

Role-Playing Exercises: CSM Advocacy Scenarios

These role-playing exercises are designed to help learners practice advocating for their customers while balancing internal priorities and company goals. Each scenario presents a realistic situation for learners to navigate as a CSM.

Scenario 1: Advocating for Product Enhancements

****Situation:****

A customer repeatedly requests a new feature that would significantly improve their workflow. The feature is not currently on the product roadmap.

****Role-Playing Objective:****

As the CSM, practice:

- Gathering feedback from the customer to build a strong case for the feature.
- Communicating the importance of this feature to the Product team.
- Keeping the customer informed and managing their expectations.

****Discussion Questions:****

- How will you present the customer's case to the Product team?
- What alternative solutions can you offer the customer in the meantime?

Scenario 2: Resolving Misalignment Between Sales Promises and Product Capabilities

****Situation:****

A customer is unhappy because the solution they purchased doesn't fully meet their needs, based on expectations set during the sales process.

****Role-Playing Objective:****

As the CSM, practice:

- Acknowledging the customer's frustration and rebuilding trust.
- Collaborating with Sales and internal teams to address the gap.
- Proposing a tailored solution to meet the customer's needs.

****Discussion Questions:****

- How will you handle the customer's dissatisfaction during the initial conversation?
- What actions can you take to avoid similar issues in the future?

Scenario 3: Protecting Customers During Escalations

****Situation:****

A major product bug has caused downtime for a customer, disrupting their operations.

****Role-Playing Objective:****

As the CSM, practice:

- Coordinating with Support and Engineering teams to prioritize resolution.
- Providing clear, regular updates to the customer.
- Offering additional support or resources to mitigate the impact.

****Discussion Questions:****

- How will you reassure the customer while waiting for a resolution?
- What long-term actions will you take to restore the customer's trust?

Scenario 4: Championing Customer Goals in Strategic Discussions

****Situation:****

During a renewal negotiation, the customer expresses doubts about continuing with the product, citing unclear ROI.

****Role-Playing Objective:****

As the CSM, practice:

- Using data to demonstrate the value delivered by the product.
- Aligning renewal discussions with the customer's upcoming goals.
- Addressing concerns and proposing strategies for further success.

****Discussion Questions:****

- What data points will you use to demonstrate ROI?
- How will you align the customer's goals with the renewal proposal?

Scenario 5: Addressing Compliance or Legal Concerns

****Situation:****

A customer raises concerns about data privacy compliance, especially with recent changes in their industry regulations.

****Role-Playing Objective:****

As the CSM, practice:

- Collaborating with the Legal and Compliance teams to address the customer's concerns.
- Providing clear, actionable information to reassure the customer.
- Connecting the customer with internal experts if needed.

****Discussion Questions:****

- How will you ensure the customer feels their concerns are taken seriously?
- What resources or processes will you offer to provide reassurance?