

## **Playbook: Core Responsibilities Reflection Checklist**

This reflection checklist allows you to evaluate your alignment with the core responsibilities of a Customer Success Manager (CSM). Use it to identify areas where you excel and areas for improvement.

### **1. Acting as the Primary Advocate for the Customer**

- ☐ Do I regularly gather and document customer feedback?
- ☐ Have I successfully communicated customer needs to internal teams?
- ☐ Do I balance customer advocacy with company priorities?

### **2. Driving Customer Adoption and Success**

- ☐ Do I proactively analyze customer usage metrics?
- ☐ Have I identified underutilized features and provided targeted training?
- ☐ Do I ensure every customer has a clear adoption plan?

### **3. Proactively Identifying Opportunities for Upsells and Renewals**

- ☐ Do I regularly listen for expansion cues during customer calls?
- ☐ Have I worked with Sales to propose upsell opportunities aligned with customer needs?
- ☐ Do I prepare customers for renewal discussions in advance?

### **4. Managing and Mitigating Churn Risks**

- ☐ Do I recognize early churn signals (e.g., lack of engagement, dissatisfaction)?
- ☐ Have I successfully handled escalations to restore trust?
- ☐ Do I create and execute churn mitigation plans?