CSM Call Playbook: Call Types, Scripts, and Best Practices

This playbook provides detailed guidance for Customer Success Managers (CSMs) handling different types of customer calls. It includes best practices, fictional scenarios, conversation scripts, and key questions to maximize customer engagement, drive product adoption, and secure renewals.

1. Goals Discovery Call

- **Purpose:** Understand the customer's business objectives, map stakeholders, and define success metrics.

- **Key Questions for Goals Discovery:**

- ☑ What are your top three business priorities for the next 6-12 months?

- ☑ What success metrics will determine if our product is delivering value?

- ☑ Who will be using the platform daily, and what are their main goals?

- ☑ Are there any executive sponsors or decision-makers we should be aligned with?

- ☑ How does your team define ROI for tools like ours?

- **Stakeholder Mapping:**

- ☑ Who is the champion (daily user advocating for the product)?

- ☑ Who is the economic buyer (decision-maker for renewal and expansion)?

- ☑ Who influences product adoption internally?

- **Fictional Scenario & Sample Script:**

- *Customer Profile: SaaS company adopting a CRM tool. The CSM speaks to the Head of Sales Operations.*

- **CSM:** 'Thanks for taking the time today! I want to make sure we're aligned on your business goals so we can tailor the experience to your needs. Can you tell me a bit about your team's current sales workflow and what improvements you're looking for?'

- **Customer:** 'We need better visibility into our pipeline. Right now, data is scattered across multiple spreadsheets, and forecasting is unreliable.'

- **CSM:** 'That makes sense! We work with many sales ops leaders who had the same issue before implementing our CRM. When you think about a successful implementation, what specific KPIs would indicate that this problem has been solved?'

- **Customer:** 'If we could increase forecast accuracy by at least 20% and reduce manual data entry, that would be a win.'

- **CSM:** 'Got it. I'll make sure we focus on those areas. Who else in your organization will be involved in evaluating this success—any executives or additional teams?'

- **Customer:** 'Our VP of Sales is interested in adoption metrics, and our RevOps team will handle data cleanup.'

- **CSM:** 'Perfect! I'll ensure we include those success metrics in our roadmap and schedule check-ins with your team to track progress.'

2. Handover Call from Onboarding Specialist to CSM

- **Purpose:** Ensure a smooth transition from onboarding to ongoing customer success management.

- **Key Questions for Handover:**

- ☑ What has been accomplished in the onboarding phase so far?

- ☑ Are there any outstanding training sessions or technical setup needs?

- ☑ What are the customer's top goals for using the platform?

- ☑ How confident is the team in using the product independently?

- **Fictional Scenario & Sample Script:**

- *Customer Profile: Mid-sized company that has completed onboarding and is transitioning to CSM management.*

- **Onboarding Specialist:** 'I want to introduce you to [CSM Name], who will be your main point of contact moving forward. We've completed training sessions on reporting and workflows, but some teams still need a deeper dive into automation features.'

- **CSM:** 'Thanks, [Onboarding Specialist]! Hi [Customer Name], I'm excited to continue working with you. Based on what I've heard, it sounds like most of the implementation has gone smoothly, and now we're focused on driving adoption. Are there any remaining areas where you feel your team needs more guidance?'

- **Customer:** 'Yes, we need more help with automation. We understand the basics but haven't set up custom workflows yet.'

- **CSM:** 'That's great to hear. Let's set up a working session next week to ensure automation aligns with your team's daily processes.'

3. Strategy & Adoption Call

- **Purpose:** Deepen feature adoption by showing how it aligns with business processes.

- **Key Questions for Driving Adoption:**

- ☑ How is your team currently using [Feature]?

- ☑ Have you explored [Feature]? It can help automate [specific task].

- ☑ What's the biggest time-consuming workflow that we can help streamline?

- **Fictional Scenario & Sample Script**:**

- *Customer Profile: Marketing team using analytics dashboards but not utilizing automation tools.*

- **CSM:** 'I noticed your team has been actively using the reporting features, but automation tools haven't been utilized yet. Most teams see significant efficiency gains when setting up automated workflows. Is reducing manual tasks a priority for you?'

- **Customer:** 'Yes, we're spending too much time generating manual reports.'

- **CSM:** 'That makes sense! If we set up automated campaign tracking, it could save your team 5+ hours per week. Would you like me to walk you through how other teams use it successfully?'

4. Renewal & Negotiation Call

- **Purpose:** Secure a long-term renewal while discussing multi-year commitments.

- **Key Questions for Renewals:**

- ☑ How has our product impacted your team's efficiency over the past year?

- ☑ What areas would you like to improve or optimize before renewing?

- ☑ Would locking in pricing with a multi-year contract provide financial benefits?

- **Fictional Scenario & Sample Script**:**

- *Customer Profile: A customer with a 1-year contract is up for renewal, and the CSM wants to secure a multi-year agreement.*

- **CSM:** 'As your renewal date approaches, I wanted to check in on your experience. Your team has seen great results with [Product Feature], and many customers in your position choose a longer-term plan to lock in current pricing and maximize value. Would you be open to exploring a multi-year agreement?'

- **Customer:** 'We were thinking of just renewing for a year like last time.'

- **CSM:** 'That's certainly an option. However, given your projected growth, a multi-year agreement would provide cost savings and budget predictability. If we could offer you a pricing incentive for a 2-year term, would that be worth considering?'

- **Customer:** 'Possibly, but we're still reviewing budgets.'

- **CSM:** 'Understood. Would it be helpful if I provided a cost breakdown of a multi-year plan versus an annual renewal? That way, you can see the long-term benefits before finalizing the decision.'

5. Save Call (Churn Risk Customer)

- **Purpose:** Understand why the customer is considering leaving and address their concerns.

- **Key Questions for Churn Risk Customers:**

- ☑ What motivated your team to consider switching providers?

- ☑ Are there specific pain points that have caused frustration?

- ☑ Have you factored in the cost of switching, including retraining your team?

- ☑ If we could address [specific concern], would you be open to staying with us?

- **Fictional Scenario & Sample Script:**

- *Customer Profile: A long-term customer is considering moving to a competitor due to pricing and feature concerns.*

- **CSM:** 'I understand you're exploring other options. Can you share what's driving this decision?'

- **Customer:** 'Pricing and feature set—Competitor X is offering a lower price.'

- **CSM:** 'I completely understand that pricing is a key factor. However, have you considered the cost of switching? Retraining your team, migrating data, and adjusting workflows can often take months. Would it help if we reviewed a cost-benefit analysis comparing both solutions?'

- **Customer:** 'We have looked at that, but we're still not sure.'

- **CSM:** 'I'd love to go deeper into this and ensure we're aligned on your needs. Can you tell me if there's a specific feature gap that is making you consider leaving? If we could bridge that gap with an upcoming release or an alternative solution, would you be willing to reconsider?'

6. Escalation Call

- **Purpose:** Get to the root cause of the issue, define a satisfactory resolution, and set clear expectations.

- **Key Questions for Escalation Calls:**

- ☑ Can you describe the exact issue and how it is impacting your team's workflow?

- ☑ What would be an acceptable resolution for you to move forward?

- ☑ Are there any immediate workarounds that could help in the meantime?

- ☑ Would you like regular updates on progress, even if there's no immediate resolution?

- **Fictional Scenario & Sample Script:**

- *Customer Profile: An enterprise client experiencing a product outage affecting their operations.*

- **CSM:** 'I appreciate you bringing this to our attention. I want to ensure we fully understand the impact on your team. Can you describe exactly how this issue is affecting your daily operations?'

- **Customer:** 'It's causing major delays, and we need an immediate fix.'

- **CSM:** 'I completely understand the urgency. Our engineering team is actively working on it, and I will be your main point of contact. To manage expectations, what would be a satisfactory resolution for you at this point?'

- **Customer:** 'We need this fixed ASAP, but we also need better communication on what's happening.'

- **CSM:** 'That makes sense. I will provide updates every 24 hours, even if there's no major progress, so you're always informed. Would that help alleviate some uncertainty?'

- **Customer:** 'Yes, that would be helpful.'

- **CSM:** 'I'll make sure that happens. I'll follow up with an update by [time].'