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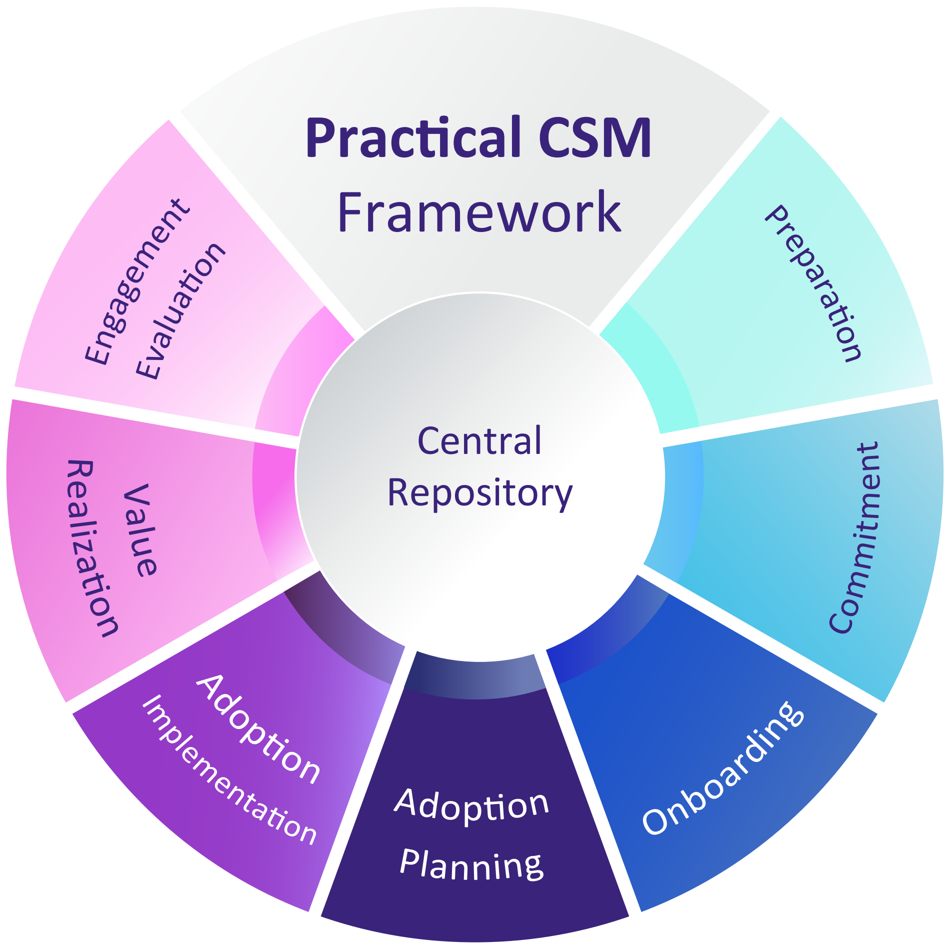
Practical CSM Framework

Practical CSM Framework Overview



What is the Practical CSM Framework?

Put in simple terms, the Practical CSM Framework is a best practice framework for customer success managers (CSMs). It provides step-by-step, best practice guidance for CSMs right from initial preparation work before meeting a new customer for the first time right through to ultimate value realization for the customer, and everything in between.

Why Use a Framework?

The principle benefits of using a framework are consistency, quality and efficiency.

- Consistency - By having all team members apply the same best practices throughout every engagement with every customer, you will ensure a consistent approach that your customers and you can rely upon
- Quality - The steps that need to be taken and the activities that need be performed within those steps are based on tried and tested best working practices that you can be sure will deliver the results that you and your customers need to see
- Productivity - Because your team will not have to constantly work out what to do or how to do it, they can get on with actually doing those things, making them far more productive as CSMs. Additionally, bringing in new team members as your team grows will also become easier, since there is a defined methodology for them to follow

Practical CSM Framework Stages

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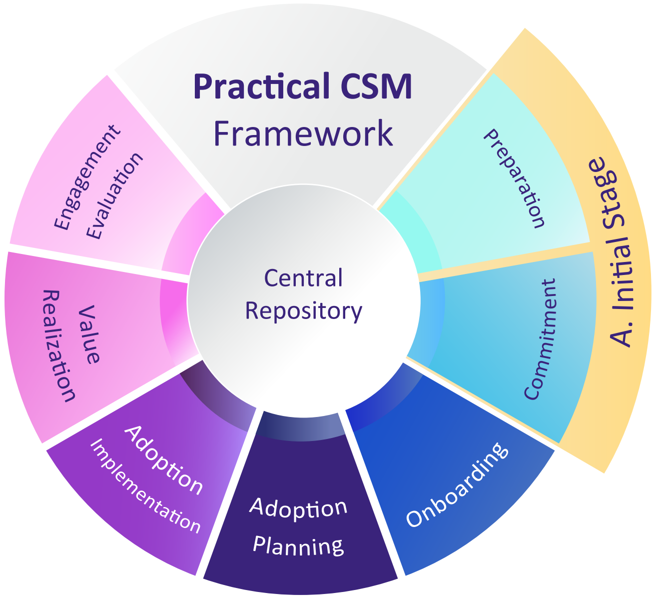
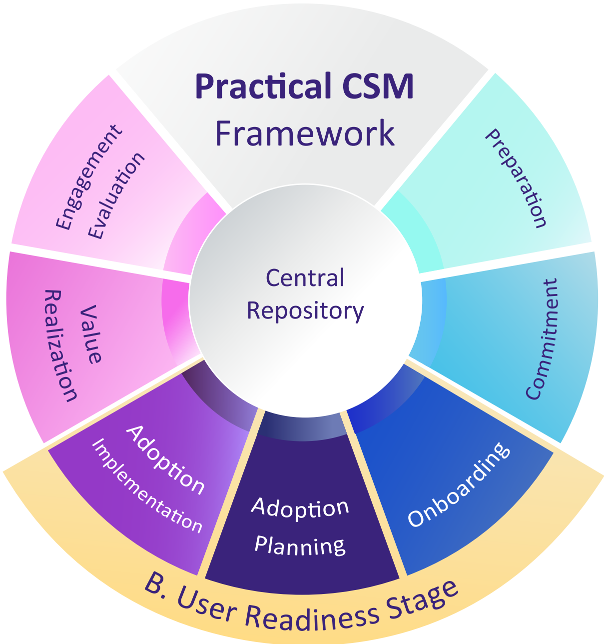
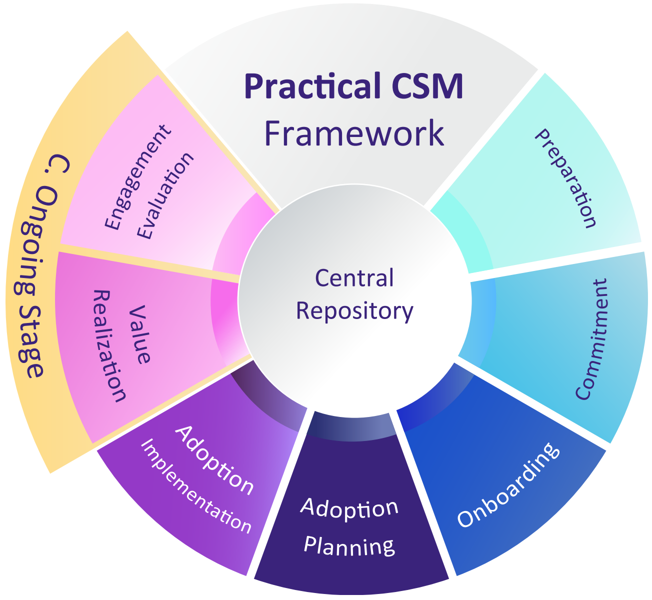
The Practical CSM Framework is divided into seven phases contained within three stages







A. Initial Stage

Phase 1: Preparation
Phase 2: Commitment

B. User Readiness Stage

Phase 3: Onboarding
Phase 4: Adoption Planning
Phase 5: Adoption Implementation

C. Ongoing Stage

Phase 6: Value Realization
Phase 7: Engagement Evaluation

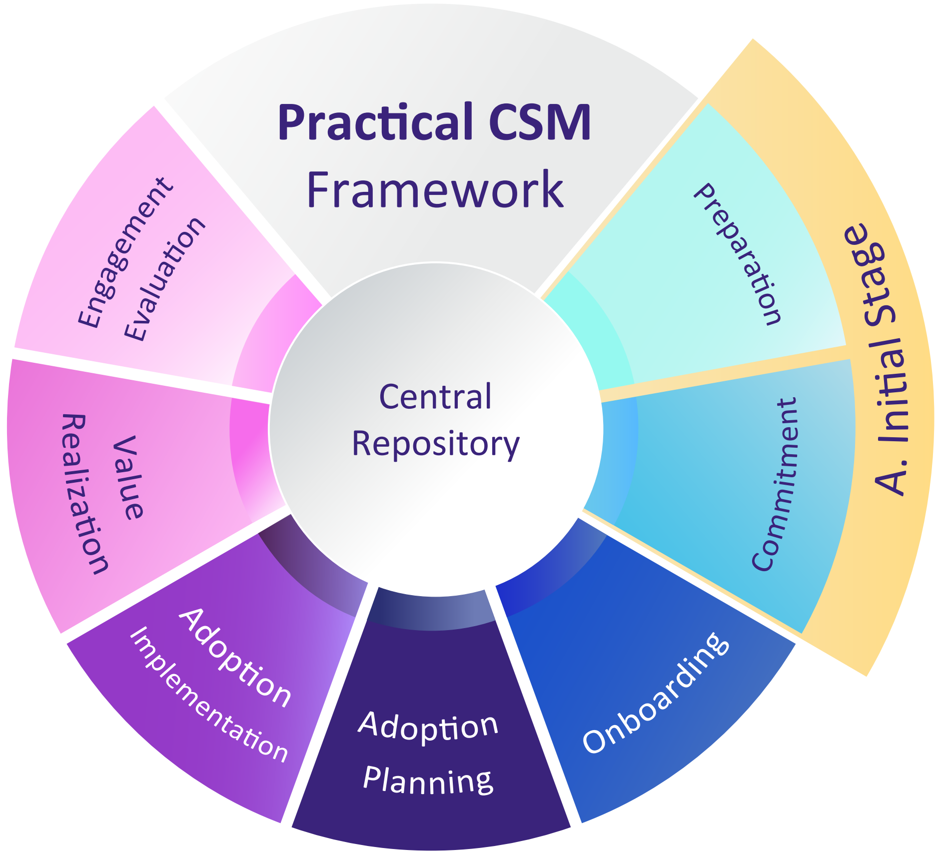
The Practical CSM Framework is divided into seven phases contained within three stages

A. Initial Stage

The early stages of an engagement are about getting things ready – primarily getting oneself ready as the CSM to be useful and relevant in the context of the customer's needs and desires and getting to know the customer's key stakeholders, as well as reaching an agreement on the types of ways the CSM will be able to help the customer with their journey towards value realization.

Phases within the Initial Stage:

Phase 1: Preparation
Phase 2: Commitment



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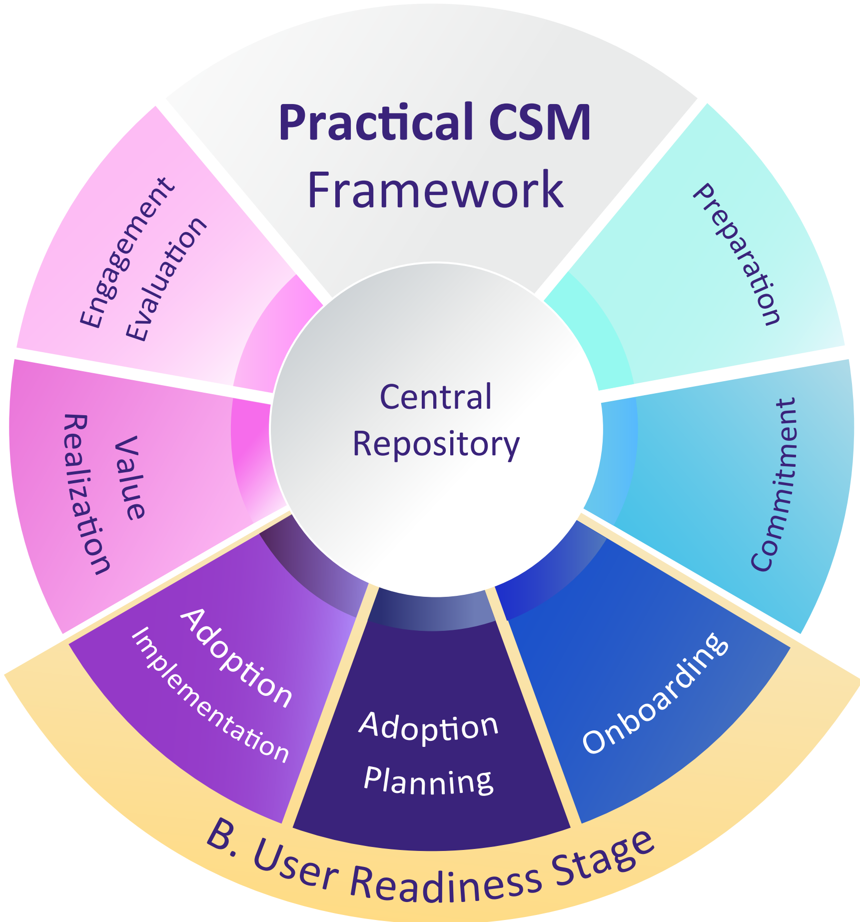
B. User Readiness Stage

The user readiness stage is all about helping the customer prepare their users to be able to fully adopt and use the solution they have purchased. This includes both the initial onboarding of products and services and then moves into full scale adoption, which in turn readies the customer to commence solution utilization.

Phases within the User Readiness Stage:

Phase 3: Onboarding
Phase 4: Adoption Planning
Phase 5: Adoption Implementation



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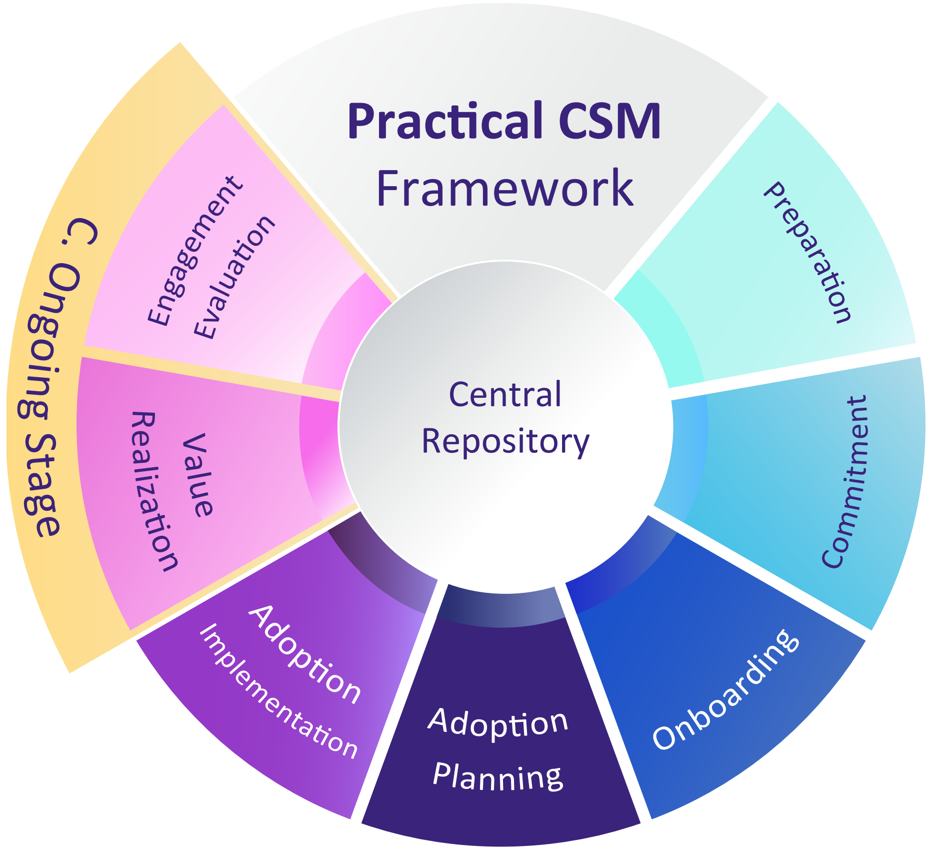
C. Ongoing Stage

The final stage is ongoing in the sense that it continues on into the future for as long as the customer continues to use the solution. This stage takes over as soon as adoption is completed and ensures that maximum value is continually generated, measured and reported on. At intervals during this stage the CSM will take stock of the engagement and determine what has gone well, what could have gone better and what has been learned for future engagements.

Phases within the Ongoing Stage:

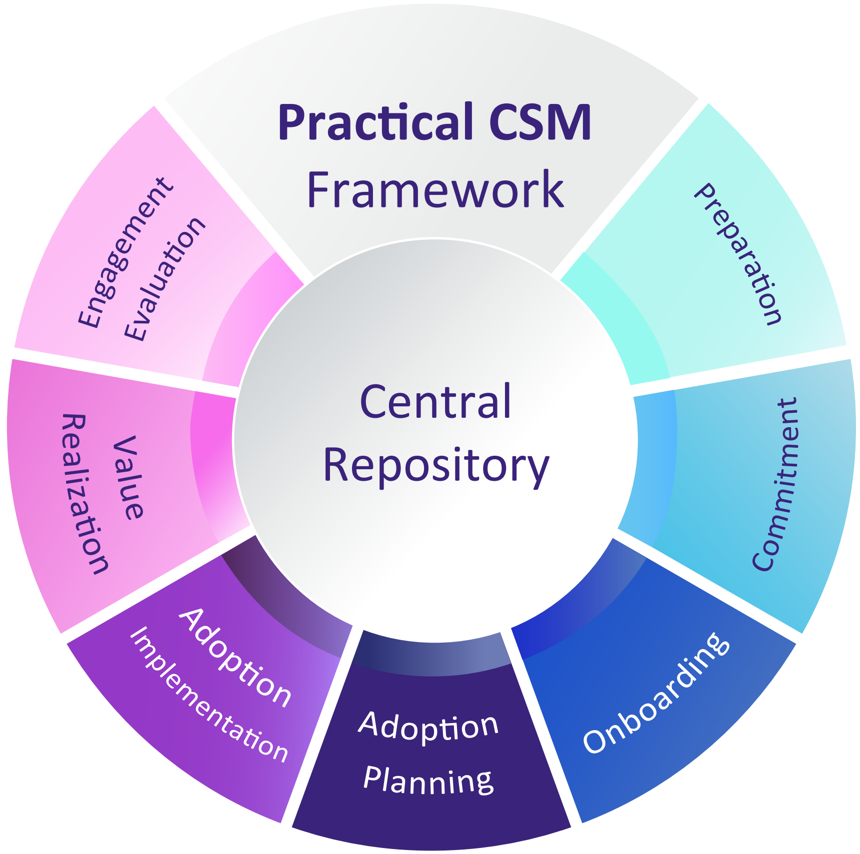
Phase 6: Value Realization
Phase 7: Engagement Evaluation



The final component of the Practical CSM Framework is the Central Repository

It's handy to have everything stored (or at least referenced) in one place so that it can be managed more easily and to make sure it is available when needed.

The concept behind the Central Repository is to ensure there is a place to store all information from each of the phases in a central location so that anyone who needs to access the information at any stage within the engagement can do so. Ultimately, new content created and stored within this Central Repository can also be templated for re-use in future engagements if this seems like a good idea.



The Practical CSM Framework and Cycles of Iteration

The Practical CSM Framework is depicted as a wheel or cycle rather than as a linear progression. This has been done deliberately in order to illustrate the concept of cyclical work, although in fact there are both linear and cyclical patterns that occur in most customer engagements. In a typical customer engagement there is a linear progression from initial meetings through to reporting on end results, as described earlier in this chapter. This is a fairly obvious progression since most things have a beginning, middle and end to them. However in addition to this progress from beginning to end it is important for CSMs to recognize that the reality of their progression is likely to be more complicated than that.

Flexible Use of the Practical CSM Framework

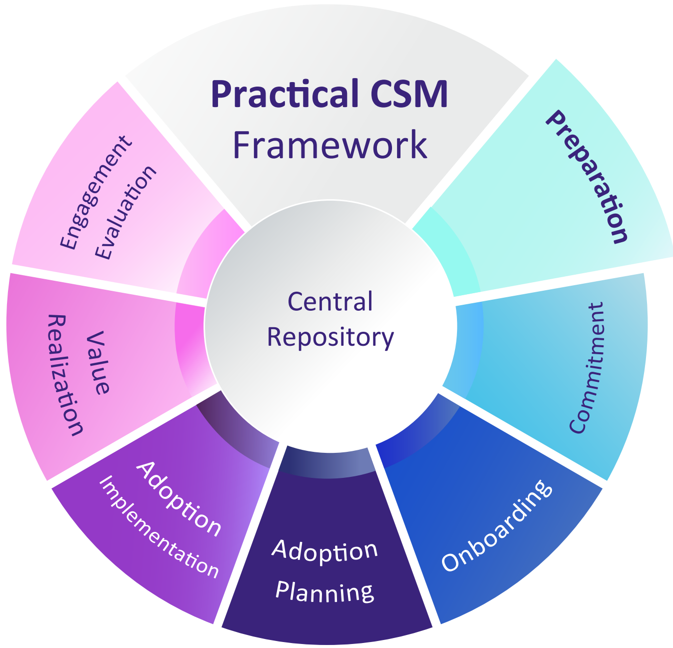
Typically the CSM will have to revisit previous phases (or even stages) and/or jump ahead to future phases/stages in order to get the job done. Sometimes this is due to outside pressures such as deadlines or budgets. At other times it's simply a product of learning on the job and uncovering new needs or requirements that need to be dealt with but which were not known about at the start. The Practical CSM Framework cycle is therefore illustrative of the need for the CSM to be flexible in their approach and willing to jump forwards and backwards through the phases as necessary whilst at all times maintaining an overall progression forwards in order to ensure the engagement's desired outcomes are attained.

Overview of Phase 1: Preparation

Before meeting the customer and indeed before performing any activity related to a new customer engagement, the CSM should engage in some basic preparation to get themselves ready for the engagement and to ensure they hit the ground running in terms of their usefulness to the customer. The preparation phase deals with what the CSM should do at this initial stage.

Activities for Phase 1: Preparation

1. Make sure you are aware of upcoming customer engagements and schedule engagement handovers for these engagements well ahead of time
2. Determine what you need to discuss ahead of the handover meeting
3. Complete the handover from colleagues
4. Perform further research on corporate systems as necessary
5. Conduct wider research on the Internet as necessary
6. Document your research in whatever tool you use to record research efforts, to the level required at this stage
7. Review the information you have documented to get a sense of the customer engagement requirements
8. Formulate the customer engagement strategy
9. Create the customer engagement strategy roadmap
10. Store all documents that have been created in a central repository



Outputs for Phase 1: Preparation

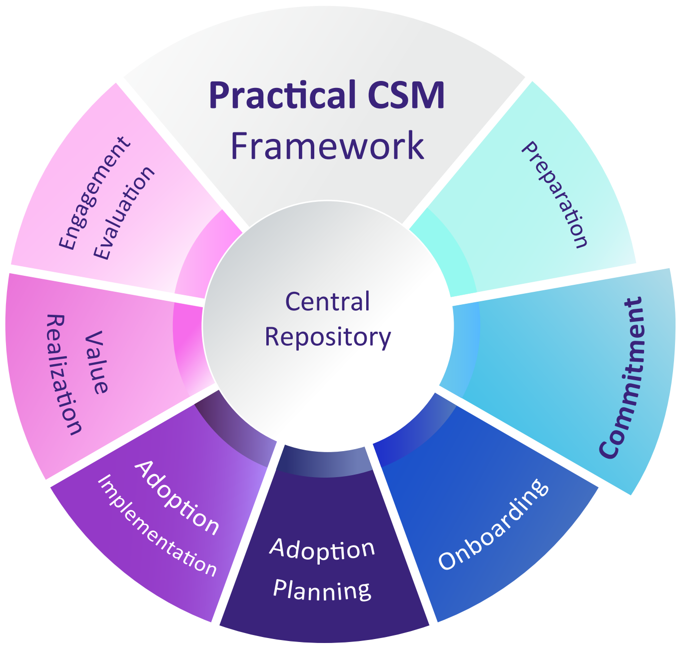
The Output for Phase 1: Preparation is the completed or partially completed engagement research information itself plus any other documents you have created. By the end of your preparations you must make sure that you have sufficient information to move forward to Phase 2: Commitment.

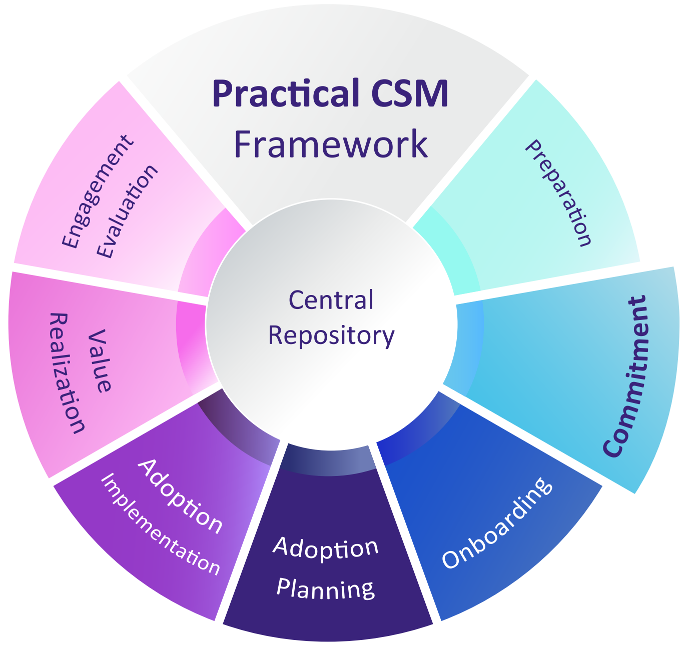
Overview of Phase 2: Commitment

It's essential that both the CSM and the customer share the same understanding both about what needs to be done in order for the customer to realize the value they need to see from the initiative and what role the CSM will play in helping that value realization to occur. It is also important for the CSM to meet key customer stakeholders and to start to develop meaningful, trust relationships with them. Additionally, it is useful for the CSM to validate some of the information that was learned during Phase 1: Preparation that was an assumption rather than a known fact, and to agree on timings for and pace of engagement to best suit the customer's needs.

Activities for PCSMF Phase 2: Commitment

1. Review the completed research documentation for this customer which you created in Phase 1: Preparation.
2. If there are any information gaps that need to be filled or assumptions that need to be validated make a note of them and prepare questions for the customer
3. Review the completed customer strategy together with any other documents that has also already been stored in the Central Repository for this customer to ensure you are up-to-date on requirements from the engagement
4. Plan the initial meeting including location, format and style, outcome requirements, agenda, duration, attendees and any collateral requirements such as presentations or case studies
5. Arrange the initial meeting and if necessary hold a pre-meeting conversation with internal colleagues such as the account manager to gain support and commitment from them to perform their part in the meeting as desired
6. If necessary practice your presentation about yourself and the role of customer success management and the types of help you can offer the customer so that you are confident and well prepared in the meeting itself





7. Try to learn as much as possible about any key customer stakeholders who will be attending the meeting but whom you have not met before so that you can focus on meeting their needs and managing the meeting successfully
8. Hold the initial meeting and present the customer's senior project lead and other customer key stakeholders with your proposed offer of help and assistance with onboarding, adoption and value creation. In the meeting negotiate the help you will provide and agree how it will be provided and the way in which you and the customer will communicate with each other
9. After the meeting update the customer strategy and customer research documentation as necessary and create the customer engagement proposal based upon the agreement made with the customer
10. Use tools such as a RACI Matrix, Stakeholder Management Matrix and Stakeholder Management Plan to begin to formulate and document a stakeholder management strategy for this customer engagement, based upon the information about key stakeholders that you have learned so far
11. Send the completed Customer Engagement Proposal to the customer's senior project lead for their validation and signature and store it together with any other documents that have been created in the Central Repository

Outputs for PCSMF Phase 2: Commitment

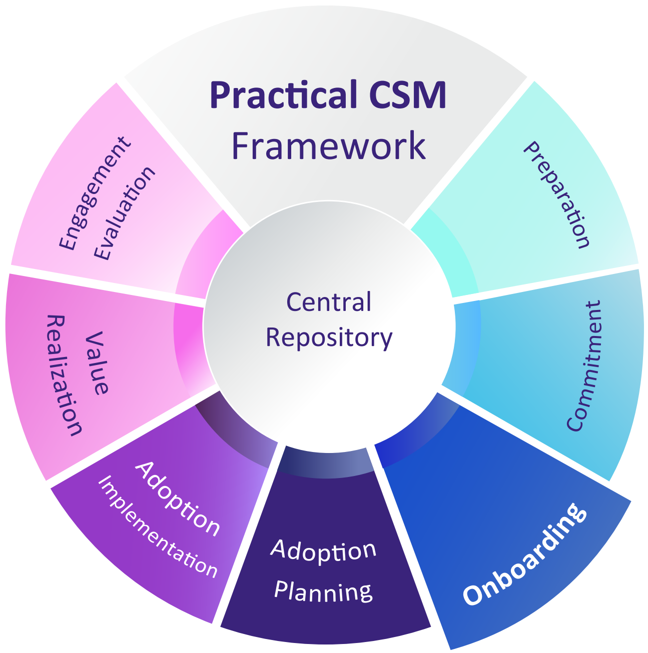
The Output for Phase 2: Commitment is the completed and signed customer engagement proposal plus updated customer research documentation and customer engagement strategy together with any RACI Matrix, Stakeholder Management Matrix and Stakeholder Management Plan (which may not yet be completed but which hopefully you can make a start on at this stage) plus any other documents you have created. By the end of your preparations you must make sure that you have sufficient information to move forward to PCSMF Phase 3: Onboarding.

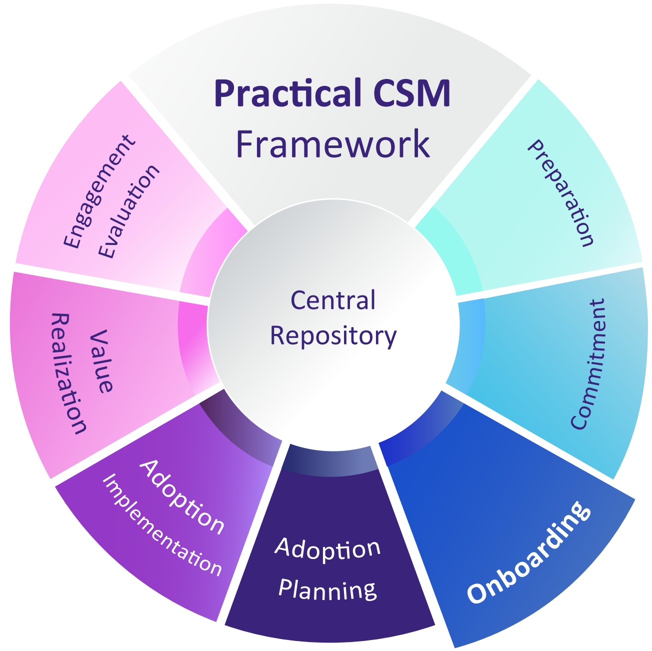
Overview of Phase 3: Onboarding

Onboarding is the process of getting the customer started with a new product, service or solution, with the idea being to help customers start attaining measurable value from their purchase as quickly as possible and to reduce customer frustration around lack of information and/or support to get them going. The Onboarding phase explains what the CSM needs to do to manage this onboarding process as effectively as possible.

Activities for PCSMF Phase 3: Onboarding

1. Review the customer documentation for this customer which you created in Phase 1: Preparation.
2. If there are any information gaps that need to be filled or assumptions that need to be validated make a note of them and prepare questions for the customer
3. Review the completed Customer Engagement Strategy together with any other documents that have also already been created in the Central Repository for this customer to ensure you are up-to-date on requirements from the engagement
4. Gain an initial understanding of the likely needs and level of complexity of the customer for onboarding.
5. Hold an initial conversation with the customer to discuss their onboarding needs and explain the options available to them
6. Follow up as necessary to learn more information and to negotiate an agreement as to the scope and level of help you will be providing for customer onboarding together with other relevant information such as start times and important deadlines, communication and reporting and any professional services fees





7. Complete a detailed onboarding requirements capture for the customer and analyze this information to determine a phased onboarding project plan
8. Document the onboarding project plan and share the plan with colleagues and customer as necessary. The plan should include phases, milestones, activities and responsibilities as well as outputs and outcomes for each phase.
9. Work the plan! Make adjustments as necessary along the way due to changes in customer needs or additional information uncovered in these later stages that provide you with additional insight into customer onboarding requirements. Liaise with colleagues and customer regularly during this time to ensure activities are being completed and outputs and outcomes are being attained.
10. Record and manage your own time and to learn lessons for future similar engagements
11. Create customer facing reports at each major milestone and at the end of the onboarding process.

Outputs for PCSMF Phase 3: Onboarding

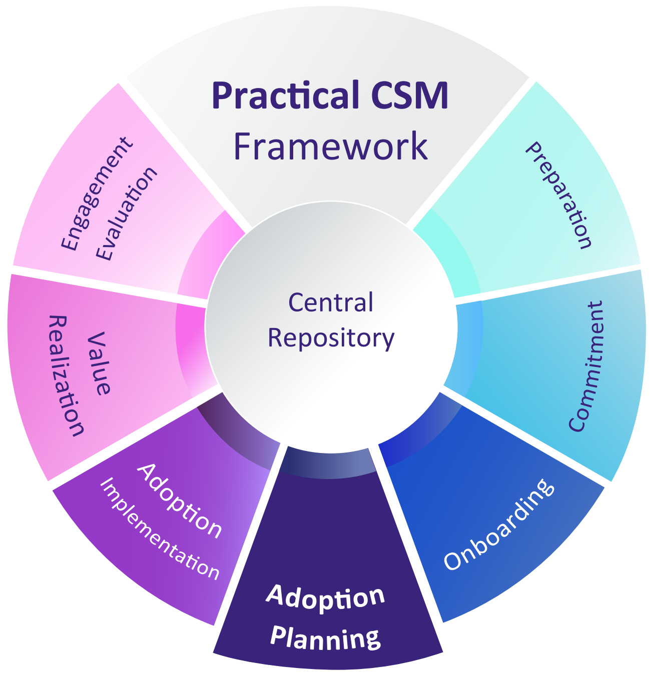
The Output for Phase 3: Commitment is the successful completion of all onboarding activities, which should be signed off by the customer and detailed in the documentation you have created, together with lessons learned. By the end of the onboarding phase you will be ready to move forward to PCSMF Phase 4: Adoption Planning.

Overview of Phase 4: Adoption Planning

This is the process of researching and analyzing customer information relating to who will be using the solution and how they will be using it. This phase explains how to create a high level adoption roadmap for sign-off from senior sponsors and a detailed adoption project plan to be followed during the Adoption Implementation phase.

Activities for PCSMF Phase 4: Adoption Planning

1. Review the research documentation for this customer which you created in Phase 1: Preparation.
2. If there are any information gaps that need to be filled or assumptions that need to be validated make a note of them and prepare questions for the customer
3. Review the completed Customer Engagement Strategy together with any other documents that have also already been created in the Central Repository for this customer to ensure you are up-to-date on requirements from the engagement
4. Gain an initial understanding of the needs and level of complexity of the customer for adoption
5. Hold a series of meetings with the customer to discuss and document their adoption needs and determine their adoption requirements
6. Follow up as necessary to learn and document additional information where any information gaps were uncovered
7. Document each process that will be impacted by the initiative and describe the changes
8. Use the information gained in Step 7 to determine which users will be impacted and then group them into IGs (impacted groups). Document each group and their KSA (knowledge, skills and attitude) change requirements
9. Capture all practical considerations that need to be regarded during the adoption planning process



10. Work through the communication, training and support needs for each IG and document these needs
11. Capture and document potential adoption barriers that need to be regarded during the adoption planning process
12. Capture and document potential risks that need to be regarded during the adoption planning process
13. Now work with customer's senior project lead and other customer stakeholders as necessary to create an outline adoption plan. Use the information you have previously research and documented to help you as necessary. Create and document the outline adoption plan
14. Create an adoption proposal and gain acceptance and approval for your adoption plan. This may necessitate amendments which you should document in the outline adoption plan as necessary.
15. Once the outline adoption plan has been approved, proceed to help the customer to flesh out the adoption plan into a fully detailed version, using project management tools to do so if necessary. This may involve multiple stakeholders from HR and Training departments, change management professionals, and team leaders and process owners as necessary.
16. Create a summarized version of the full adoption plan that can be published more widely as an adoption roadmap for all workers (or at least for managers) to see, and start work on any other marketing collateral needed for marketing the upcoming adoption program.
17. Document a summary of the work you have accomplished plus any lessons you have learned in the Central Repository for future reference.

Outputs for PCSMF Phase 4: Adoption Planning

The main Output for Phase 4: Adoption Planning is a fully detailed adoption plan. If possible, the CSM should store a copy of this document together with other documents created during this phase in the Central Repository, together with lessons learned. By the end of this adoption planning phase you and the customer will be ready to move forward to PCSMF Phase 5: Adoption Implementation.

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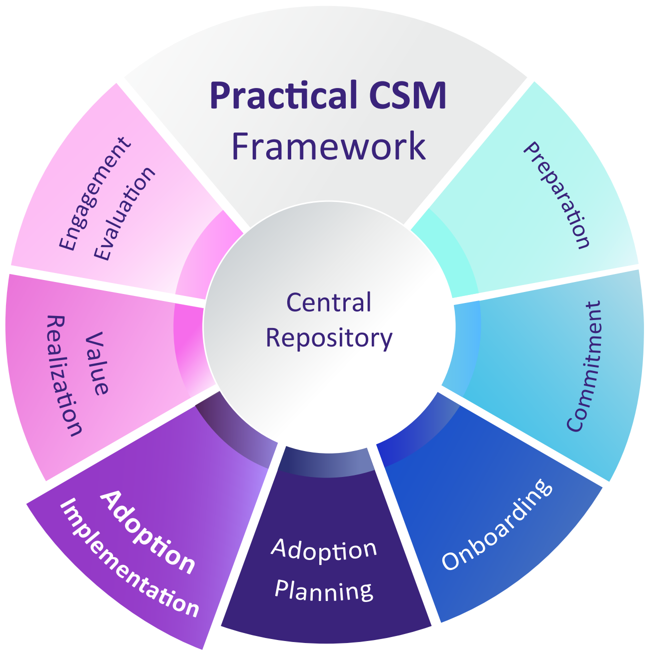
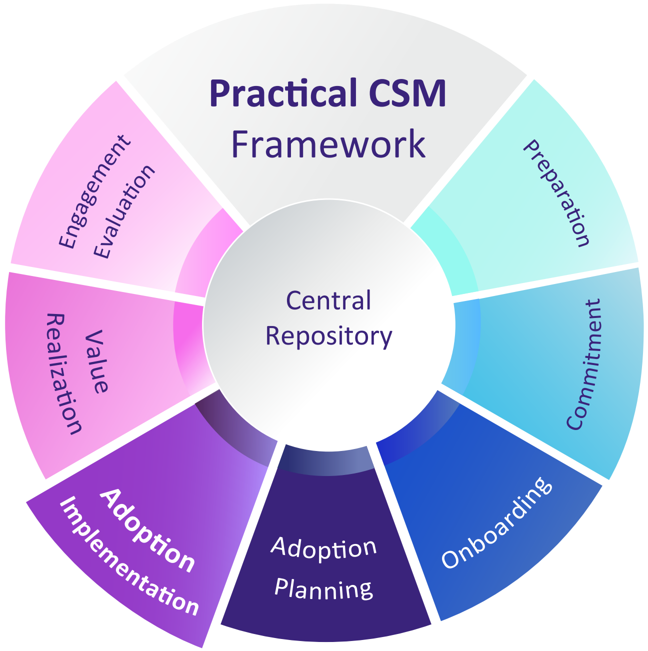
Overview of Phase 5: Adoption Implementation

The Adoption Implementation phase explains the role of the CSM in helping the customer to carry out the planned adoption in a smooth and orderly fashion.

Activities for PCSMF Phase 5: Adoption Implementation

1. Review the research documentation for this customer which you created in Phase 1: Preparation.
2. If there are any information gaps that need to be filled or assumptions that need to be validated make a note of them and prepare questions for the customer
3. Review the completed Customer Engagement Strategy together with any other documents that have also already been created in the Central Repository for this customer to ensure you are up-to-date on requirements from the engagement
4. Take some time with the customer's senior project lead and other key stakeholders to review the adoption plan, adoption roadmap and any other documentation that was created by the customer to project manage the adoption program with
5. If necessary break the project phases down into smaller, work packages that can be assigned to individuals to complete and which each have their own deliverables.
6. Create an Adoption Program Readiness Checklist and then work through the list in a project readiness workshop. Attend to any issues that are uncovered by this process.
7. Commence the adoption program. Allocate time in your schedule to support, advise, counsel and otherwise assist the customer's senior project lead or whoever is formally project managing the adoption program. Pay special attention to managing people and to ensuring that tasks are completed and measurements are taken.





8. Collate and documents measurements and compile reports (or make sure that those who are responsible for performing those tasks are doing so)
9. Respond to unexpected challenges that turn up, and make sure to document these challenges for reference in the planning for future similar adoption programs with other customers.
10. Attend governance committee meetings or other management meetings as necessary to report on progress and to help determine any changes to the adoption program if any are necessary.

Outputs for PCSMF Phase 5: Adoption Implementation

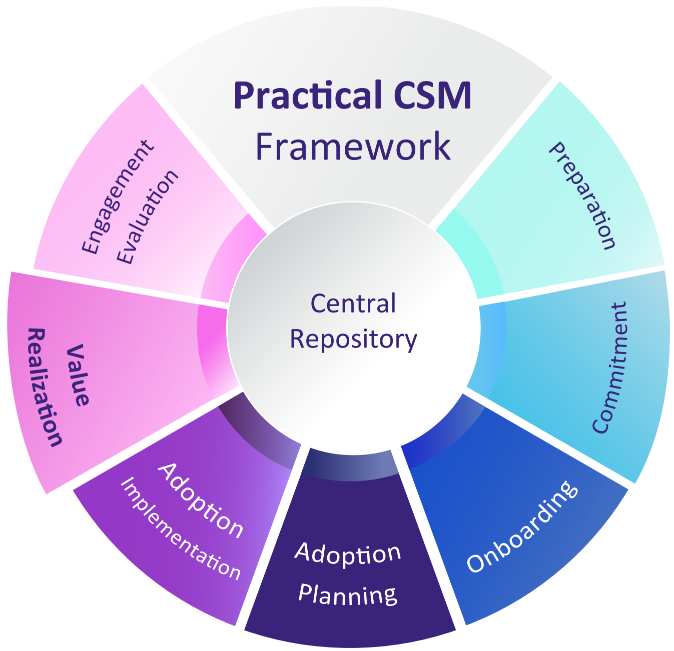
The main Output for Phase 5: Adoption Implementation is the completion of the adoption program – or at least the initial or formal part of it (see discussions above about whether an adoption program can be said to ever fully reach a completion).
The CSM should store a copy of any documentation created during this phase in the Central Repository, together with lessons learned. By the end of this adoption planning phase you and the customer will be ready to move forward to PCSMF Phase 6: Value Creation.

Overview of Phase 6: Value Realization

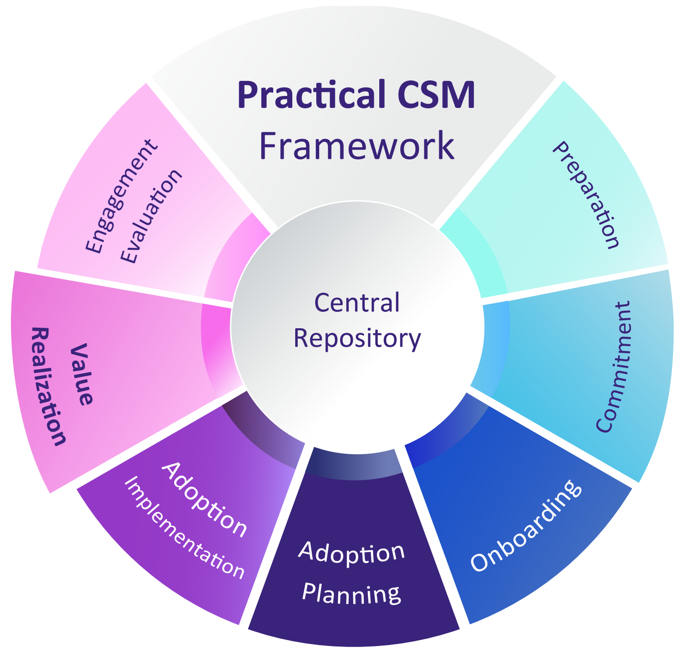
The Value Realization phase takes over directly after adoption has been completed. Once users are using the new functionality they have been provided with, the value being created needs to be measured and tracked and adjustments may need to be made from time to time to ensure progress towards outcomes continues to be made.

Activities for Practical CSM Framework Phase 6: Value Realization

1. Review your company's customer success software system and in particular the health score system to determine the health of all customer relationships and to understand which customers require help and assistance
2. For each customer that you identify as requiring your assistance, determine how much of your time to allocate to that customer's needs and perform the steps outlined below as necessary based on relevance to that company's needs:
3. Review the research for this which you created in Phase 1: Preparation.
4. If there are any information gaps that need to be filled or assumptions that need to be validated make a note of them and prepare questions for the customer
5. Review the completed Customer Engagement Strategy together with any other documents that have also already been created in the Central Repository for this customer to ensure you are up-to-date on requirements from the engagement
6. Assist customers towards realizing their value by ensuring that KPIs and milestones have been carefully thought through and identified, that measurements are being taken and that progress is being monitored and reported and (where necessary) corrective action taken to get the initiative back on track



7. Identify any challenges and/or changes that occur and to plan for taking actions to deal with each one
8. Make every effort to ensure that customers perceive the value of the existing products, services and/or solutions that they have purchased in order to maximize the likelihood of them renewing their contracts and renewing at the highest possible level
9. Keep an eye open for upselling and crosselling opportunities and when such an opportunity is spotted deal with it quickly following your company's policy and process for doing so
10. Attend regular meetings with the customer to report on and discuss progress and to acknowledge and plan for any new challenges or changes that have been identified
11. Take every reasonable opportunity to ask for and obtain feedback and advocacy from the customer
12. Use a checklist to check to ensure that all activity that should have taken place has indeed occurred and if not, formulate a plan to ensure it happens now
13. Update the corporate customer success management software system to ensure that all information pertaining to each customer is accurate and up-to-date



Outputs for Practical CSM Framework Phase 6: Value Realization

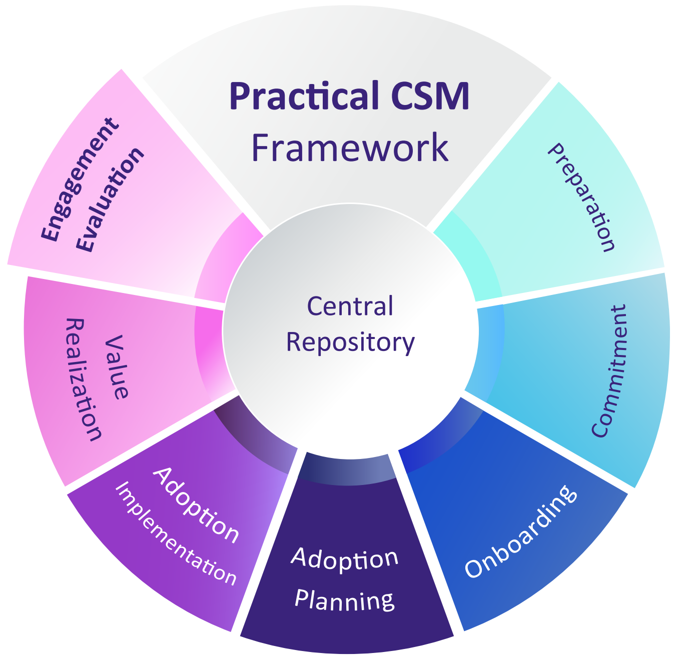
The outputs for Phase 6: Value Realization include updated information that is documented on the corporate customer success management software system together with any completed changes and challenges checklists and/or value realization activity checklists. The CSM should store a copy of any documentation created during this phase in the Central Repository, together with lessons learned. By the end of this adoption planning phase you and the customer will be ready to move forward to PCSMF Phase 7: Engagement Evaluation.

Overview of Phase 7: Engagement Evaluation

Every time a CSM engages with a customer the CSM gains in experience. This experience together with any resources that were created for the customer that could be templated and re-used in future customer engagements need to be evaluated and recorded. Lessons can be learned from every engagement to help become better CSMs in the future.

Activities for Practical CSM Framework Phase 7: Engagement Evaluation

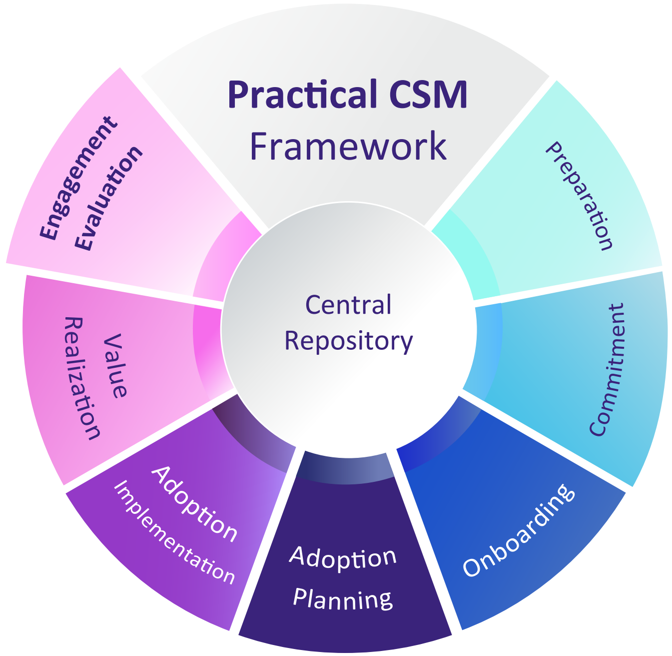
1. Review the work you have completed for a customer engagement on a regular basis to determine lessons learned both for self and team
2. Capture any best practice processes, tools and templates that you have developed for this customer engagement and save them in a format that makes them accessible for either yourself or the customer success team as a whole as appropriate
3. Determine any mistakes made or lessons learned about how things could be done better in future similar engagements and plan how this can be achieved
4. Develop your own vision for your personal career success, determine the CSFs for attaining this vision and then design and plan activities for achieving those CSFs and work the plan to do so
5. Meet on a regular basis (for example quarterly) to formally review progress made in the previous period and determine activities and targets for the upcoming period. This can be done with your team manager where possible but otherwise select a colleague or peer to work with
6. Contribute as appropriate not just to the content within your customer success team's central repository but to the management and maintenance of it



7. Act as a team player by helping team members when opportunities arise to do so, and do not be afraid of reaching out to fellow team members for their assistance when you need it
8. Celebrate your own and your team's successes as often as you have the opportunity to do so

Outputs for Practical CSM Framework Phase 7: Engagement Evaluation Outputs for Practical CSM Framework Phase 7: Engagement Evaluation

The main Output for Phase 7: Engagement Evaluation is a better you. This is achieved through learning the lessons of the experiences you encounter as you engage with each customer and help them on their journeys towards value realization. In addition to this, the best practice processes, tools and templates that you and your team members have available to them will be improved as your body of knowledge and experience matures and evolves



Customizing the Practical CSM Framework

The Practical CSM Framework can be customized to meet your company's CS strategy, its products and services, and the needs of your customers. Feel free to use our generic framework as a start point for creating your own framework, making whatever changes and adjustments you need to tailor it to meet your own unique requirements.

Want to Learn More?

If you're interested to learn more about the Practical CSM Framework and how to use it to generate value for your customers and your own company, visit our website at www.practicalcsm.com to learn about our book *Practical Customer Success Management* and our CCSMP (Certified CSM Professional) training program.

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