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Certified Customer Success Management Professional
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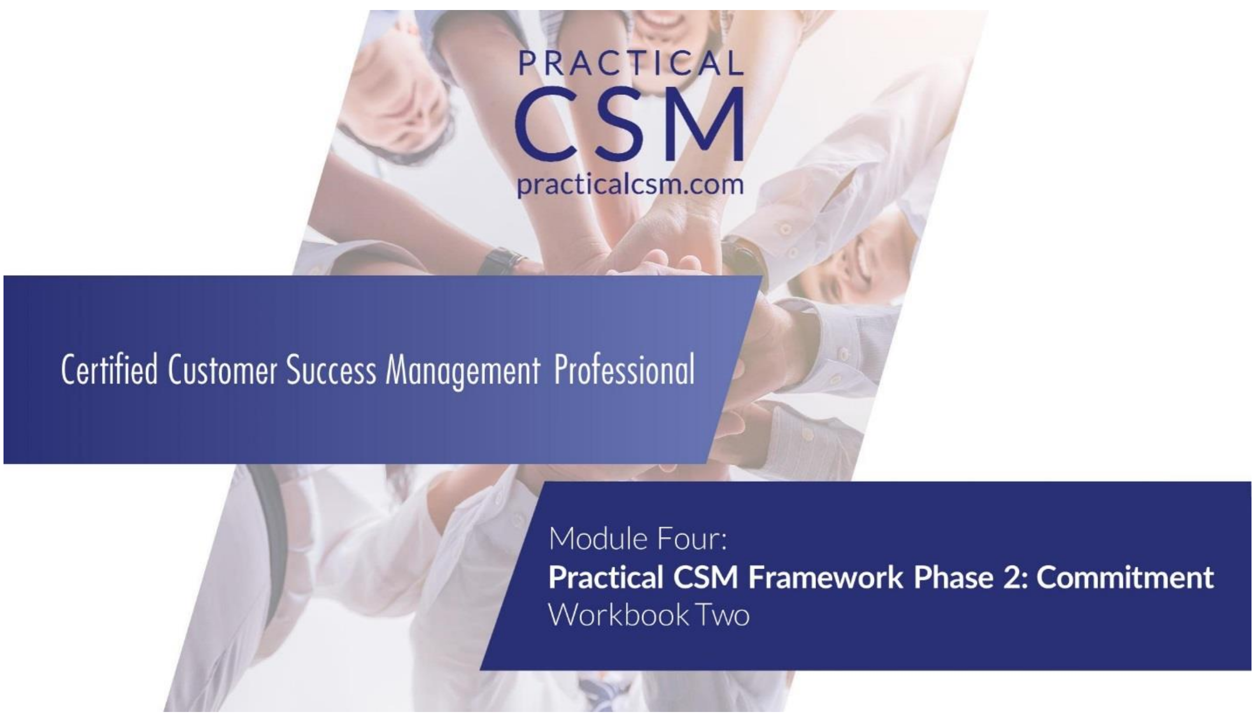
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Module Four:
Practical CSM Framework Phase 2: Commitment
Workbook Two

Welcome back to Module Four of the PracticalCSM.com Certified Customer Success Management Professional training course. As you know, this is the second Module that has covered one of the Phases of the Practical CSM Framework, in this case Phase Two: Commitment. In Workbook One we discussed 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.

In this second workbook for Module Four we're going to look at the practical side of things and focus first on a particularly important aspect not just of the Commitment phase but indeed of *all* phases throughout the entire customer engagement, which is the development and implementation of a Stakeholder Management Strategy, and then we will look at the role of the Customer Success Proposal in securing commitment from the customer in terms of the CSMs involvement in their initiative and the way in which the CSM will collaborate with the customer to help the customer achieve its desired outcomes. Before we start, I do want to point out that regardless of whether you use the tools and templates described here that are provided on the Academy site, or whether you use your own company's tools and templates, or even whether you don't use any templates at all, the concepts of both what to do and how to do it remain the same, and so the lessons are equally important to learn for all CSMs, regardless of the details of the way in which you will actually be working.

In Workbook Two we will be covering four tools to help with developing a strong stakeholder management strategy –the RACI Matrix, the Stakeholder Management Matrix, the Stakeholder Management Plan and the Customer Success Proposal Template

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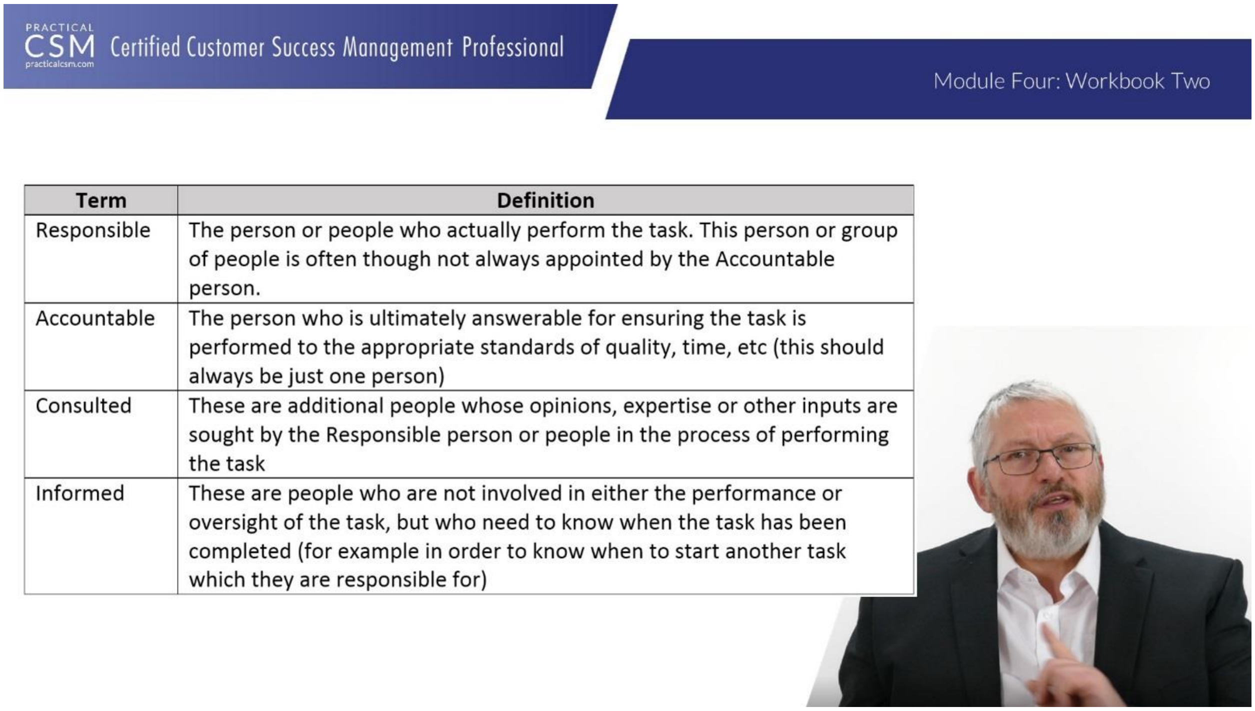
Module Four: Workbook Two

Using the RACI Matrix

R = Responsible
A = Accountable
C = Consulted
I = Informed

	Chief Finance Officer	EMEA Director of Finance	EMEA Director of Operations (SPL)	VP for Global Operations	VP for Global Sales & Marketing	EMEA Director of Production	EMEA Director of R&D	EMEA Director of Distribution	Chief Information Officer	EMEA Director of IT Systems
Determining scope of initiative	I	R	R	A	C	C	C	C	C	C
Creating the business case	I	I	R	A	C	C	C	C	C	C
Funding approval	R/A	R	I	I						
Providing information on impact to Sales workforce			R/A	I	C					
Providing information on impact to Marketing workforce			R/A	I	C					
Providing information on impact to Production workforce			R/A	I		C				
Providing information on impact to R&D workforce			R/A	I			C			
Providing information on impact to Distribution workforce			R/A	I				C		
Providing information on impact to IT workforce			R/A	I					C	C
Determining overall stakeholder impacts			R	A						
Creating onboarding plan			R	A	C	C	C	C	C	C
Approving onboarding plan	R/A	R	I	I						
Implementing onboarding plan		I	R	A	I	I	I	I	I	I
Creating adoption plan			R	A	C	C	C	C	C	C
Approving adoption plan	R/A	R	I	I						
Implementing adoption plan		I	R	A	I	I	I	I	I	I
Measuing and reporting (KPIs and milestones)		I	R	A						
Evaluating success and approving further phases	I	R/A	C	C						

Before we can begin to create a stakeholder management plan, we have to understand who the stakeholders are and what each stakeholder does. This is the purpose of the RACI Matrix. RACI is an acronym which stands for *responsible, accountable, consulted* and *informed.* The RACI Matrix comes from the world of project management and the idea is to identify which stakeholder or group of stakeholders are in turn responsible, accountable, consulted or kept informed for each task within a given project. To do this, we first need to be clear what we mean by each of these expressions.



Term	Definition
Responsible	The person or people who actually perform the task. This person or group of people is often though not always appointed by the Accountable person.
Accountable	The person who is ultimately answerable for ensuring the task is performed to the appropriate standards of quality, time, etc (this should always be just one person)
Consulted	These are additional people whose opinions, expertise or other inputs are sought by the Responsible person or people in the process of performing the task
Informed	These are people who are not involved in either the performance or oversight of the task, but who need to know when the task has been completed (for example in order to know when to start another task which they are responsible for)

The definitions for each are as follows:

Responsible: The person or people who actually perform the task. This person or group of people is often though not always appointed by the Accountable person.

Accountable: The person who is ultimately answerable for ensuring the task is performed to the appropriate standards of quality, time, etc (this should always be just one person)

Consulted: These are additional people whose opinions, expertise or other inputs are sought by the Responsible person or people in the process of performing the task

Informed: These are people who are not involved in either the performance or oversight of the task, but who need to know when the task has been completed (for example in order to know when to start another task which they are responsible for)

R = Responsible
A = Accountable
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	Chief Finance Officer	EMEA Director of Finance	EMEA Director of Operations (SPL)	VP for Global Operations	VP for Global Sales & Marketing	EMEA Director of Production	EMEA Director of R&D	EMEA Director of Distribution	Chief Information Officer	EMEA Director of IT Systems
Determining scope of initiative	I	R	R	A	C	C	C	C	C	C
Creating the business case	I	I	R	A	C	C	C	C	C	C
Funding approval	R/A	R	I	I						
Providing information on impact to Sales workforce			R/A	I	C					
Providing information on impact to Marketing workforce			R/A	I	C					
Providing information on impact to Production workforce			R/A	I		C				
Providing information on impact to R&D workforce			R/A	I			C			
Providing information on impact to Distribution workforce			R/A	I				C		
Providing information on impact to IT workforce			R/A	I					C	C
Determining overall stakeholder impacts			R	A						
Creating onboarding plan			R	A	C	C	C	C	C	C
Approving onboarding plan	R/A	R	I	I						
Implementing onboarding plan		I	R	A	I	I	I	I	I	I
Creating adoption plan			R	A	C	C	C	C	C	C
Approving adoption plan	R/A	R	I	I						
Implementing adoption plan		I	R	A	I	I	I	I	I	I
Measuing and reporting (KPIs and milestones)		I	R	A						
Evaluating success and approving further phases	I	R/A	C	C						

A simple example of how a CSM might use a RACI matrix within a customer success engagement to understand the different roles of customer stakeholders at different stages within the overall engagement is shown here, and a template for this tool called *Stakeholder_RACI_Matrix* is provided for you as a download.

The template has been created using Microsoft Excel. To use it, we recommend you first make a copy of the workbook and then edit the copy. That way you will always have the original to hand to re-use another time.

To use the Matrix will require a little bit of set up work, since all projects (or in this case customer initiatives) are different. The way the matrix works is that the titles for each activity within the initiative are listed in the first column so that each row becomes the row associated to a particular activity. Activities can be laid out in any order, but it usually makes logical sense to list them in time order, with the earlier activities appearing near the top and later activities listed beneath. The names or titles of each individual stakeholder or of each group of stakeholders who share a role are then listed in the first row, so that each column becomes the column associated with that stakeholder or stakeholder group. Note that the diagonal slanting effect of this row is used to provide sufficient legibility for longer titles that would otherwise require unfeasibly wide columns if the titles were written horizontally.

The first task for the CSM is to replace the example list of tasks or activities in the template with the actual list of tasks within the initiative, or within that part of the initiative that the CSM is creating the RACI Matrix for. The second task is to replace the example list of stakeholder titles and group names with the actual titles and group names for the stakeholders who play a role within the initiative as a whole or the relevant part of that initiative. At the end of these two steps, the template will have been customized to suit the specific requirements of the initiative (or part) in question. This may of course require more or less columns and rows to be used than those shown in the example in the template. Formatting from the samples can easily be copied across to additional rows and columns using the Format Painter tool within Excel.

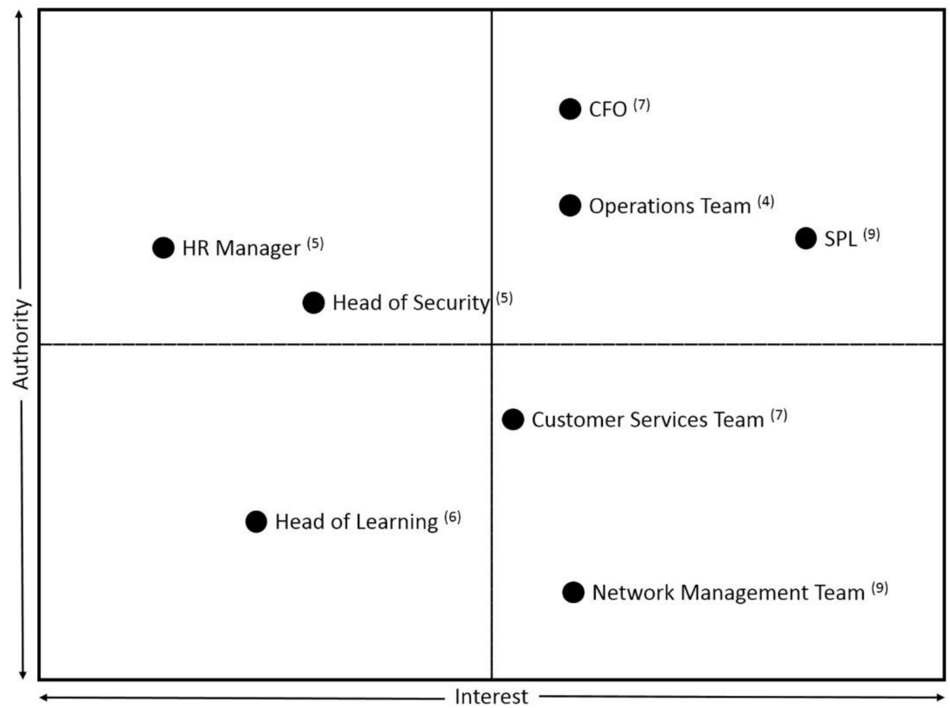
All that remains to be done is for the CSM to delete the example codes (R, A, C, I, etc) from the central part of the matrix and to replace them with the appropriate codes to denote the roles played by each stakeholder or stakeholder group for each activity or task. Remember that you can have as many different stakeholders as you wish denoted as being responsible, consulted and informed, but you should only have one stakeholder or stakeholder group whom you specify as accountable, as this enables true accountability to be maintained throughout the project or initiative.

It is entirely possible of course that at this fairly early stage in the engagement, the customer success manager does not know either all the activities that will take place nor all the stakeholders who will be playing a role in those activities. That's fine though – the CSM shouldn't expect to be able to know and document everything at this point, so it's OK to keep the initial RACI Matrix fairly high level and general in terms both of tasks and people. For example instead of detailing every activity and every individual stakeholder, your RACI Matrix might list activity groups and customer departments.

As you work with the customer over the days, weeks and months ahead, you can return to the RACI Matrix and either update the first matrix or create new matrices that provide the additional details that have now been uncovered and agreed.

The point of the RACI Matrix at this early stage is more about enabling the CSM to start to get familiar with the customer organization and to begin to make sense of who the stakeholders are and what their involvement within the customer's initiative is, than it is about project planning or assigning roles and responsibilities. The RACI Matrix may be useful for these reasons later on – particularly in Phases 4 and 5 that deal with Adoption Planning and Adoption Implementation which are perhaps likely to be the most complex phases in terms of their project management requirement. For now however it is fine to consider the RACI Matrix purely as a discussion tool which can be used with the CSM's company's Account Manager, the customer's SPL (or Senior Project Lead) and others to draw out information about who the stakeholders are and what involvement they have or will in the future have within the initiative.

The RACI Matrix is very much a project management tool. It provides a great way to identify who from both within and outside of the customer's organization will be performing the different roles relating to each task that need to be completed. The purpose of the Stakeholder Management Matrix is quite different. This tool comes from the world of selling, and its purpose is not to define what each stakeholder (either individual or group) does within the initiative, but instead to determine each stakeholder's level of importance to the initiative.



To do this, the Stakeholder Management Matrix combines three pieces of data about each key stakeholder (and it really is only the key stakeholders that would typically be included within the Stakeholder Management Matrix.) These three pieces of data are: The level of authority (or influence) each key stakeholder has over decision making, the level of interest (or concern) each key stakeholder has about the initiative, and the level of support for the initiative (positive or negative) each stakeholder is providing.

Here is an example of a Stakeholder Management Matrix that has been completed for a customer initiative. As you can see, the horizontal or X axis is labelled “Interest”, so positioning a Stakeholder further to the left indicates less interest and positioning a Stakeholder further to the right indicates more interest. Similarly, the vertical or Y axis is labelled “Authority”, and positioning a Stakeholder further to the bottom indicates less authority whereas positioning a Stakeholder further to the top indicates more authority.

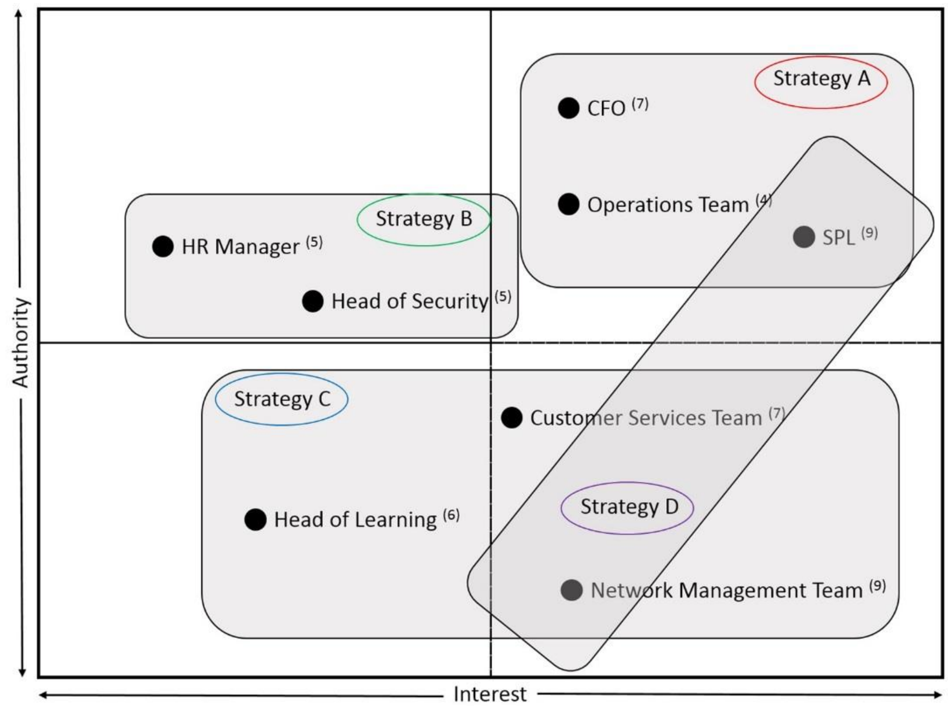
Being a two dimensional matrix there is no third axis on which to display the level of support, so instead, each Stakeholder is given a number. This number could for example be from -5 (ie very against the initiative) to +5 (ie very supportive of the initiative), with 0 being a neutral position. Alternatively the CSM might simply give each Stakeholder a value from 0 to 10 where 0 means “highly unsupportive” and 10 means “highly supportive”, as shown in this example.

The point of the Stakeholder Management Matrix is twofold:

Firstly it enables the CSM to view all key stakeholders together as an overall stakeholder team, in order to determine patterns of similarity and difference between them and to consider how they combine and work together to determine the overall direction of the initiative.

Secondly, it provides a start point for determining any specific stakeholder management strategy for both the team as a whole and for each individual key stakeholder. For example, the two most supportive key stakeholders are the SPL and the Network Management Team (both indicating a support level of 9). Perhaps the CSM might want to think about how to use these highly supportive stakeholders to influence other, less supportive key stakeholders such as the Operations Team to become more supportive. Alternatively or additionally, perhaps the CSM sees that although the HR Manager is reasonably senior in terms of decision making for the initiative they are neutral in their support for it and also disinterested in it. Perhaps this data indicates to the CSM the possibility that because the HR Manager is both unconcerned and uninterested in the initiative yet remains an influential decision maker for it, this could cause delays or roadblocks in the smooth progress of the initiative, and the CSM therefore determines the need for a strategy either to make the HR Manager less influential within the initiative, or to make them more concerned about it and/or supportive of it.

The first task of the CSM then is (with the help of their colleagues as necessary, and perhaps even involving a customer stakeholder such as the SPL if the CSM feels they have developed a sufficient level of trust relationship with them) to identify the different stakeholders and stakeholder groups who will be involved in the initiative. Once the customer success manager has done this and also determined their roles (perhaps using the RACI Matrix) and for key stakeholders their levels of authority, interest and support (perhaps using the Stakeholder Management Matrix), the CSM should be in the position to be able to start planning any stakeholder management activity that may be necessary.



In this example of the Stakeholder Management Matrix we see that the CSM has determined the need for four strategies. Strategy A will be a strategy to work closely with those key stakeholders who are both important to the initiative because of their senior level of authority and who indicate a high level of interest or concern about the project. Strategy B will be a strategy to try to reduce the fairly senior level of authority exhibited by the HR Manager and Head of Security since neither of them exhibit much interest or support for it. Strategy C will be a strategy to monitor and keep informed the remaining key stakeholders, but not to work with them so closely as will be done with CFO, SPL and Operations Team, since they are less influential in the initiative's decision making processes. Finally Strategy D will be a strategy to utilize the high level of support shown by the Network Management Team and SPL to evangelize the initiative to others both within and outside of the project and build more support for it.

These strategies need to be planned and those plans need to be documented. For each strategy there needs to be at least some idea of what needs to be done, when it needs to be done by, who will be doing those things, how they will do them and how the results will be measured. This is the purpose of the next tool we will look at, which is the Stakeholder Management Plan tool, which again can be accessed from the Downloads section at PracticalCSM.com.

The Stakeholder Management Plan tool is another Excel workbook, and the template that you download contains just one worksheet labelled “Month 1”. The idea of the Stakeholder Management Plan tool is of course to document the stakeholder management plan, but it is essential to monitor stakeholder management progress regularly and to update the plan to account both for progress made in executing the stakeholder management strategies and also in changes to the initiative itself and/or to those stakeholders who have been identified as being important to the initiative.

The Stakeholder Management Plan tool is a very simple tool to use. Each row denotes a stakeholder (or stakeholder group) and the row represents the management strategy for that stakeholder or group. If there are multiple strategies for one stakeholder or one stakeholder group then of course multiple rows can be used – one row for each strategy.

Stakeholder Management Plan Tool: First Eight Columns (A to H)

	A	B	C	D	E	F	G	H
1	**Name**	**Job role**	**Relevance**	**Seniority level**	**Authority**	**Interest**	**Support**	**Primary desires**
2	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1
3	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2
4	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3
5	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4	stakeholder 4
6	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5	stakeholder 5
7	stakeholder 6	stakeholder 6		6	stakeholder 6	stakeholder 6	stakeholder 6	stakeholder 6
8	stakeholder 7	stakeholder 7		7	stakeholder 7	stakeholder 7	stakeholder 7	stakeholder 7
9	stakeholder 8	stakeholder 8		8	stakeholder 8	stakeholder 8	stakeholder 8	stakeholder 8
10	stakeholder 9	stakeholder 9		9	stakeholder 9	stakeholder 9	stakeholder 9	stakeholder 9
11	stakeholder 10	stakeholder 10		10	stakeholder 10	stakeholder 10	stakeholder 10	stakeholder 10
12	stakeholder 11	stakeholder 11		11	stakeholder 11	stakeholder 11	stakeholder 11	stakeholder 11
13	stakeholder 12	stakeholder 12		12	stakeholder 12	stakeholder 12	stakeholder 12	stakeholder 12
14	stakeholder 13	stakeholder 13		13	stakeholder 13	stakeholder 13	stakeholder 13	stakeholder 13
15	stakeholder 14	stakeholder 14		14	stakeholder 14	stakeholder 14	stakeholder 14	stakeholder 14
16	stakeholder 15	stakeholder 15		15	stakeholder 15	stakeholder 15	stakeholder 15	stakeholder 15
17	stakeholder 16	stakeholder 16	stakeholder 16	stakeholder 16	stakeholder 16	stakeholder 16	stakeholder 16	stakeholder 16
18	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17	stakeholder 17
19	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18	stakeholder 18
20	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19	stakeholder 19
21	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20	stakeholder 20
22	stakeholder category 1	stakeholder category 1	stakeholder category 1	stakeholder category 1	stakeholder category 1	stakeholder category 1	stakeholder category 1	stakeholder category 1
23	stakeholder category 2	stakeholder category 2	stakeholder category 2	stakeholder category 2	stakeholder category 2	stakeholder category 2	stakeholder category 2	stakeholder category 2
24	stakeholder category 3	stakeholder category 3	stakeholder category 3	stakeholder category 3	stakeholder category 3	stakeholder category 3	stakeholder category 3	stakeholder category 3
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26	stakeholder category 5	stakeholder category 5	stakeholder category 5	stakeholder category 5	stakeholder category 5	stakeholder category 5	stakeholder category 5	stakeholder category 5
27	stakeholder category 6	stakeholder category 6	stakeholder category 6	stakeholder category 6	stakeholder category 6	stakeholder category 6	stakeholder category 6	stakeholder category 6
28	stakeholder category 7	stakeholder category 7	stakeholder category 7	stakeholder category 7	stakeholder category 7	stakeholder category 7	stakeholder category 7	stakeholder category 7
29	stakeholder category 8	stakeholder category 8	stakeholder category 8	stakeholder category 8	stakeholder category 8	stakeholder category 8	stakeholder category 8	stakeholder category 8
30	stakeholder category 9	stakeholder category 9	stakeholder category 9	stakeholder category 9	stakeholder category 9	stakeholder category 9	stakeholder category 9	stakeholder category 9
31	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10

Note: Delete any unused rows and/or add further rows to suit the numbers of stakeholders and stakeholder categories you are creating management strategies for.

At the end of month 1 make a copy of the Month 1 worksheet and label it Month 2 and then amend this sheet for the new month. Repeat this each month to build up an archive of your stakeholder management plan over time.

The different column headings are:

Name: The name of the stakeholder or a title for the stakeholder group

Job role: The job title of or other role-related description for the stakeholder or stakeholder group

Relevance: A description of the relevance that the stakeholder or stakeholder group's job role has to the initiative

Seniority level: The stakeholder or stakeholder group's level of seniority within the customer organization

Authority: The level of authority or influence they have over decision making related to this initiative (from 0 to 10)

Interest: The level of interest or concern they have regarding the outcomes and/or strategy for attaining those outcomes within this initiative (from 0 to 10)

Support: The level of support they have for the SPL and CSM in terms of their plans for this initiative (from 0 to 10)

Primary desires: The most important desires for what they want the initiative to include or deliver

Stakeholder Management Plan Tool: Remaining Columns (I to Q)

	I	J	K	L	M	N	O	P	Q
1	**Primary concerns**	**Notes**	**Category**	**Current situation**	**Desired situation**	**Specific Strategy**	**Assigned to**	**Deadlines**	**Measurement**
2	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1	stakeholder 1
3	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2	stakeholder 2
4	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3	stakeholder 3
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31	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10	stakeholder category 10

Primary concerns: The most important concerns they have over the initiative

Notes: Any additional information about the stakeholder or stakeholder group which it is important to note

Category: The stakeholder category that you have classified this stakeholder or stakeholder group into

Current situation: A summary of the stakeholder’s current opinion and related activities regarding the initiative

Desired situation: A summary of the CSM’s desired stakeholder’s opinion and related activities regarding the initiative

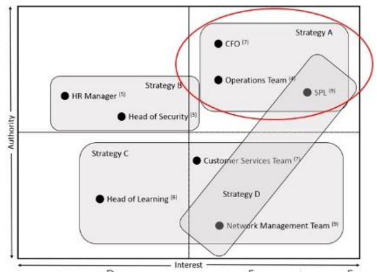
Specific Strategy: A brief explanation of any specific activities or interactions that will occur with this stakeholder or stakeholder group

Assigned to: The name of the person responsible for carrying out the strategy

Deadlines: Any specific dates by which certain parts of the strategy must be completed (if relevant)

and

Measurement: A description for how the strategy’s success will be measured (if relevant)



	A	B	C	D	E	F	G	H	I
1	Strategy	Name	Job role	Relevance	Seniority level	Authority	Interest	Support	Primary desires
2	A	John Ashton	CFO	Financial decision making	10	8	6	7	Manage budget wisely, show a ROI
3		Terence King, Wayne Anderson, Letitia Ambrose	Operations Management Team	Using the new service to generate customer outcomes	6	7	6	4	Minimize disruptions to service, reduce risk, maintain productivity
4		Sue Saunders	SPL	Project manager for the initiative	6	6	8	9	Smooth running of the intiiative and generation of customer outcomes

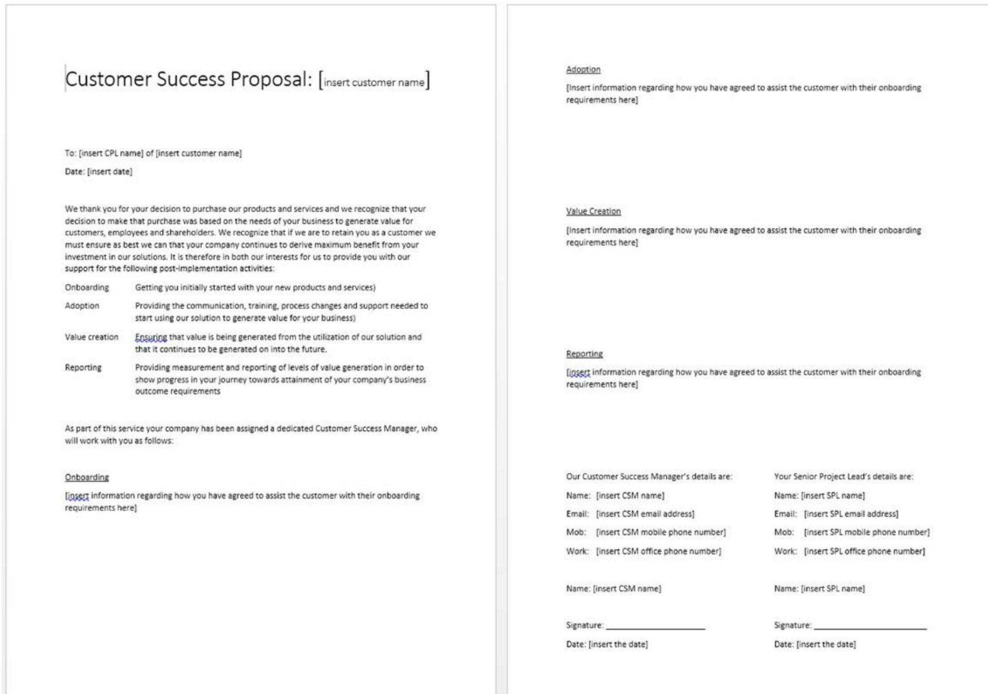
	J	K	L	M	N	O	P	Q	R
1	Primary concerns	Notes	Category	Current situation	Desired situation	Specific Strategy	Assigned to	Deadlines	Measurement
2	Reduce costs, maximize returns, measurements	Easy to work with, but has a very detailed approach and requires regular progress briefings	High Priority	All good	Remain good	Weekly reporting by email, face-to-face meeting every month	CSM and Account Manager	Fridays by close of play, plus 25th of each month	Sentiment of each stakeholder, to be recorded in the Stakeholder Management Matrix
3	Amount of time taken away from core tasks to undergo training	Need to increase support							
4	Keeping senior decision makers happy and preventing any roadblocks	Great relationship							

If the CSM is at least a little familiar with using Excel, they can use the "Merge and Center" function to link rows together where a single strategy will span multiple stakeholders and/or stakeholder groups. An example of this using "Strategy A" from the Stakeholder Management Matrix that we discussed previously is shown here. Note that an extra column called "Strategy" has been added in to provide a way to identify each specific strategy, since the name of the stakeholder will not now be used to perform this task.

Updating the stakeholder management plan should be at least a monthly activity, so once the CSM has completed a plan for Month 1, they can then make a copy of that worksheet and edit the copy to create a new and amended version of the plan for Month 2, and so on.

(To copy an entire worksheet in Microsoft Excel, right-click the tab of the worksheet you wish to copy and select the "Move or Copy" option, then check the "Create a copy" checkbox in the pop up window and select OK. The new worksheet will now be displayed and its name can be edited by double-clicking its tab.)

The final tool from Phase 2: Commitment is a template proposal document. Phase 2 of the Practical CSM Framework is called "Commitment" because by the end of this phase, the customer success manager needs to have secured a commitment from the customer to use their help and assistance to attain their desired outcomes from their initiative. This commitment should include information about what the customer wants done at each major stage of their journey towards outcome attainment and in what ways the CSM will be involved, as well as how they will work with the customer in order to deliver this assistance.



Customer Success Proposal: [insert customer name]

To: [insert CPL name] of [insert customer name]

Date: [insert date]

We thank you for your decision to purchase our products and services and we recognize that your decision to make that purchase was based on the needs of your business to generate value for customers, employees and shareholders. We recognize that if we are to retain you as a customer we must ensure as best we can that your company continues to derive maximum benefit from your investment in our solutions. It is therefore in both our interests for us to provide you with our support for the following post-implementation activities:

Onboarding	Getting you initially started with your new products and services)
Adoption	Providing the communication, training, process changes and support needed to start using our solution to generate value for your business)
Value creation	Ensuring that value is being generated from the utilization of our solution and that it continues to be generated on into the future.
Reporting	Providing measurement and reporting of levels of value generation in order to show progress in your journey towards attainment of your company's business outcome requirements

As part of this service your company has been assigned a dedicated Customer Success Manager, who will work with you as follows:

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[insert information regarding how you have agreed to assist the customer with their onboarding requirements here]

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Reporting

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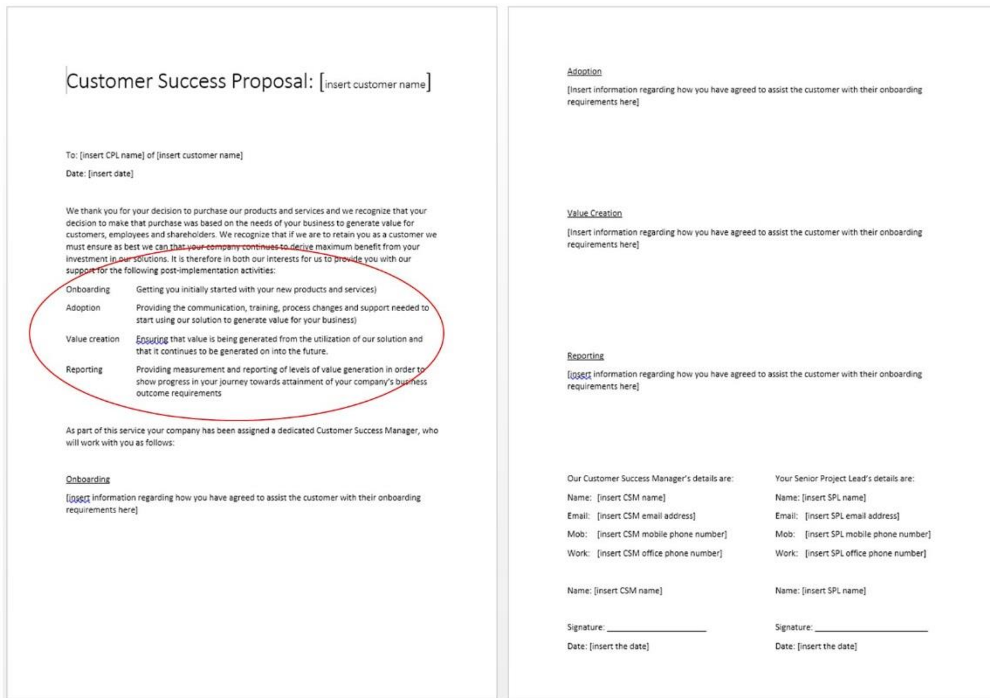
Mob: [insert CSM mobile phone number]	Mob: [insert SPL mobile phone number]
Work: [insert CSM office phone number]	Work: [insert SPL office phone number]
Name: [insert CSM name]	Name: [insert SPL name]
Signature: ____________	Signature: ____________
Date: [insert the date]	Date: [insert the date]

The proposal document is provided in Microsoft Word format, and has deliberately been kept simple because we recognize that every organization has its own branding, look and feel and content style for its proposals. However it may be useful to download and review the Customer Success Proposal template in order to copy all or some of the ideas contained within it into your own organization's proposal document.



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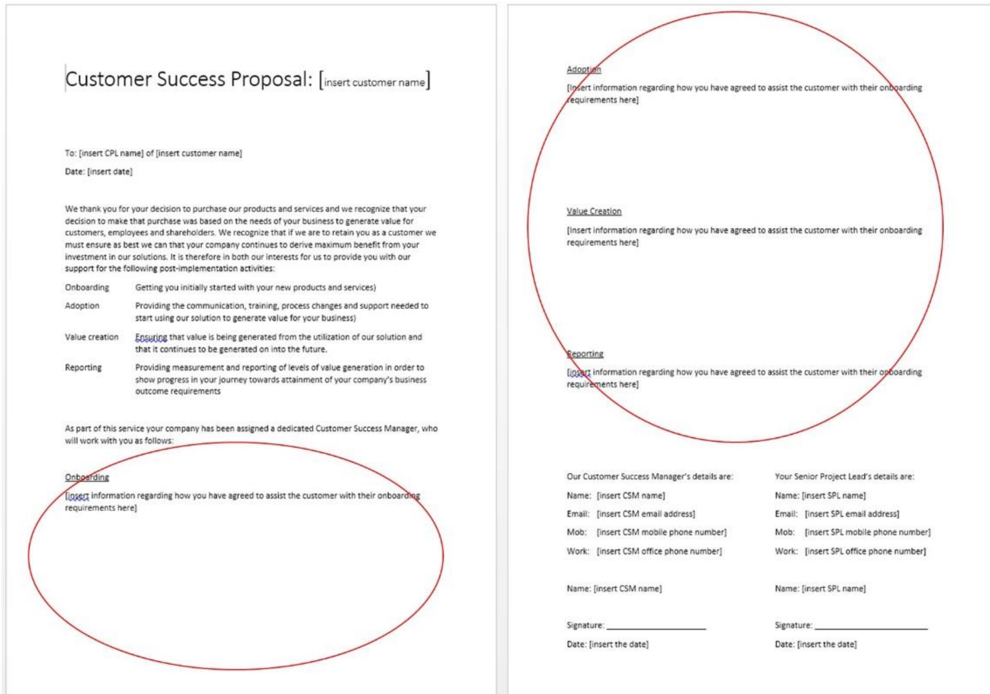
The first section of the customer success proposal template explains the four aspects of customer success that the CSM will engage with them around, these being Onboarding, Adoption, Value Creation and Reporting.



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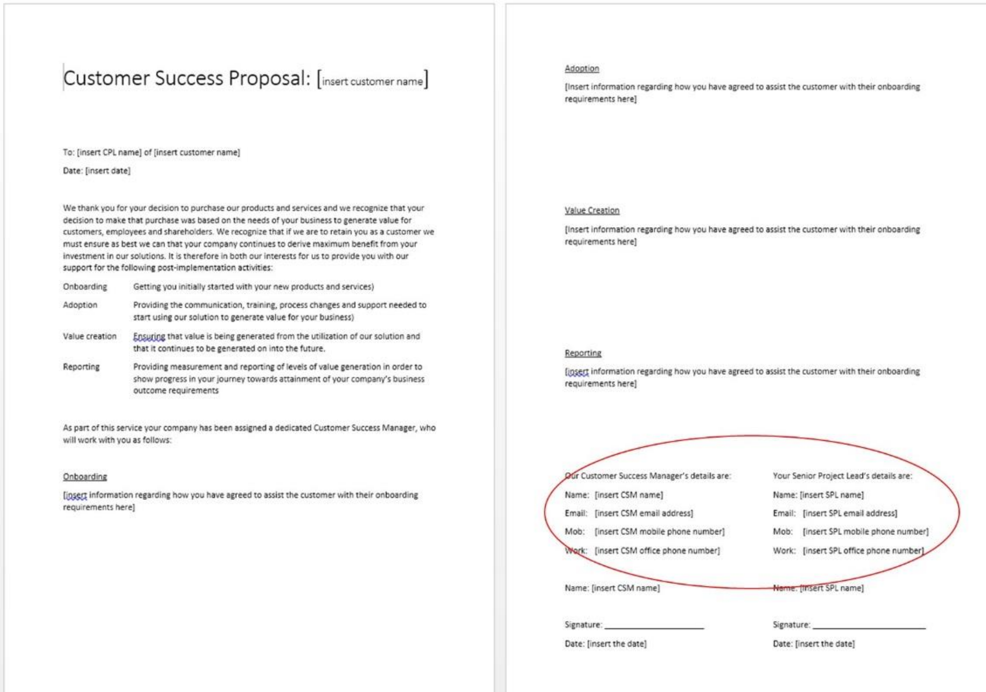
The second part of the document provides a heading for each aspect under which the specific details relating to the particular engagement can be noted. This might include both activities and outcomes, and may also reference deadlines or milestones for achievement of certain targets. It is entirely up to the CSM (in negotiation with the customer's stakeholders) to determine what needs to go in to the proposal.



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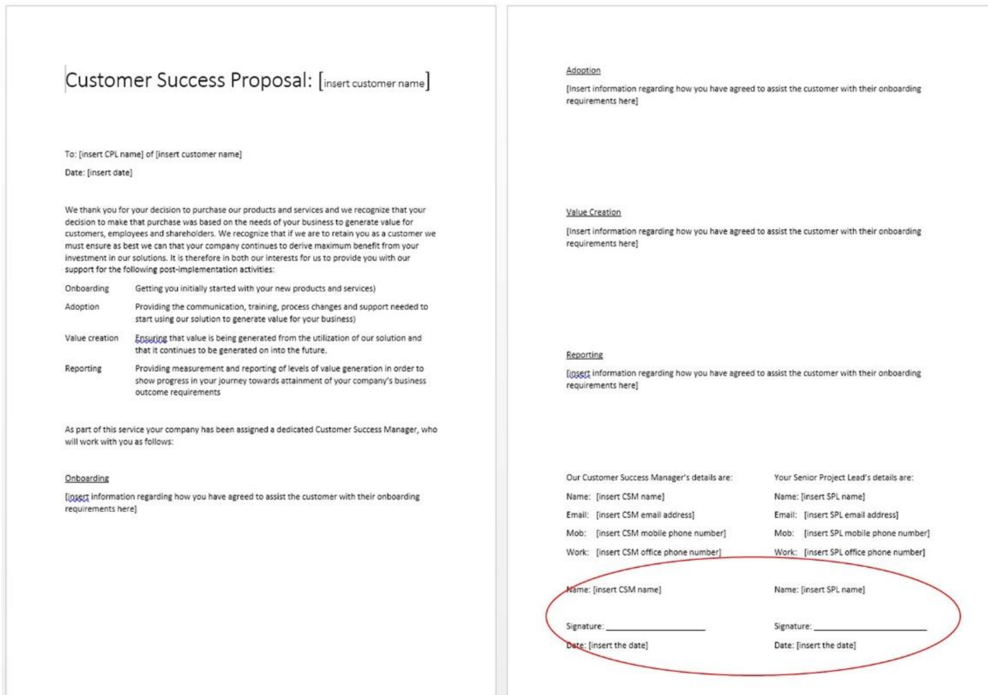
The third and final part of the template identifies each party's key stakeholder and their contact information, these being the Customer Success Manager for the supplier and the Senior Project Lead (SPL) for the customer.



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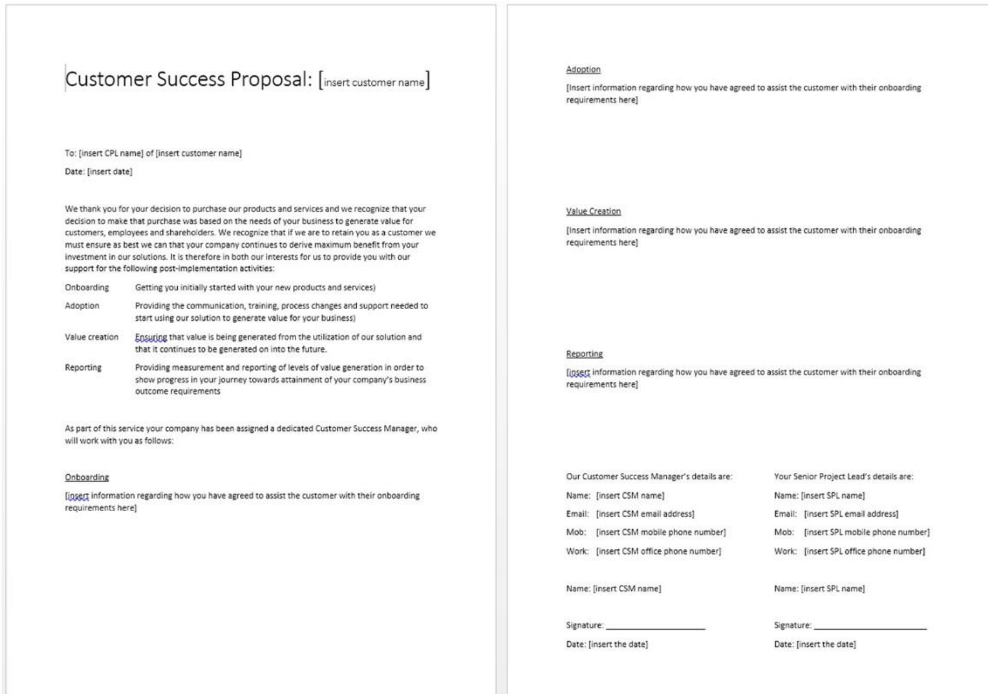
The proposal can then be signed and dated by each key stakeholder and can then serve as a reference point from which all activity from henceforth can be developed.



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Note that the Customer Success Proposal is deliberately kept simple. It is not intended to be a sophisticated or lengthy document, but instead to be a "working document" that is written in plain language and which can be used as a useful reference at all stages of the engagement. That said, it may be necessary for companies to consider adding or at least referencing legal disclaimers and/or contractual terms and conditions. These types of inclusions have been left for each individual company to determine and add as appropriate.


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CSM
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Certified Customer Success Management Professional
CCSMP