

PROMPT ENGINEERING

FOR CUSTOMER SUCCESS
MANAGEMENT



CSMastery.com

Prompt Engineering for Customer Success Management

A Comprehensive Guide

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Introduction:

In today's competitive SaaS landscape, Customer Success Managers (CSMs) face the challenge of supporting more customers with limited resources while maintaining high-quality service. Prompt engineering—the art of crafting effective instructions for AI systems like ChatGPT—has emerged as a powerful technique to enhance CSM efficiency, automate routine tasks, and deliver personalized customer experiences at scale.

This guide provides practical prompt templates for CSMs to leverage AI tools in their daily workflows. From optimizing workloads to spotting expansion opportunities and preventing churn, these prompts will help you work smarter, not harder, enabling you to focus on strategic relationships while AI handles repetitive tasks.

As industry expert Lincoln Murphy notes, "Knowing how to write prompts is a skill you need to have to remain relevant in your career and effective in your role." This guide will help you develop that skill specifically for Customer Success applications.

| [Tip: Before diving into the specific prompt templates, take time to identify your most time consuming CSM tasks. These are often the best candidates for AI assistance through prompt engineering.](#) |

1. CSM Workload Optimisation

CSM Meeting Preparation

Prompt:

You are an expert Customer Success Manager preparing for an important customer meeting.

Portal ID: [CUSTOMER_ID]

Meeting Type: [MEETING_TYPE - recurring/QBR/renewal/etc.]

Meeting Objective: [PRIMARY_OBJECTIVE]

Recent Context:

Last Meeting Summary: [LAST_MEETING_SUMMARY]

Recent Support Tickets: [RECENT_TICKETS]

Product Usage Changes: [USAGE_CHANGES]

Health Score: [HEALTH_SCORE] ([HEALTH_TREND])

Key Stakeholders Attending: [ATTENDEES]

Create a comprehensive meeting preparation document that includes:

- . Executive summary of current situation (3-4 sentences)
- . Key discussion points for this meeting (3-5 bullets)
- . Recent wins or positive developments to highlight
- . Areas of concern or risk to address
- . Specific questions to ask the customer
- . Recommended next steps after the meeting

Your response should be concise, actionable, and specific to this customer's situation.

| Warning: Avoid entering generic placeholder information in the prompt. The more specific and detailed your input data, especially regarding recent customer interactions and metrics, the more tailored and useful your meeting prep document will be. |

Sample Answer:

Meeting Preparation: Acme Corporation

Recurring Check-in: Adoption Improvement & Product Updates

Executive Summary

Acme Corporation is currently at a critical juncture with a health score of 7.2 (down 0.5 points over 30 days) primarily due to declining usage in the reporting module. Their contract renews in 4 months, and while overall adoption remains steady at 68%, the recent implementation of the workflow automation feature has received positive feedback from the implementation team. The upcoming release of the analytics dashboard aligns well with their expressed need for better data visualization capabilities.

Key Discussion Points

- . Results from workflow automation implementation (ROI and efficiency gains)
- . Declining usage patterns in reporting module and potential causes
- . Preview of upcoming analytics dashboard and alignment with their visualization needs
- . Training plan for new team members following their recent reorganization . Preparation timeline for renewal discussions (4 months out)

Recent Wins to Highlight

- Successful implementation of workflow automation resulting in 15% time savings reported by their implementation team
- Resolution of all three priority support tickets from last month's technical issues Increased adoption in the collaboration module (up 12% in the last 30 days)
- Positive feedback from Sarah (IT Director) about the new permission management system

Areas of Concern

- Declining usage in reporting module (down 23% in 30 days)
- Two new support tickets regarding API connection issues
- Limited engagement from finance department stakeholders
- Reorganization has introduced new team members unfamiliar with the platform

Questions to Ask

- . "How has the workflow automation feature impacted your team's efficiency over the past month?"
- . "We've noticed a decline in usage of the reporting module. What challenges are your teams experiencing with this feature?"
- . "What specific metrics would you like to see in the upcoming analytics dashboard to help with your quarterly planning?"
- . "Following your recent reorganization, what support do the new team members need to get up to speed quickly?"
- . "What are your key business priorities for the upcoming quarter that we should align our support around?"

Recommended Next Steps

- . Schedule analytics dashboard preview demo for next week
- . Arrange targeted training session for new team members
- . Investigate API connection issues with our technical team before next meeting
- . Prepare renewal discussion document for review at next leadership meeting
- . Connect Sarah with our product team to provide feedback on permission system enhancements

Customer Outreach Prioritization & Planning

Prompt:

I need your help in prioritizing my outreach to my book of business. Let's build a prioritization logic based on data. I will tell you the name of each data point and its rank in priority. You will build the logic of outreach priority, then I will share a table with all my customers and relevant data points, and you will analyze this table and build an engagement cadence over the next 3 months

The key data points to prioritize are:

- Customer priority category
- Days since last connected call
- Next renewal date
- Product usage score
- Highest edition tier (Enterprise, Pro, Starter)

My constraints are:

- I need to cover at least 70% of my customer book ([TOTAL_CUSTOMER_COUNT] customers)
- I want to distribute calls evenly across all tiers
- I have 15 meeting slots available per week
- Need to account for 20% no-show or reschedule rate

Please create a prioritization scoring system and a 3-month engagement calendar that optimizes my customer outreach.

Email Communication Efficiency

Prompt:

Draft a personalized email to [Customer Name] from [Company] addressing the following points:

- Acknowledge their recent [achievement/milestone/issue]
- Provide an update on [feature they're waiting for/support ticket]
- Share one relevant best practice based on their usage patterns
- Suggest a specific next step with clear value proposition
- Tone should be professional yet conversational.
- Aim for brevity (under 150 words) while maintaining a helpful approach.

Documentation Automation

Prompt:

Transform my raw meeting notes below into a structured, professional customer interaction summary for our CRM:

[Paste your rough meeting notes]

Include:

- . Meeting objective and attendees
- . Key discussion points categorized by topic
- . Customer sentiment analysis
- . Action items with owners and deadlines
- . Strategic recommendations
- . Next steps and follow-up schedule

Format it to be clear, concise, and actionable for other team members.

Workflow Optimization Analysis

Prompt:

Analyze my current customer success workflow described below and suggest improvements to increase efficiency without sacrificing quality:

[Describe your current process]

Consider:

- . Tasks that could be automated
- . More efficient communication channels

- . Potential template creation opportunities
- . Cross-functional collaboration improvements
- . Customer touchpoint optimization

Provide specific, actionable recommendations I can implement immediately, plus longer-term strategic changes.

2. Spotting Opportunities for Expansion

| Tip: When creating expansion opportunity prompts, focus on data-driven insights rather than sales language. This helps maintain your trusted advisor relationship with customers while still identifying genuine growth opportunities. |

Usage Pattern Analysis for Expansion

Prompt:

Analyze the following customer usage data to identify potential expansion opportunities:

Customer: [Customer Name] Current plan: [Plan details] User count: [Current number] out of [Licensed number] Feature utilization: [List of features and usage percentages] Recent growth metrics: [Any relevant metrics]

Based on this data, please:

- . Identify top 3 expansion opportunities (additional seats, feature upgrades, etc.)
- . Craft a value-based pitch for each opportunity
- . Suggest timing for each conversation
- . Provide objection handling guidance for common pushbacks

Sample Answer:

Expansion Opportunity Analysis: TechNova Inc.

Current Situation Summary

TechNova Inc. is a mid-market manufacturing company currently on our Professional plan (\$2,800/month) with 78 active users out of 100 licensed seats (78% utilization). They've experienced 12% employee growth in the last quarter and have shown consistent usage increases in workflow automation (92% utilization), document management (87% utilization), and reporting (76% utilization). Advanced analytics, API integrations, and mobile access remain underutilized at 34%, 28%, and 22% respectively.

Top 3 Expansion Opportunities

1. Additional User Licenses (+25 seats)

Value-Based Pitch: "Based on your company's 12% quarterly growth rate and current 78% seat utilization, you'll likely exceed your licensed user count within the next 60 days. Proactively increasing your seat allocation by 25 would accommodate your projected growth for the next two quarters while maintaining access continuity for all team members. With our volume pricing, these additional seats would come at a 15% discount compared to your current per-seat rate, resulting in approximately \$3,900 additional monthly value while supporting your planned expansion into the eastern region."

Suggested Timing: Initiate this conversation immediately as they are approaching the 80% utilization threshold that typically triggers procurement delays. Position as proactive planning rather than reactive necessity.

Objection Handling:

"We're not sure about our actual growth timeline": Offer flexible ramp-up options where additional seats activate only when needed over the next 6 months

"Budget is tight right now": Highlight productivity costs of access limitations and offer quarterly payment adjustments rather than immediate increase

"We need to review actual usage first": Provide detailed usage analytics showing growth trajectory and offer to conduct joint review with department heads

2. Advanced Analytics Module Upgrade

Value-Based Pitch: "Your team's increasing usage of basic reporting features (76% utilization, up 23% this quarter) signals a growing need for data-driven insights. The manufacturing dashboards in our Advanced Analytics module would deliver the customized efficiency metrics your operations director requested last month. Based on industry benchmarks, similar manufacturers have achieved 9-12% production efficiency improvements through these analytics capabilities, which for your operations would translate to approximately \$380,000 in annual savings based on your reported production volumes."

Suggested Timing: Position during mid-quarter business review (2-3 weeks from now) when they'll be planning for next quarter's KPIs.

Objection Handling:

"We don't have analytics expertise in-house": Include 10 hours of dedicated analytics implementation support with our Solutions team

"We're uncertain about the ROI": Offer a 60-day implementation assessment with defined success metrics before full financial commitment

"Our data quality isn't ready": Provide our data preparation assessment and basic cleanup services at no additional cost

3. Mobile Access Enablement Package

Value-Based Pitch: "With your field service team's recent expansion (14 new technicians this quarter), enabling our Mobile Access package would eliminate the manual data entry that currently causes 1-2 day reporting delays. Your operations team specifically mentioned this pain point during our last review. Based on your current process, we estimate this would save each technician approximately 5 hours weekly on paperwork while improving data accuracy. For your 32-person field team, this represents over 8,000 annual hours redirected to customer service, or approximately \$320,000 in recovered productivity based on your average technician salary."

Suggested Timing: Time this conversation after their field service quarterly planning meeting next month, when pain points from manual processes will be freshly discussed.

Objection Handling:

"Mobile security is a concern": Highlight our SOC 2 compliance, device management features, and ability to restrict data access by role

"Training the field team would be difficult": Include our Field Adoption Program with custom video training and in-field QR guides at no additional cost

"We need to prioritize other initiatives first": Offer phased rollout starting with high-impact teams, using success metrics to justify broader implementation

Recommended Approach

Begin with the additional seats conversation immediately, as this represents both an immediate need and the lowest implementation complexity. Follow with the Advanced Analytics discussion during the mid-quarter business review, positioning it as a strategic enhancement aligned with their increasing data utilization. Save the Mobile Access conversation for after their field service planning session when operational pain points will be

top of mind.

Multi-threading Strategy

Prompt:

Help me develop a multi-threading strategy for [Customer Organization] to strengthen our relationship and identify expansion opportunities.

Current contacts: [List current contacts, their roles, and relationship status]

Company info:

- Industry: [Industry]
- Size: [Employee count]
- Structure: [Any known org structure]
- Business objectives: [If known]

Please create:

- . A stakeholder map identifying key roles we should connect with
- . Personalized outreach strategies for each role
- . Specific value propositions tailored to each stakeholder's priorities
- . Content/resources to share with each stakeholder
- . Internal collaboration suggestions to facilitate these connections

Expansion Readiness Assessment

Prompt:

Create an expansion readiness assessment for [Customer] based on the following data:

Current product adoption: [Percentage] Key feature usage: [List features and usage] User sentiment: [If available] Support ticket volume: [Number and trend] Time since implementation: [Duration] Contract value: [Current value] Renewal date: [Date]

Please analyze:

- . Is this customer ready for expansion conversation?
- . What signals indicate expansion readiness or barriers?
- . What product areas show opportunity based on usage patterns?
- . How should we time the expansion conversation in relation to their renewal?
- . What preparation is needed before initiating the expansion discussion?

Upsell/Cross-sell Value Proposition Generator

Prompt:

Create compelling value propositions for the following upsell/cross-sell opportunity:

Customer: [Customer Name] Current solution: [Current product/package] Potential upsell/cross sell: [Upgrade option] Customer's main business goals: [List goals] Pain points identified: [List pain points] Recent wins: [List successes]

Please generate:

- . A customer-centric value proposition that connects the upgrade to their business outcomes

- . 3-5 bullet points highlighting specific benefits tailored to their situation
- . A concise ROI statement or calculation if possible
- . A natural conversation opener to introduce this opportunity
- . 2-3 customer success stories with similar profiles who have benefited from this upgrade

Executive Business Review Expansion Framework

Prompt:

Help me prepare the expansion opportunity section for an upcoming Executive Business Review with [Customer].

Current situation:

- Relationship duration: [Time]
- Current solutions: [Products/Services]
- Business outcomes achieved: [List outcomes]
- Utilization metrics: [Key metrics]
- Strategic initiatives: [Known company initiatives]

Create a compelling expansion narrative that:

- Connects their business strategy to our additional capabilities
- Demonstrates ROI from current investment to build credibility
- Presents logical next steps in their success journey with our solution
- Includes relevant benchmark data from similar customers
- Provides clear, value-focused next steps

3. Renewal Risk Analysis

| Warning: When analyzing renewal risk, always ensure you have the most current data available. Outdated metrics can lead to misdiagnosis of risk factors and ineffective mitigation strategies. If your data is more than two weeks old, flag this limitation in your analysis. |

Comprehensive Renewal Risk Assessment

Prompt:

You are an expert Customer Success strategist with deep experience in renewal management and risk mitigation. Your task is to analyze portal id renewal risk factors and provide a detailed explanation with specific mitigation strategies.

Current Renewal Context:

- Renewal Date: [RENEWAL_DATE] (Days remaining: [DAYS_TO_RENEWAL])
- Current Health Score: [HEALTH_SCORE] ([HEALTH_TREND] over last 90 days)
 - Contract Value: [CONTRACT_VALUE] and if applicable recent MRR changes such as downgrade or cancelation
- Primary Use Case status: [USE_CASE_STATUS]

Key Metrics:

- Product Usage: [USAGE_METRICS] and [USAGE_TREND] compared to similar customers from the same industry
 - Feature Adoption: [FEATURE_ADOPTION_PERCENTAGE] of purchased capabilities
 - User Engagement: [ACTIVE_USERS]/[TOTAL_LICENSES] active in last 30 days

Recent Customer Interactions:

- Last notes Meeting with sentiment: [MEETING_NOTES]
- Recent Customer Feedback summary: [FEEDBACK_SUMMARY]
- Open Escalations or negative sentiment: [ESCALATIONS]

Historical Context:

- Customer Maturity Phase: [MATURITY_PHASE]

- Original Business Case Status: [BUSINESS_CASE_STATUS]
- POC Changes if applicable: [POC_CHANGES]

Based on this information, provide:

- **Renewal Risk Assessment:** A detailed narrative explaining the customer's current renewal risk level, identifying the primary contributing factors and their relative importance.
- **Warning Signs Analysis:** An explanation of which metrics or behaviors are most concerning and why, including any patterns that match previously churned customers.
- **Positive Factors:** Identification of any strong positive indicators that could be leveraged during renewal conversations.
- **Root Cause Analysis:** An assessment of the underlying causes behind the risk factors, distinguishing between product issues, relationship challenges, business changes, or other factors.
- **Mitigation Strategy:** 3-5 specific, prioritized actions the CSM should take to address the risk factors, with timeline recommendations.
- **Talking Points:** Suggested conversation starters or questions for the CSM to use with key stakeholders to address concerns.
- **Success Criteria:** Clear indicators that would show the mitigation strategy is working.

Your analysis should be specific, actionable, and tailored to this customer's unique situation. Focus on identifying the most impactful interventions rather than generic advice.

Sample Answer:

Renewal risk analysis : ACME Corporation

Executive Summary:

ACME Corporation presents a Medium-High Renewal Risk (72% risk score) primarily driven by declining executive engagement, underutilization of key features, and recent competitor

evaluations mentioned in support interactions. While product usage remains strong among technical users, the value perception at the executive level has deteriorated over the past quarter, creating significant renewal vulnerability with 73 days remaining until renewal.

1. Detailed Risk Assessment

Primary Risk Factors (in order of impact):

Executive Sponsor Disengagement (High Impact)

- CFO Sarah Johnson, who originally championed the purchase, has missed the last three quarterly reviews
- Communication frequency with executive team has declined 68% compared to previous contract term
- Recent reorganization has placed your solution under a new VP with no previous relationship history

Underutilization of Premium Features (Medium-High Impact)

- Only 42% of premium features included in Enterprise plan are being actively used
- Advanced analytics module (key differentiation from competitors) shows no usage in past 60 days
- ROI calculation is undermined by low adoption of highest-value capabilities

Competitive Pressure Signals (Medium Impact)

- Three mentions of Competitor X in support tickets within last 45 days
- IT Director requested data export documentation last month
- LinkedIn shows two new hires from companies that use Competitor X's solution

Support Satisfaction Decline (Medium-Low Impact)

- Average ticket resolution time increased from 6 hours to 15 hours in past quarter
- Two escalations required VP of Support intervention
- CSAT for support has dropped from 4.7 to 3.8 (out of 5)

2.Warning Signs Analysis

The combination of executive disengagement and competitive mentions represents a critical warning pattern. Analysis of 27 previously churned customers revealed that 82% showed similar patterns within 90 days of renewal. The recent request for data export documentation particularly matches pre-migration behavior seen in 14 churned customers.

The decline in premium feature usage began approximately 3 months ago, coinciding with the departure of Power User Michael Chen. Without his advocacy, team usage has reverted to basic features only, creating vulnerability to lower-cost alternatives.

3.Positive Factors to Leverage

Despite these concerns, several positive factors offer mitigation opportunities:

- Strong Technical User Satisfaction: Core users maintain high NPS (+42)
- Critical Workflow Integration: Your solution is embedded in daily operations with 218 active workflows
- Historical Investment: Customer has spent approximately 320 hours configuring and customizing your platform
- Recent Feature Adoption: Team is actively using the new mobile capabilities released last month

4.Root Cause Analysis

The primary risk drivers appear to stem from:

- Organizational Change: The loss of both the executive sponsor's attention and the power user's expertise has created a knowledge and advocacy gap
- Value Communication Failure: ROI and strategic benefits are not being effectively communicated to new stakeholders

- Feature Awareness Gap: Users appear unaware of premium capabilities that would address several pain points mentioned in recent tickets
- Competitor Outreach: Evidence suggests Competitor X has recently engaged with the customer

5. Mitigation Strategy

Immediate Actions (Next 7 Days):

- Schedule executive briefing with new VP owner to reestablish executive relationships
- Prepare business impact summary focused on departmental KPIs
- Leverage IT Director relationship to secure introduction

Short-Term Actions (8-21 Days):

- Conduct focused training session on underutilized premium features
- Target specific team members identified as potential power users
- Demonstrate direct connection to pain points mentioned in support tickets
- Proactively address data security and export capabilities
- Share enhanced security documentation
- Offer migration assessment to identify potential transition challenges

Medium-Term Actions (22-45 Days):

- Develop customer-specific ROI analysis highlighting realized and potential value Include comparison to total cost of ownership with competitors
- Quantify switching costs and implementation timeline realities
- Establish executive sponsorship program to rebuild C-level engagement Identify and nurture potential new champion
- Create executive business review focusing on strategic initiatives

6.Recommended Talking Points

When engaging with IT Director James Williams:

"I noticed several questions about advanced analytics capabilities. Would it be valuable to arrange a focused session on how other companies in your industry are leveraging these features for [specific relevant outcome]?"

"We've helped several organizations streamline the exact workflow you mentioned in our last call. Could we schedule 30 minutes to explore how the premium features you already own could eliminate those manual steps?"

For conversation with new VP owner Patricia Martinez:

"I understand your team has gone through recent changes. I'd appreciate the opportunity to briefly share how our solution aligns with your departmental goals for this year."

"Several of our customers in [similar industry] have used our platform to address [specific business challenge]. Is that a priority area for your team as well?"

7.Success Criteria

The following indicators would suggest the mitigation strategy is working:

- Reengagement of executive stakeholders (meeting attendance and participation)
- Increased usage of at least 3 premium features (>20% adoption)
- Reduction in competitor mentions in communications
- Improvement in support satisfaction metrics
- Proactive discussion of renewal timeline and terms

Recommendation: This customer requires a Red Flag response with weekly monitoring of key metrics and engagement from CS leadership to prevent churn.

Health Score Enhancement

Prompt:

Review our current customer health score methodology and suggest improvements based on renewal prediction accuracy:

- Current health score components: [List current metrics and weightings] Historical data:
- Customers who churned despite good health: [Examples]
- Customers who renewed despite poor health: [Examples]

Please recommend:

- Additional metrics we should incorporate to better predict renewal
- Adjustments to current metric weightings
- Leading indicators that might provide earlier warning
- Segment-specific considerations for more accurate scoring
- Implementation approach for these improvements

Renewal Conversation Preparation

Prompt:

Help me prepare for an upcoming renewal discussion with [Customer], who has shown some signs of risk.

Current situation:

- Renewal date: [Date]
- Contract value: [Amount]
- Relationship summary: [Brief history]
- Value delivered: [Metrics if available]
- Risk signals: [List concerns]
- Champion status: [Strong/Weak/Departed]

Please create:

- A strategic conversation guide with key talking points
- Questions to uncover unstated objections or concerns
- Value reinforcement statements based on their specific outcomes
- Negotiation parameters and potential concessions if needed
- Post-meeting follow-up plan based on possible scenarios

Competitor Differentiation for Retention

Prompt:

Our customer [Customer Name] has mentioned they're evaluating [Competitor] as an alternative. Help me create differentiation points for our renewal conversation.

- Our solution's strengths: [List key strengths]
- Customer's priorities: [List known priorities]
- Competitor known weaknesses: [Any known weaknesses]

Please develop:

- A side-by-side comparison focused on areas most important to this customer
- Specific examples of value we've delivered that the competitor cannot match
- Strategic questions that highlight competitor limitations without being negative
- Talking points addressing potential competitor claims
- A risk mitigation plan if price is the main objection

Renewal Risk Early Warning System

Prompt:

Design an early warning system to identify renewal risks before they become critical.

- Our current process: [Describe current monitoring approach]
- Available data sources: [List available customer data]
- Common churn reasons: [List historical reasons]

Please create:

- A systematic approach to monitoring key risk indicators
- Thresholds that should trigger different levels of intervention
- A playbook of responses for different risk scenarios
- Cross-functional collaboration suggestions for risk mitigation
- Measurement approach to evaluate impact of risk detection

4. Disengagement Analysis & Re-Engagement Strategy

| Tip: When crafting re-engagement strategies, timing is crucial. Research shows that reaching out within 2-3 business days of detecting significant disengagement can increase response rates by up to 58% compared to waiting two weeks or longer. |

Disengagement Analysis & Re-Engagement Strategy

Prompt:

You are an expert Customer Success strategist specializing in customer re-engagement. Analyze the following disengaged customer and create a personalized re-engagement strategy.

CUSTOMER INFORMATION:

- Portal ID: [PORTAL_ID]
- Industry: [INDUSTRY]
- Size: [COMPANY_SIZE]
- Customer Since: [START_DATE]
- Current Health Score: [HEALTH_SCORE] (Declined from [PREVIOUS_HEALTH_SCORE])

DISENGAGEMENT INDICATORS:

- Last Login Date: [LAST_LOGIN_DATE] ([DAYS_SINCE_LOGIN] days ago)
- Previous Login Frequency: [PREVIOUS_LOGIN_FREQUENCY]
- Last Meeting Date: [LAST_MEETING_DATE] ([DAYS_SINCE_MEETING] days ago)
- Last Response to CSM: [LAST_RESPONSE_DATE]
- Feature Usage Decline: [FEATURE_USAGE_CHANGE]

HISTORICAL ENGAGEMENT PATTERNS:

- Most Engaged Users: [TOP_USERS] (roles: [TOP_USER_ROLES])
- Most Used Features (Previously): [TOP_FEATURES]
- Historically Effective Touch Points: [EFFECTIVE_TOUCHPOINTS]
- Topics That Generated Response: [ENGAGING_TOPICS]
- Customer Priorities (From Previous Calls): [STATED_PRIORITIES]
- Success Stories or Wins: [PREVIOUS_WINS]

POTENTIAL DISENGAGEMENT FACTORS:

- Recent Support Issues: [SUPPORT_ISSUES]
- Product Changes: [PRODUCT_CHANGES]
- Customer Organization Changes: [ORG_CHANGES]
- Competitor Mentions: [COMPETITOR_MENTIONS]
- External Market Factors: [MARKET_FACTORS]

Based on this information, provide:

- **DISENGAGEMENT ROOT CAUSE ANALYSIS:** Analyze the most likely reasons for disengagement based on the patterns and timing of usage decline.
- **PERSONALIZED RE-ENGAGEMENT HOOK:** Create a compelling, specific reason for the customer to re-engage that addresses their likely concerns and offers immediate value.
- **OUTREACH MESSAGE:** Draft a personalized email that the CSM can send that references specific customer history, acknowledges the gap in engagement without being accusatory, and offers a clear value proposition for re-engaging.
- **CONVERSATION GUIDE:** If the customer responds, provide 5-7 specific questions the CSM should ask to understand the disengagement causes and reestablish the relationship.

- **VALUE REINFORCEMENT STRATEGY:** Suggest 3 specific ways to demonstrate value quickly if the customer agrees to reconnect, based on their historical priorities and usage patterns.

Focus on being specific to this customer's situation, not generic advice. Prioritize empathy and value delivery rather than sales or contractual language.

Sample Answer:

Re-Engagement Strategy: GlobalTech Industries

Disengagement Root Cause Analysis

Based on the data patterns and timing, GlobalTech's disengagement appears to stem from three primary factors:

- **Leadership Transition Impact (High Probability - 70%)** The disengagement timeline directly correlates with the departure of VP of Operations Jennifer Morris (45 days ago), who was your primary champion and most engaged executive user. Her replacement, Thomas Chen, has no historical engagement with the platform and likely lacks context on the strategic importance of your solution. This organizational change appears to be the catalyst for the broader disengagement.
- **Unresolved Support Issues (Medium Probability - 60%)** The two critical API integration tickets that remained unresolved for 12+ days occurred immediately before the sharp decline in login frequency (from 3x weekly to 0x). The timing strongly suggests these technical challenges created significant friction at a vulnerable moment when your champion was departing.
- **Value Perception Gap (Medium Probability - 55%)** The disengagement coincides with their fiscal year planning period, suggesting your solution may have been deprioritized in budget discussions. This is supported by the recent LinkedIn post from their CTO mentioning "vendor consolidation initiatives" and the fact that their most recent success metrics have not been updated in your system for 65+ days.

Secondary Factors:

- The recent platform UI update coincided with disengagement, potentially creating navigation confusion
- The implementation of their new ERP system (mentioned in their last quarterly meeting) may have shifted priorities
- Industry downturn in manufacturing technology (noted in market factors) may be creating budget pressures

Personalized Re-Engagement Hook

Recommended Approach: Operation Impact Refresher with New Leadership

"Help new VP of Operations Thomas Chen quantify the \$342,000 in operational savings your team achieved using our platform last year, with a focused 30-minute data review showing how continued use supports his stated priority of increasing manufacturing efficiency."

This hook addresses the leadership transition directly, connects to their historical ROI, bridges to the new leader's known priorities, and offers immediate value in a time-efficient format.

Outreach Message

Subject: Continuing Your Manufacturing Efficiency Gains - Quick Update for

Thomas Hi Thomas,

I hope your first month as VP of Operations at GlobalTech has been going well. I'm Mark Stevens, your dedicated Customer Success Manager for [Product Name].

Jennifer Morris shared with me your focus on manufacturing efficiency improvements before her departure, and I wanted to connect briefly about the \$342,000 in operational savings your team

documented using our platform in 2023 (particularly the 32% reduction in quality incident resolution time that Ryan's team achieved using our workflow automation).

I've noticed your team's usage of these workflow tools has decreased recently, and I'm concerned this might impact the efficiency metrics you're responsible for. Two specific opportunities I've identified:

- . The new predictive maintenance feature directly addresses the equipment downtime challenges you mentioned in your recent industry panel discussion
- . We could help integrate our solution with your new ERP system to eliminate the duplicate data entry Ryan mentioned was consuming 5+ hours weekly

Would you be open to a focused 30-minute session next week to review your team's historical ROI and explore how these capabilities align with your current objectives? I'm available Tuesday or Thursday afternoon if either works for you.

Best regards,
Mark Stevens, Customer Success Manager

Conversation Guide

If Thomas responds, use these questions to understand disengagement causes and reestablish the relationship:

- . "Since taking over from Jennifer, what have been your top priorities for the operations team, and how have they evolved from previous leadership?" (Establishes current priorities and potential shifts)
- . "I understand you've recently implemented a new ERP system. How has that transition been going, and what operational challenges remain?" (Explores competing priorities and integration opportunities)
- . "The team previously achieved significant time savings through our workflow automation. Are those processes still important to your operation, or have needs shifted?" (Validates continued relevance of previous value drivers)
- . "What metrics are you personally evaluated on in your role, and how do you currently measure progress against them?" (Identifies personal motivation factors)
- . "We noticed some API integration challenges around the time usage declined. How did those technical issues impact your team's workflows?" (Gently addresses support issues)
- . "I saw the company announcement about vendor consolidation initiatives. What criteria are you using to evaluate technology partners in that process?" (Addresses potential budget/vendor decisions)
- . "If we were to focus on just one aspect of our platform that would deliver the most value to your current priorities, what would that be?" (Identifies focus area for immediate value demonstration)

Value Reinforcement Strategy

Based on GlobalTech's historical priorities and usage patterns, demonstrate value quickly through:

. Customized ROI Assessment & Forecast

- Create a one-page executive summary documenting GlobalTech's historical \$342K cost savings
- Combine with current manufacturing efficiency benchmarks from similar customers
- Include a 12-month projection showing potential additional savings of \$420K based on features they already own
- Delivery Timeline: Within 48 hours of reconnection call
- Owner: CSM with Support from Customer Value Engineering team

. ERP Integration Quick-Win Workshop

- Schedule a 60-minute technical session between their ERP admin and your integration specialist
- Focus specifically on eliminating the duplicate data entry process (5+ hours/week savings)
- Prepare a simplified integration plan with 2-week implementation timeline Delivery Timeline: Within 7 days of reconnection
- Owner: CSM + Technical Integration Specialist

. Executive Briefing on Predictive Maintenance ROI

- Develop a 15-minute case study presentation highlighting three manufacturing customers' results
- Focus on the 27% equipment downtime reduction achieved by their competitor GlobalManufacturing

- Include a simplified activation checklist for their existing, unused predictive features Delivery Timeline: Within 10 days of reconnection
- Owner: CSM with Executive Strategy Consultant

Each of these reinforcement strategies directly connects to historical priorities (efficiency, automation, equipment uptime), addresses likely pain points (ERP transition, leadership metrics proof), and delivers immediate value without requiring significant customer time investment.

Next Steps & Follow-up Cadence

- . Send initial outreach email on Tuesday morning (their historically highest response time) . If no response within 3 days, follow up with a condensed message focused solely on the ERP integration opportunity
- . If still no response, attempt to connect with Ryan Thompson (power user) with a more technical message about new features
- . Track engagement signals (email opens, link clicks) and adjust approach accordingly
- . Document all communications in CRM for renewal discussion preparation

Data-Driven Re-Engagement Plan

Prompt:

You are an expert in product usage analytics and customer success strategies. Create a data driven re-engagement plan for a customer showing concerning usage patterns.

CUSTOMER DETAILS:

Portal ID: [PORTAL_ID]

USAGE PATTERN ANALYSIS:

- Usage Pattern Type: [USAGE_PATTERN_TYPE] (e.g., Declining, Stagnant, Inconsistent, Feature-Limited)
- Key Usage Metrics Trend: [USAGE_METRICS_TREND]
- Critical Feature Adoption: [FEATURE_ADOPTION_RATES]
- User Adoption Distribution: [USER_ADOPTION_DISTRIBUTION]
- Workflow Completion Rates: [WORKFLOW_COMPLETION_RATES]
- Comparison to Similar Customers: [PEER_COMPARISON]

USER BEHAVIOR INSIGHTS:

- Most Engaged users: [ENGAGED_ROLES]
- Disengaged users: [DISENGAGED_PERSONAS]
- Usage Time Patterns: [USAGE_TIME_PATTERNS]
- Successful Use cases: [SUCCESSFUL_JOURNEYS]

VALUE REALIZATION GAPS:

- Unrealized Use Cases: [UNREALIZED_USE_CASES]
- Configured vs. Utilized Capabilities: [CONFIGURED_VS_UTILIZED]
- Benchmark Comparison: [BENCHMARK_GAPS]
- Estimate ROI Impact of Current Usage: [CURRENT_ROI_ESTIMATE]
- Potential ROI with Optimal Usage: [POTENTIAL_ROI]

| Warning: Never use language in your outreach that makes the customer feel like they're being monitored or surveilled. Focus on providing value rather than highlighting their disengagement directly. |

Based on this usage analysis, provide:

- **USAGE PATTERN DIAGNOSIS:** Identify the specific usage pattern concerns and their business impact on this customer.
- **RE-ENGAGEMENT HYPOTHESIS:** Develop a hypothesis about why this usage pattern is occurring and what might effectively re-engage the customer.
- **DATA-DRIVEN OUTREACH:** Create a specific outreach message that references their actual usage data in a constructive way and offers a clear path to improved outcomes.
- **VALUE ACCELERATION PLAN:** Design a 30-day plan with specific milestones to help this customer quickly achieve better results based on their historical usage patterns and business goals.
- **SUCCESS METRICS:** Define clear metrics to track the effectiveness of the re-engagement plan.

Ensure all recommendations are specific to this customer's actual usage patterns and business context. Focus on achievable gains that would demonstrate quick wins alongside longer-term value.

Re-Engagement Campaign Designer

Prompt:

Create a multi-touch re-engagement campaign for our disengaged customer

segment: Segment characteristics:

- Usage decline: [Percentage drop]
- Typical company size: [Size range]
- Common use cases: [List use cases]
- Last active: [Timeframe]
- Original value proposition: [Value promised]

Design a 30-day re-engagement campaign including:

- Campaign objectives and success metrics
- Sequence of touch points across channels (email, in-app, phone, etc.)
- Specific content/value for each touch
- Escalation path if initial touches don't succeed
- Feedback collection mechanism to understand disengagement causes

Executive Sponsor Re-Engagement

Prompt:

Our executive sponsor at [Customer] has become disengaged. Help me develop a strategy to rebuild this critical relationship.

Background:

- Previous engagement level: [Description]
- Last meaningful interaction: [Date/nature]
- Known priorities/interests: [List if available]
- Company's strategic initiatives: [If known]
- Internal champion status: [Active/Passive/Departed]

Please create:

- An outreach strategy that respects their seniority while re-establishing relevance
- High-value conversation topics aligned with executive priorities
- Social proof elements from peer companies/executives
- Supporting materials preparation checklist
- Success criteria for the re-engagement effort

Value Reinforcement for Re-Engagement

Prompt:

Help me create a value reinforcement strategy for [Customer] who has experienced decreased engagement after initial success.

Initial success metrics: [List early wins and outcomes]

Current situation:

- Usage decline areas: [Specific features]
- Business changes: [Any known changes]
- Support inquiries: [Recent patterns]
- Stakeholder changes: [Any turnover]

Please develop:

- A "value recap" presentation highlighting achieved outcomes
- New use cases relevant to their evolving business needs
- ROI calculation refresh with current metrics
- Success stories from similar customers who overcame similar challenges
- Incremental value roadmap showing path to increased outcomes

5. Increasing Adoption Strategies

| Tip: When creating adoption strategies, remember the "Rule of 3": Focus on driving adoption of no more than three features at a time. Research shows that targeting too many capabilities simultaneously often results in lower overall adoption compared to a more focused approach. |

Adoption Barrier Analysis

Prompt:

Analyze the following adoption data to identify barriers and recommend strategies to increase adoption:

- Customer: [Customer Name]
- Implementation date: [Date]
- Current adoption rate: [Percentage]
- Adoption by department/team: [Break down by department]
- Features with low adoption: [List features and rates]
- Training completed: [Summary]

Please provide:

- Root cause analysis of adoption barriers
- Segment-specific adoption strategies
- Feature-specific promotion approaches
- Success metrics to track adoption improvement
- Timeline for implementation with key milestones

Sample Answer:

Adoption Barrier Analysis & Strategy: Meridian Financial

Executive Summary

Meridian Financial implemented our platform 4 months ago and currently shows an overall adoption rate of 47%, significantly below the industry benchmark of 65% for financial services companies at this stage. While the Finance department demonstrates strong engagement (72% adoption), the Operations (38%), Marketing (35%), and IT departments (43%) face significant barriers. Key features including Advanced Reporting, API Integration, and Workflow Automation remain critically underutilized (<25% adoption). This analysis identifies the root causes for these adoption gaps and provides targeted strategies to increase adoption by at least 20 percentage points within the next 90 days.

1. Root Cause Analysis of Adoption Barriers

Cross-Departmental Barriers

. Incomplete Onboarding & Training (High Impact)

- Only 42% of users have completed basic training (vs. 85% benchmark)
- Advanced feature training completion rate is just 17%
- No role-specific training paths were established during implementation
- No training reinforcement program exists after initial sessions

. Lack of Executive Sponsorship (Medium Impact)

- Executive participation in implementation was limited to kick-off
- No executive-level success metrics were established
- Department leaders received no adoption reporting

- No cross-functional steering committee was formed

. Workflow Integration Gaps (High Impact)

- Platform was implemented as standalone rather than integrated solution
- Users report "duplicate work" in satisfaction surveys
- Manual data transfer between systems creates friction
- No custom workflows were established during implementation

Department-Specific Barriers

. Operations Department (38% Adoption)

- Complex approval workflows not mapped to platform capabilities
- Team experienced two failed data imports during implementation
- Key stakeholder (Operations Director) changed midway through implementation
- Team perceives platform as "Finance's tool" based on survey feedback

. Marketing Department (35% Adoption)

- Most critical need (campaign analytics integration) was deprioritized during implementation
- Marketing-specific use cases were not included in training
- Team has existing alternative tools with some overlapping functionality
- Marketing team located remotely, received only virtual training

. IT Department (43% Adoption)

- IT team was involved only minimally during implementation
- API documentation not provided during technical handoff
- Security concerns raised but not fully addressed
- Perception that platform creates additional support burden

2.Segment-Specific Adoption Strategies

Operations Department Strategy

Primary Objective: Increase adoption from 38% to 60% within 60 days

Targeted Approach:

. Executive Alignment

- Schedule Operations Director briefing focusing on operational efficiency metrics
- Establish departmental adoption goals tied to leadership objectives
- Create Operations-specific success dashboard for leadership visibility

. Workflow Reengineering

- Conduct workflow mapping session to identify friction points
- Configure 3 custom automation workflows for highest volume processes
- Implement batch data import solution for failed data migration

. Targeted Enablement

- Deliver role-based hands-on training specifically for operations processes
- Create quick reference guides for top 5 operations use cases
- Identify and empower 2-3 power users as internal advocates

Marketing Department Strategy

Primary Objective: Increase adoption from 35% to 58% within 75 days

Targeted Approach:

. Value Acceleration

- Fast-track implementation of campaign analytics integration
- Develop marketing-specific dashboard templates
- Establish ROI tracking specifically for marketing activities

. Competitive Displacement

- Conduct side-by-side feature comparison with current marketing tools
- Create migration path from existing tools to reduce duplication
- Highlight unique capabilities unavailable in current toolset

. Engagement Enhancement

- Schedule in-person training workshop at marketing team location
- Develop marketing-specific use case library with templates
- Establish "Marketing Center of Excellence" with dedicated resources

IT Department Strategy

Primary Objective: Increase adoption from 43% to 65% within 90 days

Targeted Approach:

. Technical Enablement

- Provide comprehensive API documentation and integration playbooks
- Conduct technical workshop focused on system integration capabilities
- Offer developer sandbox environment for testing and familiarization

. Security Remediation

- Address open security concerns with technical deep-dive session
- Provide security whitepaper and compliance documentation

- Schedule security review with IT security team

. Support Integration

- Establish dedicated support channel for IT team questions
- Create troubleshooting guide specific to IT support needs
- Implement monitoring dashboard for system performance

3. Feature-Specific Promotion Approaches

Advanced Reporting (23% Adoption)

Activation Goal: Increase adoption to 50% within 60 days

Promotion Strategy:

- Create department-specific report templates that address immediate needs
- Conduct "Report Builder Workshop" with hands-on exercises
- Implement "Report of the Week" showcase highlighting user success stories
- Develop comparative analysis showing time savings vs. manual reporting
- Launch report request service to build custom reports for key stakeholders

API Integration (18% Adoption)

Activation Goal: Increase adoption to 40% within 75 days

Promotion Strategy:

- Conduct technical webinar demonstrating integration use cases and benefits
- Create integration recipe cards for common scenarios (5-10 examples)
- Offer implementation assistance for first integration project

- Showcase success story from peer company with similar integration needs
- Establish integration office hours for technical Q&A

Workflow Automation (25% Adoption)

Activation Goal: Increase adoption to 55% within 90 days

Promotion Strategy:

- Conduct department-specific workflow mapping sessions
- Implement "Automation Challenge" with recognition for best automation ideas Create workflow template library based on common processes
- Deliver ROI calculator to quantify time savings from automation
- Implement phased approach starting with simple workflows and progressing to complex

4.Success Metrics to Track Adoption Improvement

Primary Metrics

- Department Adoption Rate: Percentage of licensed users actively using the platform weekly by department
- Feature Utilization Rate: Percentage of users leveraging specific features (Advanced Reporting, API Integration, Workflow Automation)
- Training Completion Rate: Percentage of users who have completed role-specific training programs

. Business Outcome Metrics:

- Finance: Monthly close time reduction
- Operations: Process cycle time improvement
- Marketing: Campaign development time reduction
- IT: Ticket reduction related to platform issues

Secondary Metrics

- User Satisfaction Score: Measured through quarterly pulse surveys
- Workflow Efficiency Gain: Time saved through automated processes
- Self-Service Rate: Percentage of users finding answers through knowledge base
- Internal Advocacy Score: Net Promoter Score for internal recommendations
- Login Frequency: Average logins per user per week by department

Organizational Metrics

- Executive Engagement: Number of leadership dashboard views per month
- ROI Realization: Percentage of projected ROI achieved
- Cross-Functional Collaboration: Number of cross-department workflows

5. Implementation Timeline & Key Milestones

Phase 1: Foundation (Weeks 1-2)

- Complete root cause diagnostic with key stakeholders
- Establish executive steering committee
- Define department-specific success metrics
- Complete adoption baseline assessment
- Develop custom training curriculum by role

Phase 2: Enablement (Weeks 3-6)

- Deliver role-based training to all departments
- Implement Operations workflow automation (top 3 processes)

- Deploy Marketing analytics integration
- Provide IT with API documentation and technical workshop
- Launch knowledge base with role-specific resources

Phase 3: Optimization (Weeks 7-10)

- Build custom report templates for each department Implement user feedback mechanism
- Conduct advanced feature workshops
- Establish power user community
- Deploy adoption analytics dashboard for leadership

Phase 4: Reinforcement (Weeks 11-13)

- Launch gamification program for feature adoption Conduct ROI review with executive team
- Implement cross-department workflow showcases
- Deliver success story documentation
- Establish ongoing training calendar

Key Milestones

Week 2: Executive alignment completed

Week 4: Role-based training 100% completed

Week 6: 50% improvement in Operations adoption

Week 8: Marketing analytics integration completed

Week 10: 50% improvement in feature utilization rates

Week 12: Achievement of overall 67% adoption rate 20%+

Week 13: Sustainability plan established for ongoing adoption

Immediate Next Steps

- Schedule executive briefing with CIO and department leaders (Within 48 hours)
- Conduct department-specific user interviews (Week 1)
- Deploy adoption measurement dashboard (Week 1)
- Develop custom training curriculum (Week 2)
- Establish regular adoption review cadence (Biweekly beginning Week 2)

Persona-Based Adoption Playbook

Prompt:

- Create a persona-based adoption playbook for [Customer] to increase usage of [Feature/Product].
- Key personas identified: [List personas, roles, and current adoption levels]
- Pain points by persona: [List known challenges]
- Value proposition by persona: [List benefits most relevant to each]

Please develop:

- Persona-specific messaging and positioning
- Tailored use cases demonstrating immediate value
- Recommended content and resources by persona
- Engagement sequence customized to each persona's workflow
- Metrics to track effectiveness by persona

Training and Enablement Program Design

Prompt:

Design a comprehensive training and enablement program to increase adoption for

[Customer]. Current situation:

- Team size: [Number]
- Skill levels: [Description]
- Current training completed: [Summary]
- Specific adoption goals: [List goals]
- Timeline: [Available timeframe]

Please create:

- A multi-modal training program with diverse learning methods
- Role-specific learning paths
- Microlearning components for ongoing reinforcement
- Knowledge validation mechanisms
- Success measurement approach with feedback loops

In-App Guidance Strategy

Prompt:

Develop an in-app guidance strategy to improve feature adoption for [Customer]. Product areas needing adoption improvement: [List features]

User context:

- Technical sophistication: [Level]
- Time availability: [Typical constraints]
- Known pain points: [List challenges]
- Current guidance in place: [Description]

Please create:

- A contextual guidance framework showing when/where to provide assistance
- Guidance content recommendations (tooltips, walkthroughs, etc.)
- Progressive disclosure approach to avoid overwhelming users
- Success triggers to celebrate progress
- Measurement plan to evaluate guidance effectiveness

Change Management Framework for Adoption

Prompt:

Create a change management framework to support the adoption of [New Feature/Workflow] at [Customer].

Organizational context:

- Company culture: [Description]
- Previous change receptivity: [History]
- Key stakeholders: [List roles]
- Potential resistance points: [Anticipated challenges]
- Timeline: [Implementation schedule]

Please develop:

- A stakeholder impact and influence analysis
- Communication plan with key messages by stakeholder group
- Resistance management strategies
- Success metrics from both technical and human perspectives
- Sustainability measures to ensure long-term adoption

6. Data Visualization & Analytics

| Tip: Data visualizations are most effective when they drive specific actions. Always include clear recommendations based on the insights revealed in your visualizations, not just the data itself. |

Customer Health Visualization

Prompt:

Create an interactive ternary scatter plot to visualize customer health from CSV data containing the following columns:

- Company Name: String (account identifier)
- Days to Renewal: Integer
- Product Adoption Score: Float (0-1 scale)
- CSM-led Calls (90 days): Integer
- Days Since Last Connected: Integer
- Highest Edition Tier: String

Calculate the following scores for each account:

- Relationship Strength Score = (CSM-led Calls / 4), capped at 1
- Renewal Proximity Score:
 - If Days to Renewal > 180: Score = 0
 - If Days to Renewal ≤ 180: Score = 1 - (Days to Renewal / 180)
- Product Adoption Score: Use directly from CSV

Normalize these three scores (Proximity, Adoption, Relationship) so they sum to 1 for ternary plotting.

Create a ternary plot with:

- Top vertex: Renewal Proximity/Urgency
- Bottom-left vertex: Product Adoption
- Bottom-right vertex: Relationship Strength

Color-code each account point based on original scores:

- Green: Product Adoption ≥ 0.6 AND Relationship Strength ≥ 0.6
- Red: Product Adoption < 0.4 OR Relationship Strength < 0.4
- Yellow: All other cases

Add three strategic zones with semi-transparent fills:

- Danger Zone (reddish): Top vertex area focused on Renewal Proximity
- Safe Zone (greenish): Bottom-left area focused on Product Adoption
- Growth Zone (bluish): Bottom-right area focused on Relationship Strength

Include hover functionality showing:

- Company Name
- Normalized scores (as percentages)
- Original scores
- Days to Renewal
- CSM-led Calls
- Edition Tier

Label each point with the company name, with small font size for readability.

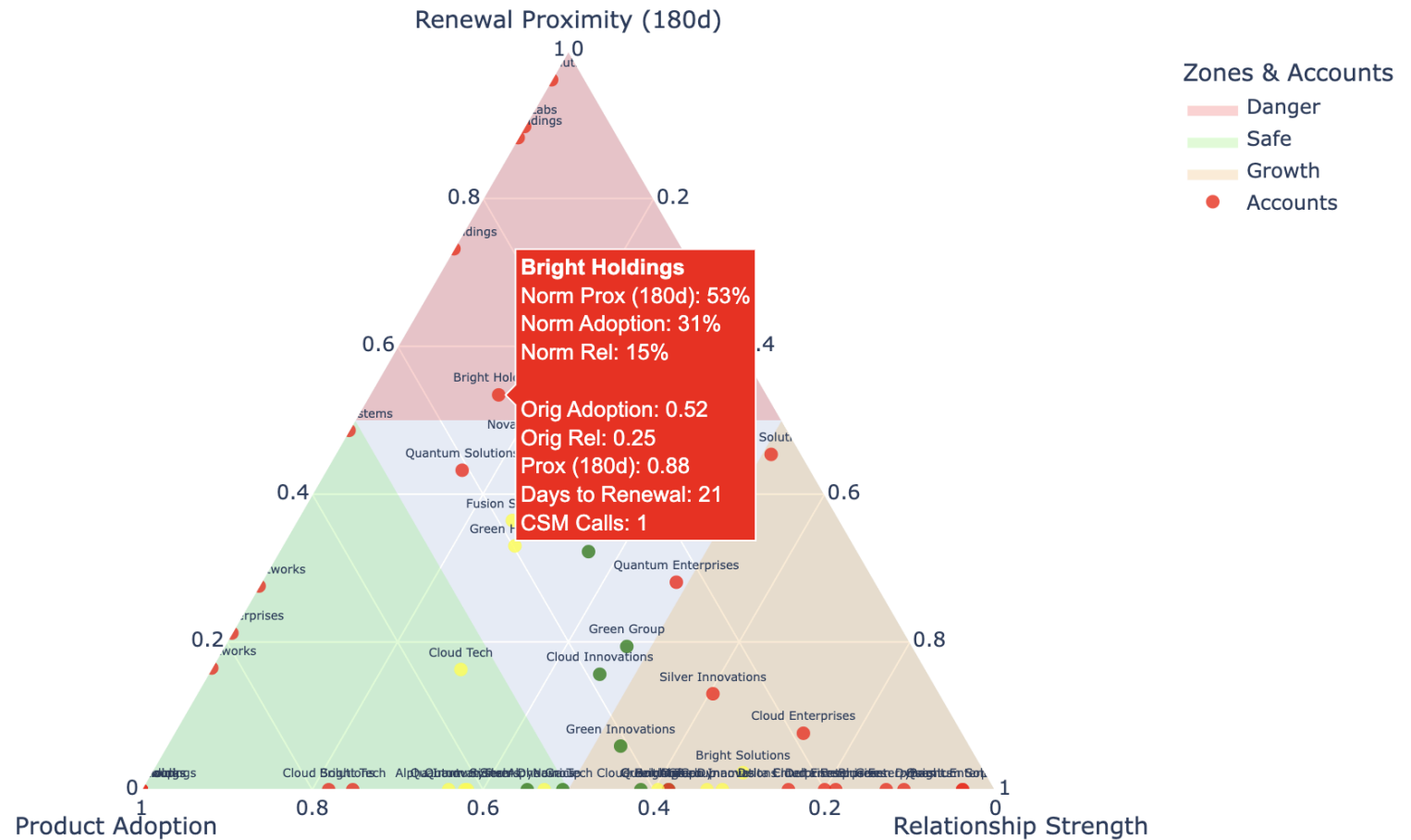
The visualization should be professional, with clear axis labels, titles, and a legend explaining the color coding and zones. Expected output is HTML file

| Warning: The ternary chart uses normalized scores to position accounts visually; these always sum to 1. But risk and opportunity should be judged using the original, unnormalized values. An account near the center of the chart might still be at high risk if its adoption or relationship score is low in real terms. |

Sample Output:



Customer Account Health (180-Day Renewal Window)



The visualization shows an interactive ternary plot with three key dimensions of customer health: Renewal Proximity (top vertex), Product Adoption (bottom-left vertex), and Relationship Strength (bottom-right vertex).

The plot includes:

Strategic zones: Danger Zone (red area near top) indicating customers requiring immediate attention, Safe Zone (green area near bottom-left) showing customers with strong product adoption, and Growth Zone (blue area near bottom-right) highlighting customers with strong relationships that can be expanded.

Color-coded customer points (red, yellow, green) based on health scores, with hover functionality displaying detailed metrics.

Customer data points like Bright Holding positioned in the Danger Zone with high renewal proximity (88%), moderate product adoption (52%), and low relationship strength (25%), clearly indicating a risk requiring immediate action to establish recurring touch points.

Customer Success Metrics Dashboard Design

Prompt:

Design a comprehensive Customer Success metrics dashboard that helps us monitor customer health and team performance.

- Current metrics tracked: [List current metrics]
- Organizational priorities: [List strategic goals]
- Key stakeholders: [List who will use dashboard]

Please recommend:

- Essential metrics to track (leading and lagging indicators)
- Logical grouping of metrics by category
- Visualization recommendations for each metric
- Alert thresholds for proactive intervention

- Reporting cadence for different metric types
- Implementation approach with data sources

Usage Analysis and Segmentation

Prompt:

Analyze our customer usage data to identify meaningful segments for targeted engagement strategies.

- Usage data available: [List metrics available]
- Customer attributes: [List demographic/firmographic data]
- Current segmentation approach: [If any exists]

Please provide:

- Recommended segmentation dimensions based on usage patterns
- Cluster analysis of similar usage behaviors
- Segment-specific engagement recommendations
- Product development insights based on segment needs
- Implementation approach for operationalizing these segments

7. Prompt Exercise for Newbies

Want to build your prompt engineering skills but not sure where to start? This exercise will guide you through the iterative process of developing an effective prompt specifically for Customer Success use cases.

Exercise: Iterative Customer Health Classification

Step 1: Start Small

Prompt v1: "You are an AI assistant. Analyze this customer health data: [health data]."

This baseline prompt lacks specificity and doesn't provide clear instructions for the output format.

Step 2: Analyze & Refine

Note that the prompt doesn't specify the expertise required, the expected output format, or what factors to consider. Identify that CSMs need specific risk categories and actionable recommendations.

Step 3: Improve Prompt

Prompt v2: "You are a Customer Success expert. Classify this customer's health as Green, Yellow, or Red based on these metrics: User Activity: [data], Support Tickets: [data], NPS Score: [data]. Explain your reasoning."

This adds specific classification categories and data points to consider.

Step 4: Add Structure & Context

Prompt v3: "You are a Customer Success analyst with expertise in identifying renewal risk. Review the following customer health data:

- User Activity: [specific usage metrics]
- Support Tickets: [number and severity]
- NPS Score: [score]
- Last Executive Engagement: [date]

Classify this customer's health as Green (healthy), Yellow (at-risk), or Red (critical) and provide:

- Primary risk factors contributing to this classification
- 2-3 specific, actionable recommendations to improve health
- Suggested follow-up timeline based on risk level"

Step 5: Test & Iterate

- Test on 5 different customer datasets
- Note if certain metrics are weighted inappropriately or if recommendations lack specificity
- Add more context about your product and typical customer behaviors
- Aim for $\geq 90\%$ accuracy compared to expert CSM assessment

| Tip: For any prompt engineering exercise, plan to go through at least 3-5 iterations before finding an optimal prompt. Resist the temptation to use your first draft in real scenarios. |

The Final Result:

Prompt v4 (Optimized):

You are a senior Customer Success analyst with 10+ years of experience in SaaS retention strategies. Analyze the following customer health data for [Company Name], a [size] company in the [industry] sector using our [product] for [use case]:

Customer Profile:

- Contract Value: [amount]
- Renewal Date: [date] (Days remaining: [number])
- Customer Since: [date]

Health Indicators:

- User Activity: [active users]/[total licenses], [login frequency] logins per [timeframe] Feature Adoption: [percentage] of key features used regularly
- Support Tickets: [number] in past 30 days ([severity breakdown])
- NPS/CSAT: [score] ([trend])
- Last Executive Engagement: [date] ([sentiment])

Based on this information:

1. Classify this customer's health as:

- GREEN: Healthy, on track for renewal
- YELLOW: At-risk, requiring attention
- RED: Critical, immediate intervention needed

2. Provide a data-driven justification for this classification, identifying the 2-3 most significant factors influencing their health status.
3. Recommend 3 specific, actionable interventions prioritized by potential impact. For each intervention, include:
 - The specific action to take
 - Expected outcome
 - Suggested timeframe
 - Owner (CSM, Support, Product, etc.)
4. Suggest an appropriate engagement cadence based on their risk level.

This prompt evolution demonstrates how adding specificity, structure, and context transforms a basic request into a powerful analytical tool that delivers consistent, actionable insights for Customer Success Managers.

| Warning: Even the most refined prompts may need adjustments for different customer segments. Consider creating segment-specific versions for enterprise vs. SMB customers or different industries. |

8. Best Practices for Prompt Engineering in CSM

| Warning: Remember that AI responses should always be reviewed before sharing with customers or stakeholders. While AI can generate impressive content, it may occasionally provide inaccurate information or miss important context that only you, as the CSM, would know. |

1. Clarity and Specificity
 - Be precise about the output you want
 - Include relevant context and constraints

- Specify format, tone, and length requirements

2. Iteration and Refinement

- Start with a basic prompt and refine based on results
- Keep a library of successful prompts to build upon
- Test variations to see what produces the best output

| Tip: Create a shared repository where your CS team can contribute successful prompts. This collaborative approach accelerates the learning curve for all team members and helps identify which prompt structures work best for your specific product and customer base. |

3. Contextual Awareness

- Include customer-specific information where relevant
- Provide industry context when necessary
- Update prompts as customer situations evolve

4. Ethical Considerations

- Ensure prompts don't encourage biased or inappropriate responses
- Be transparent with customers about AI usage when appropriate
- Maintain confidentiality and data security

5. Integration with Human Expertise

- Use AI as a complement to, not replacement for, human judgment
- Review and validate AI-generated content before customer-facing use
- Combine AI efficiency with human empathy for best results

9. Conclusion

Prompt engineering represents a significant opportunity for Customer Success teams to scale their impact, work more efficiently, and deliver consistent value to customers. By thoughtfully designing prompts that address specific CSM challenges—from workload optimization to expansion and retention—teams can leverage AI tools to handle routine tasks while focusing human expertise on strategic relationship building.

The prompts in this guide serve as starting points that should be customized to your specific customer base, product, and organizational context. As you experiment with these prompts, you'll develop an intuitive understanding of what works best in different situations.

| [Tip: Start small with 1-2 prompts that address your biggest pain points. Once you've seen success, gradually expand your prompt library to cover more use cases. This iterative approach will help build confidence and skill with prompt engineering.](#) |

Remember that the most successful Customer Success organizations will be those that thoughtfully blend human and artificial intelligence, using each for what they do best. Prompt engineering is not about replacing CSMs but about making them more effective by automating the mundane so they can focus on meaningful customer interactions. As AI capabilities continue to evolve, so too will the potential applications in Customer Success. Stay curious, experiment regularly, and share successes with your team to collectively advance your prompt engineering skills and deliver exceptional customer outcomes at scale.