CSM Meeting Preparation Checklist

This checklist helps Customer Success Managers (CSMs) prepare effectively for internal meetings, ensuring they contribute valuable insights, drive action, and align with cross-functional teams. Following this structured approach will improve efficiency and impact in every meeting.

General Meeting Preparation

- ☑ Review meeting agenda and objectives in advance.
- ☑ Identify key discussion points you want to bring up.
- ☑ Gather relevant customer data (health scores, renewals, escalations).
- ☑ Prepare structured feedback based on data and real customer examples.
- ☑ Set clear goals for what you want to achieve in the meeting.

Weekly CS Team Meeting

- ☑ Bring at least one customer success win to share.
- ☑ Identify a common challenge customers are facing.
- ☑ Be prepared to discuss new initiatives and performance metrics.
- ☑ Align on any process improvements needed for customer engagement.

One-on-One with Manager

- ☑ Prepare updates on high-priority accounts (renewals, risks, expansions).
- ☑ Identify areas where you need leadership support (escalations, processes).
- ☑ Share recent successes and key learnings.
- ☑ Discuss career growth goals and feedback.

CS & Sales Sync (Expansion & Renewals)

- ☑ Identify 2-3 priority accounts with upsell or renewal potential.
- ☑ Review customer objections and how to address them collaboratively.
- ☑ Align on account ownership and responsibilities.
- ☑ Discuss expansion opportunities based on customer growth signals.

Company-Wide Meeting

- ☑ Take notes on company goals, leadership updates, and upcoming changes.
- ☑ Identify how strategic changes impact customer success.

- ☑ Prepare questions if leadership opens Q&A opportunities.

Product Update Meeting

- ☑ Review upcoming product releases and roadmap changes.
- ☑ Bring customer feedback that highlights feature gaps or areas for improvement.
- ☑ Prepare questions about how new features impact customer adoption.
- ☑ Align on how to communicate product changes to customers.

Best Practices for Contributing to Meetings

- ☑ Stay focused on the agenda—avoid off-topic discussions.
- ☑ Use data to support your points and drive meaningful conversations.
- ☑ Be proactive in offering solutions, not just raising problems.
- ☑ Follow up with clear action items after the meeting.

📩 Follow-Up Email Template

- Subject: Follow-Up & Action Items from [Meeting Name]
- Hi Team,
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- Here’s a quick recap of our discussion:
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- **Key Takeaways:**
- - [Summary of discussion points]
- - [Customer challenges addressed]
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- **Action Items:**
- [Task 1] – Owner: [Name] – Due: [Date]
- [Task 2] – Owner: [Name] – Due: [Date]
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- Let me know if I missed anything. Looking forward to our next update!
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- Best,
- [Your Name]