteric agenda however lists other, more strategic work that the CSM may have identified needs to be completed, such as the development of credibility and rapport with certain key stakeholders in order to establish or maintain good working relationships, or the careful handling of certain people and/or topics to ensure that particular stakeholders' feathers are not ruffled in order to avoid unnecessary difficulties further down the line. Whether or not any such esoteric agenda needs to be written down and how the CSM handles both agendas in order to ensure all items from both are successfully dealt with is left to the CSM to determine.

In terms of meetings best practice and how to organize a meeting, set an agenda and manage meeting attendees, the CSM is referred back to Chapter 5 of the book *Practical Customer Success Management* and in particular Section 5.3 that deals with communicating with the customer and section 5.4 that provides advice and an example agenda outline for holding an initial customer meeting. In Particular, Table 5.2 lists and describes the steps in planning for a customer meeting, and CSMs may find the best practice information and advice within this table useful when developing meeting agendas and holding meetings – especially more complex and/or important ones.



Consultative questioning is the process of gaining the necessary understanding to be able to help the customer through the use of good quality questions. A good quality question is quite simply the question which enables the stakeholder being questioned to understand what the CSM wants to know so that they can provide them with that answer. As simple as this sounds, to be good at consultative questioning takes practice and experience, and also requires the right trust relationship to have been developed so that the person being questioned feels comfortable with providing the answer.

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Rule	Description
Know your outcome requirements	Whenever you know ahead of time that you will be conducting a meeting where you need to gain information from one or more people you should ensure you are clear on what your outcome requirements are for this meeting, and this should include whatever information you need to collect.
Plan and document your questions	Rather than just hoping to remember everything that needs to be asked, or hoping you will be able to think of a way to ask for the information you need, plan your questions in advance and document them so that you can have them in front of you during the meeting.
Brief the attendees ahead of time	It helps attendees to know ahead of time what information you need from them. This enables them to prepare their responses and gather any information they might wish to bring with them to reference in their answers. Doing this also helps to prevent the possibility of humiliating attendees by asking them questions that they do not know the answers to.

Consultative Questioning

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Rule	Description
Provide the right environment	If it is within your power to do so, try to create an environment that is appropriate to the meeting. Concerns relating to comfort, noise and other distractions and particularly to confidentiality if sensitive information will be discussed should be addressed. If the meeting will be a long one you may want to consider breaks and refreshments to keep attendees energized.
Build the trust first	Even if you already know and have a good relationship with the stakeholders, do not start the meeting with asking about sensitive or difficult topics. Instead start the meeting in a comfortable way and build empathy and rapport in the room first before touching upon delicate subjects.
Ask the same question many times	Do not always accept that the answer you have received is the complete answer or that it contains everything you need to know. Try asking the same or similar questions several times (for example "*what else…*") to help the stakeholder think more deeply about the topic and provide further information about it.

Consultative Questioning

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Rule	Description
Break down complicated topics	Use the concept of "chunking" to break down any large or complicated subject into a series of smaller and more digestible topics that can be discussed and dealt with more easily one-by-one.
Use open questions to explore topics	When a topic needs further exploration use open questions to enable this exploration to take place. Open questions are questions that require a sentence or two or even a paragraph or two in response (for example "*what do you think about…*". Use multiple open questions to continue this exploration as long as necessary.
Use closed questions to gain consensus or commitment	When you need consensus (such as from multiple stakeholders) or a commitment from one or more stakeholders use closed questions. Closed questions require a short, definitive response (for example "*are we all agreed on…*").
Use active listening techniques	When you want to either check you have understood something or reassure the stakeholder that you understood what they have said you should employ active listening. This entails paraphrasing back to the stakeholder what they have just told you and asking for them to validate the accuracy of your words (for example "*so what you are saying is…*").

Consultative Questioning

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Rule	Description
Ensure all stakeholders are able to have their say	If there are multiple stakeholders in the meeting you may find that some stakeholders are more dominant of the conversation and others more reticent to share their views or knowledge. Try to provide a supportive environment that enables all stakeholders to feel comfortable about contributing, and proactively ask quieter stakeholders for their contributions if you can do so without making them uncomfortable.
Summarize progress as you go along	Do not wait until the end to make sure that everything has been discussed and (if necessary) agreed. Instead, break the conversation down into a series of sections and summarize progress at the end of each section. Try to gain consensus from stakeholders that the section has been fully discussed before moving on.
Note any information that is missing	Even though you might ask all the right questions, that doesn't mean that the stakeholders will know all the answers. You may well uncover areas that require further research to determine the required information. If this occurs note what information is missing together with who will be responsible for researching this information, by when the research will be accomplished and what they will do with the information once uncovered.

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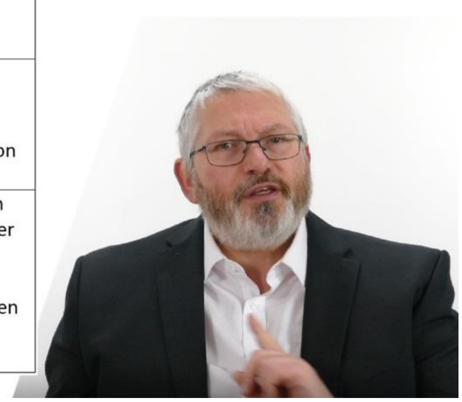

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Rule	Description
Create an agenda and manage time	As with any meeting it is important to manage the meeting so that as far as possible all topics are given adequate time for discussion debate and (where necessary) negotiation and consensus forming. An agenda with timings can be a useful help in managing the progress through a meeting.
Document the meeting outcomes	Make sure that information gained from the meeting is adequately documented in whatever format is necessary. If required, make sure that this information is circulated to meeting attendees and/or other interested parties.
Follow up!	Where further activities were agreed during the meeting (such as further research to uncover missing information), the CSM needs to ensure these activities actually take place and results are documented. Next steps should be considered after every meeting and again the CSM should ensure that progress forwards continues to be made.

Consultative Questioning

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