

CSM 1:1 Meeting Preparation Framework

This framework helps Customer Success Managers (CSMs) prepare for their 1:1 meetings with their direct manager. A well-structured 1:1 ensures that performance progress is tracked, challenges are addressed, and career growth goals are set strategically.

Structuring Your 1:1 Meeting

- Set a clear ****agenda**** before each 1:1.
- Document key updates on customer accounts.
- Identify areas where you need support.
- Align on career growth goals and next steps.
- Keep track of decisions and action items for follow-up.

Section 1: Performance & Customer Account Updates

- What key wins have you achieved since the last 1:1?
- Are there any accounts at risk that need leadership support?
- What is your progress toward renewal, upsell, and retention goals?
- Any customer feedback that should be shared with leadership?

Section 2: Challenges & Areas Where You Need Help

- What are the biggest roadblocks you're facing?
- Are there any internal processes slowing you down?
- Do you need help with an escalation, negotiation, or account strategy?
- What resources or coaching would help you improve?

Section 3: Career Progression & SMART Goal Setting

- What long-term career goals do you want to discuss?
- What skills do you want to develop further?
- Are there stretch projects or leadership opportunities you're interested in?
- What mentorship, training, or support do you need to progress?

Section 4: Key Takeaways & Action Items

- Summarize key decisions made during the 1:1.
- Document next steps for both you and your manager.

- Schedule follow-ups on any pending issues.
- Track your progress in a shared document for future meetings.

1:1 Meeting Summary Email Template

- Subject: Follow-Up & Action Items from 1:1 Meeting
- Hi [Manager's Name],
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- Here's a summary of our discussion:
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- ****Performance & Account Updates:****
- - [Summary of customer wins, challenges, renewals]
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- ****Areas Where I Need Support:****
- - [Challenges discussed and help required]
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- ****Career Progression & SMART Goals:****
- - [Long-term career aspirations and action plan]
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- ****Action Items:****
- [Task 1] – Owner: [Your Name/Manager] – Due: [Date]
- [Task 2] – Owner: [Your Name/Manager] – Due: [Date]
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- Looking forward to our next check-in!
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- Best,
- [Your Name]