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Module Eight:  
**Practical CSM Framework Phase 6: Value Realization**  
Workbook Three

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I know I've said this before, but it's worth repeating that this is such a critical phase for customers and suppliers alike, and yet also one which it might be easy to overlook or not devote sufficient time and energy to, since on completion of Phase 5: Adoption Implementation it can feel like the hard work is over, and you can now safely leave your customer to get on with using your products and/or solutions on their own, whilst you devote your time to helping other customers who are still going through their onboarding and adoption phases.

In one sense this is true, in that it is likely that both the quantity and intensity of your work with any one customer is likely to be greatest during Phases 3 to 5 that deal with onboarding, adoption planning and adoption implementation respectively. However, even though the rhythm of your workload with this individual customer might change once you reach Phase 6, the importance of that work most definitely does not change and arguably becomes even more critical, since of course it is during this longer phase that (from the supplier's perspective) all renewals and additional sales to the customer will occur and (from the customer's perspective) actual value and progress towards outcome attainment takes place.

This is why we are taking extra time over two additional workbooks to ensure that we cover the topic of Value Realization in sufficient depth.

## Practical CSM Framework Phase 6: Value Realization – Agenda

- Working to the Customer's Agenda
- Problem Solving
- The Role of the CSM in Sales Activities



In Workbook Three we will be discussing the need to work to customers' agendas, not just the CSM's company's agenda, problem solving and using root cause analysis to help resolve complex problems, and the roll of the CSM in sales activities. Let's get straight to it...



## Working to the Customer's Agenda



You may recall that in the previous training module we finished up by saying that whereas from the CSM's or the supplier's perspective the work has largely been completed by the end of Practical CSM Phase 5: Adoption Implementation, from the perspective of the customer the hard work of realizing the value from the products and services they have purchased does not even begin until they have reach Phase 6: Value Realization.

In the past, prior to the rise of customer success management as a core aspect of the overall customer experience that suppliers delivered to their customers, this dichotomy between the perspectives of buyer (or customer) and seller (or supplier) sometimes caused friction. From the perspective of the customer it sometimes felt as though as soon as the sales phase was over, their suppliers were no longer interested in them and weren't prepared to spend as much time or energy in helping the customer to actually use their products and services to do the all-important part of creating outputs that lead ultimately to outcome fulfilment as they were in selling them the products and services and ensuring they were implemented and adopted. It may indeed have felt like suppliers were telling their customers that value realization was "their problem" rather than being a mutual issue that was relevant to both customer and supplier alike.

Times have changed however, and the core concept behind CX (customer experience) is that the entire customer journey from beginning to end is all equally important for suppliers to manage and to enhance as best they can. This of course includes post sales elements of that journey, namely the value realization stage.

## Suppliers Need Customers to Remain as Customers

- Customers are far more likely to purchase more products and services from a company they have previously made purchases from if they know that:
  - Those previous purchases turned out to be good decisions
  - The desired outcomes from making those purchases were achieved



Why do suppliers want customers to remain pleased with their purchases right past the sales stage and on into the value realization stage? Well for some companies it may indeed have some elements of ethical altruism that make up a corporate culture that believes in ensuring that customers get the outcomes they were promised they would get. But leaving aside any ethical issues, the cold hard facts are that customers are far more likely to purchase more products and services from a company they have previously made purchases from if they know that those previous purchases turned out to be good decisions, and that the desired outcomes from making those purchases were achieved (or at least are in the process of so doing).

This is just purchasing common sense. After all, would you continue to purchase a particular company's brand of razor blades if every razor blade you purchased turned out to be blunt? Of course not, you'd switch brands and try a competitor's product. Some customers might hold out for longer than others, either out of (potentially misplaced) loyalty or simply out of laziness or business, since it might take some effort to find a suitable replacement. But eventually most if not all existing customers would be lost to better competitors whose products actually worked.

As for consumers, so for businesses. Would a business be likely to renew its contract for a software-as-a-service application that was too complicated for users to understand, or too time consuming for them to use efficiently, or too unreliable to be trusted with important tasks? The answer is "No, of course it wouldn't." Just like the consumer with the razor blades, the business would take its custom elsewhere and go and find a competitor with a comparable product which actually worked. Again as with consumers it may take some business customers longer than others to get around to switching suppliers due to various reasons such as loyalty and available time and resources to research, purchase and adopt

a new product, but eventually the majority of customers would cease to renew their contracts and switch to competitors' offerings. Of course they would. I would.

## Realizing Value Vs Attaining Value

- Senior decision makers need to be shown how much value is being realized from an initiative in order to:
  - Renew service contracts
  - Sanction additional spending rounds for further initiative phases
  - Sign off on the success of an initiative
- CSMs must make sure they get this information



So here's the thing. Perception is so important here. What if the customer is actually getting value from their product or service, but they don't realize it? Or to be more precise, what if the senior decision makers who decide whether or not to renew the service contract or repurchase the replacement product don't realize that value is being attained? What happens then?

Arguably of course it could be stated that if it's their job to make those sorts of decisions on behalf of their company, then surely it is also their job to make sure they find out these things, in order to put themselves in the position to be able to make an informed decision rather than an uninformed one. I would tend to agree with that sentiment, however if it was my company who was the incumbent supplier, I would not see that as any reason not to take on the responsibility myself of *making sure they do realize the value*, since it is in my own company's interests (and indeed in my own personal interests if I am an account manager or a customer success manager or anyone else who is measured and partially remunerated based upon renewals of services or sales of replacement products) that we maximize the likelihood of them renewing the new contract or placing the new contract for the replacement products.

### What is the Customer's Agenda?

- It is no longer sufficient to leave the responsibility to customers alone to make sure the initiative is working and that success is being adequately measured, analyzed and reported to decision makers
- Customers increasingly select suppliers based not just on the product or service but on the supplier's willingness and ability to make the initiative successful



To put it simply the statement “the customer is responsible for making it work” or even the statement “the customer should know whether it’s working or not” is no longer good enough. The world is too competitive and customers have lots of choice and too little time. They want suppliers who can help them not just with selecting, installing and getting up to speed on using the product or service, but also with helping them to measure and prove the amount of value being returned by that product or service. This is what they’re looking for, because this is what makes their lives easier by reducing the number of things that they themselves have to worry about getting done.

If you learn nothing else on this course (and I hope you have already learned a lot from our time together), I hope that you will agree with me that what CSMs must learn to do is to find the difficult or awkward or time consuming things that key customer stakeholders find hard to get around to doing and either help them to do those things, or better still do those things for them. Of course this doesn’t mean we need to become our customer’s butler and start shining their shoes for them or cleaning their car, etc. We need to remain rational about it and we need to be able to justify our time in terms both of activities that help the customer and activities that help our own company. But nevertheless the concept of taking away the pain and making our customers’ lives easier by doing the things they find difficult, awkward or time consuming to do but which need to be done in order to both deliver and prove the value from them using our company’s products and services is an important one.

### Problem Solving: What if the Value is Not Being Attained?

“In situations where measurements are taken that show that the desired value is not being attained from the customer’s initiative, the task of the CSM is to help the customer as best as possible to turn the situation around such that the products and/or services *do* generate value for the customer”



So what we’ve said so far then, is that one of the key duties for CSMs during Phase 6: Value Realization is to ensure that the value that is being attained is measured, analyzed and reported to the customers’ decision makers. This is so that these decision makers have the information needed to be able to make the decision to renew service contracts and replace products, on the basis that value is being realized currently and therefore it makes sense for them to ensure that this value continues to be realized.

But how about if measurements are being taken, analyzed and reported that show that value is *not* being attained, or at least not being attained as much as the customer desires or requires it to be? Well this type of situation is of course of equal if not even greater importance for the CSM to step in and deal with than our first scenario. In this situation the task of the CSM is to help the customer as best as possible to turn the situation around such that the products and/or services *are* generating value for the customer. Of course this may be a lot easier said than done, and there are many reasons why a product or service may be failing to deliver the required or desired value for which it was purchased. The start point to fixing the problem is to find out why the value is not being created. This is referred to sometimes as *root cause analysis* and we will take a look at how the CSM might go about performing this activity.

## What is Root Cause Analysis?

- Before looking for root causes, the CSM must make sure that outcome requirements are properly defined and documented
- Root cause analysis is a technique to determine the underlying cause of a problem, so that this underlying issue can be fixed in order to reduce the likelihood of its reoccurrence



First though, and before even this start point can be reached, CSMs are advised to check back in their documentation to make sure that the desired and/or required outcomes for the initiative have been correctly identified, since it is possible sometimes that customers might inadvertently (or even on occasions deliberately) move the goalposts and may now be attempting to attain unrealistic outcomes that are simply unachievable. This of course can be very easily done simply by reviewing the Customer Engagement Strategy (or similar) that the CSM created during Practical CSM Framework Phase 1: Preparation and the Customer Success Proposal and Customer Success Contract (or similar) that the CSM created during Practical CSM Framework Phase 2: Commitment.

Once the CSM is reassured as to the correct outcomes and/or significant milestones that have been agreed between the supplier and customer, the CSM can start work on root cause analysis. The idea of root cause analysis is to determine the real or underlying cause of the problem, so that this underlying issue can be fixed and in so doing the problem can be resolved in a way that reduces the likelihood of its reoccurrence as much as possible.



For example if you have a headache then one possible cure for the headache might be to take a painkiller such as paracetamol or aspirin. This painkiller may well reduce or even entirely remove the feeling of pain that the patient is experiencing, but the underlying cause – the reason why they were getting the headaches in the first place – has not been dealt with. Perhaps this underlying problem will fix itself without any intervention needed, in which case all will be fine. If not however, then when the effects of the pain killer have worn off, the patient will be back again experiencing the same headache as before.



Perhaps the underlying problem or the *root cause* of the problem is discovered to be dehydration. If this is the case, and if the patient is rehydrated – for example by drinking a glass or two of water – then the chances are that over time the pain will go away without the need for a pain killer, since the root cause of the pain has itself gone away. Of course it is also entirely possible that even if as in this example the underlying problem is addressed, it might take a while for the effects of this fix to be felt. In our example it might take a while even after our patient has drunk the water for all the cells in the patient’s body to rehydrate back to their normal, hydrated state. In this circumstance, it might be a good idea for the patient to both treat the root cause of their problem by taking on liquids and also simultaneously treat the symptoms of pain by taking a pain killer. In this situation the existing discomfort associated with dehydration is treated as well as the underlying issue, so that the patient both feels well in the short term and continues to feel well in the longer term.

## Root Cause Analysis Steps

- Step 1: Define the problem and explain its impact
- Step 2: Define the process
- Step 3: Identify possible causes
- Step 4: Identify and implement countermeasures
- Step 5: Test for resolved



## Root Cause Analysis Steps

Here are the steps for using root cause analysis:

Step 1: Define the problem and explain its impact

Step 2: Define the process

Step 3: Identify possible causes

Step 4: Identify and implement countermeasures

Step 5: Test for resolved

### Root Cause Analysis Step 1: Define the problem and explain its impact

- Remain focused on the facts rather than emotions or opinions
- Make sure to describe the problem fully and avoid jumping too quickly to solution mode
- “The Five Ws” is one good way to define the problem (what?, when?, where?, who?, why? and how?)



When identifying and defining the problem and the impact it is having, make sure you remain focused on the facts rather than emotions or opinions, and on describing the problem rather than jumping too quickly to solution mode. “The Five Ws” is one good way to define the problem (what, when, where, who, why and how).

“5.1% of products sold are currently being returned by customers as faulty within the warranty period of 12 months. This level of returns is approximately twice the average for our industry as a whole of 2.6%. This problem is causing customers to be frustrated with our products and losing us an estimated \$15m pa in repair and replacement costs combined with lost sales opportunities due to damaged brand reputation, compared with if our returns rate was at the industry average.”

### Example



An example of a well-defined problem would be:

5.1% of products sold are currently being returned by customers as faulty within the warranty period of 12 months. This level of returns is approximately twice the average for our industry as a whole of 2.6%. This problem is causing customers to be frustrated with our products and losing us an estimated \$15m pa in repair and replacement costs combined with lost sales opportunities due to damaged brand reputation, compared with if our returns rate was at the industry average.

### Root Cause Analysis Step 1: Define the problem and explain its impact

- If relevant and desirable, you might at this stage provide a stop-gap solution or a “workaround”
- This enables continuity of service (even if potentially at a reduced level) whilst you determine the root cause, find a permanent fix for the problem and implement that fix



If relevant and desirable, you might at this stage provide a stop-gap solution or a “workaround” such as temporary hosting of a mission critical application at a third party datacentre whilst you get to the bottom of the problem that is occurring in your own datacentre, or the diversion of orders to another production line or even another factory whilst you work on getting the problem fixed on this production line.

## Root Cause Analysis Step 2: Define the process

- Be careful not to blame people in situations where issues relating to their activities are actually due to a problem with:
  - Process
  - Tools
  - Training and/or support



As you know from Module 2, there are three aspects of any business capability – people, process and tools. All too often the problem is blamed on people when really it is to do with the process, or with the tools or the training and support of the people, not the people themselves.

## Root Cause Analysis Step 2: Define the process

- To identify what is happening the recommendation is for you (or a relevant person) to:
  - Visit the place where the problem is occurring
  - Talk to the people who are involved
  - Record and document what is happening
  - Create a workflow diagram or process map



To identify what is happening (Step 1) or to start gathering information about the circumstances in which the problem occurs, the recommendation is for you (or someone) to actually go to the physical place where the problem occurs and either observe it happening or talk to the people who *have* observed it happening and record the process steps and if possible describe exactly at what stage the problem occurs and how it happens. Talk to as many people who are involved with the process as possible to get a rounded and three dimensional view of what' happening. It may be useful to create a workflow diagram or simple process map that explains all the steps in the process and shows where the fault occurs.



The concept of physically going to the site of the problem is described as a “gemba walk”. The word “gemba” means “the actual place” in Japanese, and the concept comes from Lean Management best practices that dictate that managers who want to know what’s really happening need to get out of their plush offices, grab a safety helmet (if necessary) and go and take a walk around the shop floor where everything takes place – for example where the cars are assembled, or where the developers create the applications, and so on.

### Root Cause Analysis Step 3: Identify possible causes

- In this step you consider and document possible causes of the problem
- It is often a good idea to brainstorm root cause ideas with a group of around 5 to 9 stakeholders
- Break down the overall topic into manageable categories to focus on one aspect of the “system” at a time



If the root cause of the problem is known then this step can be omitted and instead the root cause can simply be documented and the CSM can go on to Step 4. Assuming the root cause has not yet been identified, in this step the CSM helps the customer to consider and document what the possible causes of the problem might be. What’s needed is as comprehensive a list as possible, in order to increase the likelihood of the true cause having been identified and documented within that list.

The classic approach is a brainstorming workshop with as many different people as are useful. An idea group size for brainstorming is around 5 to 9 people, since generally speaking this provides sufficient energy and creativity in terms of ideas sharing, provides sufficient different perspectives, and yet remains manageable in terms of ensuring everyone attending gets opportunities for input into the conversation and where necessary consensus opinions can be reached.

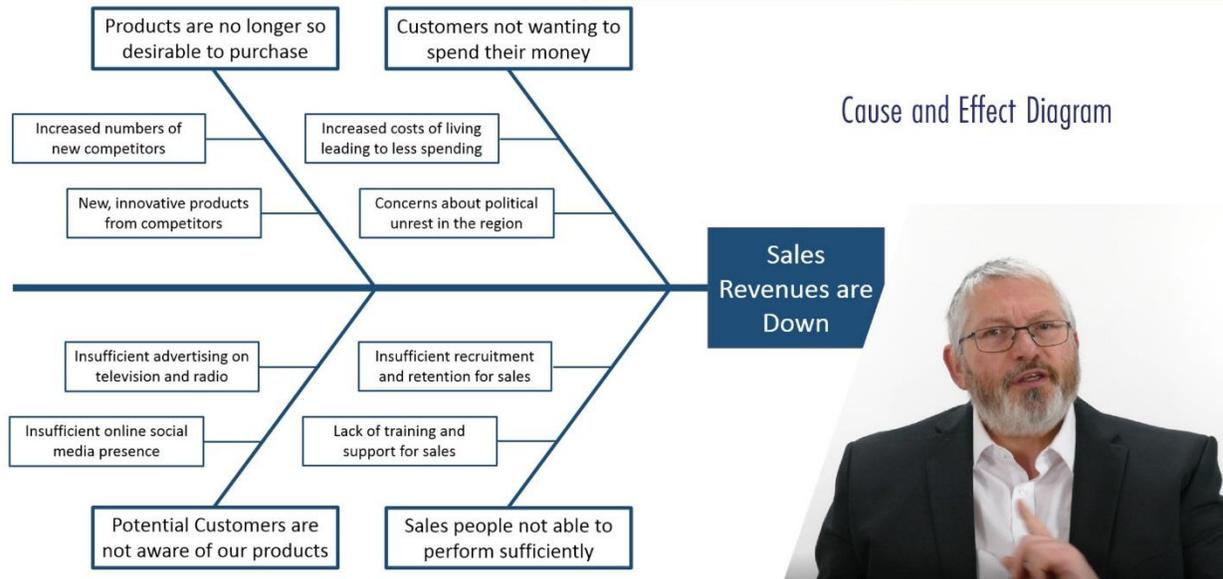
To help the group consider all possible causes, it makes sense to break down the overall topic into more manageable categories that allow workshop attendees to focus their minds on just one aspect of the “system” in which the root cause of the problem resides. For example one category to discuss and consider might be “communications”, another might be “process documentation”, another might be “service and maintenance”, and so on. If you as the CSM are not sure what categories would make sense for the particular problem the brainstorming team will be working on, get a subject matter expert (for example the process owner) to help you formulate the list of categories to use.

## Root Cause Analysis Step 3: Identify possible causes

# 5 x Why?



Another popular methodology is called “Five Whys”. The concept here is that the CSM – or indeed the brainstorming group – keep asking the question “why?” to unpeel layers of causality below which are deeper causes, until finally there are no more possible questions “why?” to ask because the root cause is reached. The idea here is not to insist upon there being five or any other specific number of layers to unpack, but simply to recognize that just because an answer has been reached it doesn’t mean that the ultimate, root cause has yet been uncovered, and to continue to explore each cause that has been identified to see if it in turn has underlying causes. When no underlying causes can be discovered then the “root” cause can be said to have been reached.



Another brainstorming tool is the “Cause and Effect Diagram”, often referred to as the “Fishbone Analysis” method, and also sometimes referred to as the “Ishikawa Analysis”. This is a best practice technique from Six Sigma that captures different effects in a way that encourages the uncovering of their causes. To perform a fishbone analysis you start by agreeing and writing down a problem statement. From this you branch out the major categories of potential causes of this problem. For each major category you then again branch out with sub categories of that category, and you sub categorise as many times as necessary until ultimately you reach actual causes.

Once all possible root causes have been discussed, identified and documented, you need the team to help you further by sorting the list of potential root causes to the problem into priority order, with the most likely cause at the top and the least likely at the bottom.

### Root Cause Analysis Step 4: Identify and implement countermeasures

- Starting with the most likely cause, identify one or more countermeasures to try out
- Prioritize the list of countermeasures and try the best one first
- Work through the list of potential solutions one-by-one
- Plan your implementation, obtain authority if necessary, assign owners and agree “completion” outcomes



In this step you will go through the list of possible causes one by one, starting with the most likely cause. For each cause, you first need to identify one or more countermeasures (ie solutions to the problem) to try out. Sometimes the solution to implement may be obvious (for example if you’ve identified that the cause of the problem is a broken part then replace that part with a new one). At other times there may be multiple possible countermeasures to try. If this is the case then as with the list of potential root causes, you need to prioritize your list of countermeasures and try the best one first. In this instance the “best” countermeasure to try might be the most likely one to work, but you may also need to consider other factors such as cost to implement, time to implement, difficulty to implement and so on. It may sometimes make sense to try a simpler countermeasure (for example one that takes just five minutes and costs nothing) first, even though another countermeasure (one that perhaps would take several days of someone’s time to implement) might be more likely to resolve the problem.

If the necessary countermeasure turns out to take a lot of time to implement (for example perhaps you need to order a spare part, or perhaps you need to get outside expertise to assist with it) then you may want to consider a stop gap or interim workaround at this stage if you have not already done so. Work through the list of potential solutions one-by-one. Unless you have a real necessity to do so, do not apply more than one countermeasure at a time, else you will not know which solution actually fixed the problem. This will make it harder to fix this or similar problems in the future if you encounter them. As with any work, make sure you plan any solution implementation, obtain any authority to proceed that might be necessary, assign owners to take on the task and provide them with a deadline for completion and agree with them what “completion” will mean. Also make sure you have identified a way to take measurements to learn if the solution has worked.

### Root Cause Analysis Step 5: Test for resolved

- Take measurements to determine if the problem has been fixed
- If the problem has not been fixed, try the next countermeasure on your list
- Check to make sure that the countermeasure has not produced any further problems to the system
- If all is good then document both the problem and the countermeasure for future reference.



Once the solution is in place, test it by taking and then analyzing these measurements to determine if the problem has been fixed. If it has not been fixed, try the next countermeasure on your list. If the problem *has* been fixed then also check to make sure that the countermeasure has not produced any further problems to the system, and if all is good then document both the problem and the countermeasure for future reference.



CSMs should be able to recognize when it is appropriate for them to take on the role of “problem solver” and when to take more of a back seat, allowing and enabling others (for example one of the customer’s own members of staff) to take control. In the latter situation the CSM should still be proactive with advice and assistance as appropriate.

## The Role of the CSM in Sales Activities

- Account managers are increasingly required either to:
  - Change their role entirely and become CSMs  
or...
  - Adopt some of the concepts and best practices from the world of customer success management into their existing sales and account management role



I was talking recently to an old friend and ex colleague of mine who works in the technology sales profession, selling SAM (software asset management) solutions to large business customers. We were discussing the rise of customer success management as a profession, and his exact words to me were:

“...I'm immersed in an industry where Account Managers seems to be morphing into Success Managers...”

I thought that this was very interesting, and highly indicative of the way that not just the existing SaaS industry but the entire software industry and indeed potentially *all* industry whether technology oriented or not is heading.

Without a doubt, account managers are being asked by their companies to turn into customer success managers, or at least to adopt some of the concepts and best practices from the world of customer success management into their existing sales and account management role.

So what precisely is the difference between an account manager and a customer success manager, and does it make sense to have just one person as AM and/or CSM rather than two people – one for each role? After all, from the perspective of the CFO (Chief Finance Officer) it costs twice as much in recruitment, training, salaries, equipment, expenses, etc) to employ both an AM and a CSM as it does to employ one person who takes on both roles.

### Example Account Manager Definition

“An account manager is a professional who manages the strategy and business relationship with their customers. After an account has been “won” by the company or agency in question, the account manager is responsible for helping the client reach their goals and ensuring a continued, positive, and profitable relationship. Account managers should understand their client’s long- and short-term needs, and leverage their company’s internal resources (strategy, customer service, creative, etc.) to help meet those goals. They serve as the client’s main point of contact, and will often provide recommendations or “upsells” to enhance their customer’s success.”

<https://www.ziprecruiter.com/e/What-Does-an-Account-Manager-Do> 22nd May 2019

If you go online and google “what does an account manager do?” or similar, you’ll likely find descriptions of the account manager’s role that sound very – almost entirely in fact – like a description of the customer success manager’s role. For example:

*An account manager is a professional who manages the strategy and business relationship with their customers. After an account has been “won” by the company or agency in question, the account manager is responsible for helping the client reach their goals and ensuring a continued, positive, and profitable relationship. Account managers should understand their client’s long- and short-term needs, and leverage their company’s internal resources (strategy, customer service, creative, etc.) to help meet those goals. They serve as the client’s main point of contact, and will often provide recommendations or “upsells” to enhance their customer’s success.*

- “...responsible for exceeding monthly/quarterly quota.”
- “...responsible for revenue growth of the portfolio.”
- “...specific targets for increasing the total payment volume with the client.”
- “...hunting and uncovering new sales leads and opportunities and managing through to successful close.”
- “...strong sales skills including business justification, negotiation and closing.”

### Actual Account Manager Role Requirements



Now this sounds just great to me, and is almost a mirror image of what I would expect a description for a customer success manager’s role to look like. But, if you look at job descriptions of real job opportunities for account managers, you tend to see a much greater focus on selling. The above are one or two examples I found.

## The Role of the CSM in Sales Activities

- There is definitely a large overlap in the role and duties of the Account Manager and Customer Success Manager
- The core difference is that AMs are remunerated on sales revenues, whereas CSMs are remunerated on adoption, product utilization and retention
- This core difference makes it difficult for one person to perform both roles well



To my mind there is a very big overlap between the roles of account manager and customer success manager, and this is potentially a difficult issue for companies, since it makes no sense to be paying two people to perform similar roles, plus of course it's potentially both confusing and even at times frustrating for customers, who tend to prefer the more straightforward approach of having a single point of contact to go to for all their needs.

On the other hand there is also a big difference between the two roles, because account managers will generally carry a revenue target either for each account separately or in total across all accounts they manage. They will be expected to spend a lot of their time hunting for new opportunities, pitching ideas and presenting sales proposals, and a substantial part of their overall remuneration package will be based on commissions and/or bonuses for hitting revenue targets – something that customers will be very well aware of.

So although there's definitely an overlap, the core difference is that the account manager generally has sales targets to meet, whereas the CSM does not, and so the AM will need to spend the majority of their time researching, discussing and presenting sales proposals, whereas the CSM will (or should) be focused on and remunerated on increasing value from existing solution purchases, giving rise to higher customer satisfaction levels and product/service adoption and utilization levels.

The problem in creating a hybrid role that straddles both hunting out new business and helping customers maximize value from existing purchases is partially one of time, but substantially one of trust. Done well, the CSM's role is already very time consuming, and it may be difficult for them to take on additional duties around presenting and negotiating new sales as well as assisting with onboarding adopting and realizing value from previous sales. But this big factor is the relationships that the CSM needs to build with internal (to the customer) key stakeholders that will enable them to perform their

role well. It's not that AMs don't also need great relationships with customer stakeholders because of course they do. But the relationship is on a different footing. The customer is perfectly aware that the account manager's job is at least partially to maximize sales opportunities with them, and they therefore adjust their expectations accordingly. The CSM on the other hand wants to be thought of as a trusted business adviser, not as a salesperson. Again I am not suggesting that it isn't possible to be both a trusted adviser *and* a salesperson, but I *am* saying that it makes it far harder to be taken seriously as a "neutral" consultant offering best practice advice if the customer knows full well that you have sales targets to meet and that you receive commissions and/or bonuses for everything you sell to them.

In summary I believe it's too much to ask to expect someone to be an expert CSM *and* a champion negotiator and closer of sales opportunities. Far better to dedicate the CSMs to non-sales related roles and remunerate them on a decent basic salary with any bonuses being overall team ones and based not on new sales but rather on targets for customer retention, product utilization and customer satisfaction. This enables CSMs to "get on" with the job of helping customers to be successful with their existing purchases far better than if they were also worrying about selling to those same customers as well.

## The Role of the CSM in Sales Activities

- There is still a role in sales for CSMs, and that role is in spotting opportunities
- The CSM may learn information about a customer's requirements that is not known to the AM
- Whilst the AM should take the lead in researching, discussing and negotiating new sales opportunities, the CSM can provide information, advice and support



However, there is still a role in sales for CSMs, and that role is in spotting opportunities. Due to the potentially quite privileged position of trust that CSMs can build up with a customer's key stakeholders over time, and the nature of some of the research, planning and implementation work around adoption and value realization that they do, the CSM may end up knowing all sorts of useful and interesting facts about the customer's organization and its' strengths, weaknesses, challenges and opportunities than even the customer's account manager might know about.

So the CSM and AM should work closely together as a team. The CSM should take the lead post-sales and the AM should take the lead pre-sales, but both should keep each other informed and up to date on what is happening within their own realms of responsibility, and both should pass previous leads and ideas for helping the customer across to each other as much as possible. The CSM who spots an opportunity to help the customer through selling them another product or service may therefore decide to pass that information across to the customer's AM to deal with, rather than attempting to deal with it themselves. By doing things this way, any potential overlaps or even clashes of interest are minimized and the decision for customer stakeholders as to which person (AM or CSM) to go to in order to discuss something should be simple to explain and clarify to them so that no confusion remains.



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