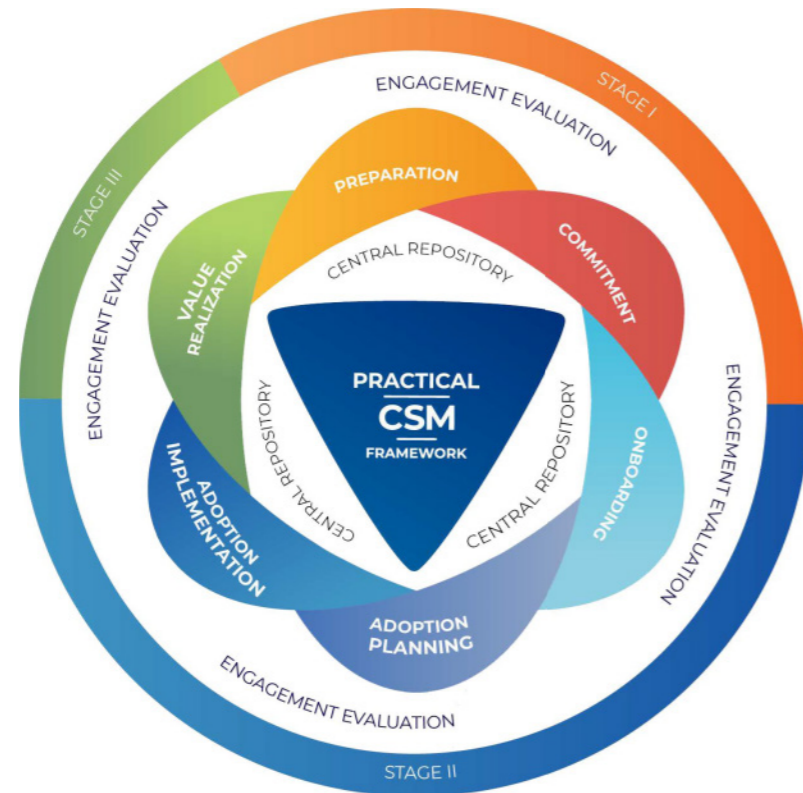# Certification Syllabus

making customer success simple

The Practical CSM Academy Certification Syllabus

The Certification Syllabus for the Practical CSM Academy is based upon two core foundations: Framework Based Learning and Real World Guidance:

Framework Based Learning

All four levels of the Practical CSM Academy's certification program are based on the Practical CSM Framework – a tried and tested best practice model for the successful implementation of customer success management.

The customer engagement is divided into seven phases, from "Preparation" to "Engagement Evaluation". Each phase provides step-by-step best practice guidance in terms of both what to do at this stage in the customer journey and how to do it in a way that ensures the highest possible levels of both productivity and quality.

Real World Guidance

To determine what specific items should be taught and examined and how much emphasis to place on each item is actually quite a formidable task to accomplish.

In order to help makes these all-important decisions, the Practical CSM Academy has created a panel of independent Customer Success professional experts called the "Certification Oversight Committee". This panel provides guidance and steering for how the syllabus is developed and adapted over time.

Ten Modules within Four Certification Levels

The Certification program contains four certification levels – Specialist, Consultant, Expert and finally Certified CSM Professional (CCSMP). Members undergo the training inside each of ten modules before progressing to the final exam.

Certification Examination

Level 4
certification examination

Level 3
Adoption Planning, Adoption Implementation, Value Realization, Engagement Evaluation, Putting it all Together

← Adoption Planning, Adoption Implementation, Value Realization, Engagement Evaluation, Putting it All Together

Level 2
Preparation, Commitment and Onboarding

← Preparation, Commitment, Onboarding

Level 1
Customer Success Fundamentals and Business Fundamentals

← Customer Success Fundamentals, Business Fundamentals

New Entrant
no certification requirements

start point

Syllabus for Module 1: Customer Success Fundamentals

- What is Customer Success and Why is it Important?
- What is Customer Success Management?
- Why Invest in Customer Success Management?
- How Does Customer Success Work?
- The Role of the Customer Success Manager
- Understanding Outcomes and KPIs
- Treating your Customer as your Business Partner
- Is Customer Success the same as Customer Happiness?
- Why is Customer Success Management becoming More Important?
- How does Customer Success Management help to Realize Business Value?
- Where do CSMs fit within the Wider Organizational Structure?
- Customer Renewals and Retention/Churn
- Customer Success in Different Business Types
- Land and Expand Sales Motions

- Customer Lifetime Value (CLV)
- Customer Advocacy
- What is your organization's customer success strategy?
- What is your role in helping to fulfil your organization's customer success strategy?
- What assets and resources are available to help you?
- How will you plan and manage your time?
- Internal evangelization of customer success management
- The RAPAE Task Model – a way to categorize CSM activities
- Research, Analysis and Planning as Enablers of Action
- Understanding the Critical Path
- Introducing The Practical CSM Framework
- How should the Practical CSM Framework be used?
- Getting in Front of Senior Management and 'C' Level Customer Stakeholders
- The 14 Tenets of Customer Success
- Reflecting on your own knowledge, skills and experience

MODULE 1

SUCCESSFUL COMPLETION

Customer Success Fundamentals

PRACTICAL CSM ACADEMY

LEVEL 1

PROFESSIONAL ACHIEVEMENT

CCSMP Level 1

PRACTICAL CSM ACADEMY

Module One provides a foundational understanding of the basics of Customer Success Management. It defines what customer success is, explains its value to both customers and suppliers, and explains the core components of the CSM's role.

CSM

Syllabus for Module 2: Business Fundamentals

- What is meant by the term "business fundamentals"

- Why an understanding of business fundamentals is essential to many (if not all) customer success managers

- Why businesses exist and how they fulfil this purpose

- How value is generated for the business's owners

- Who (besides owners) businesses generate value for, and why this is important

- How businesses calculate both their expenditure and their profits in order to generate an "annual return" statement

- Understanding customer segmentation

- Understanding value propositions

- How customer segmentation relates to value propositions

- How businesses are structured and managed

- Management Levels and Decision Making

- A review of a typical company org chart

- What is meant by the term "business capability"

- How the concept of business capabilities can be used to define and understand everything that a business does

- Why businesses are constantly needing to change, with examples to illustrate how this works in real life

- Vision and strategy formulation and how it occurs in a modern business

- An overview of the BMM (Business Motivation Model), including discussion on each component of the BMM and how they come together to create meaningful change within a business

MODULE 2

LEVEL 1

SUCCESSFUL COMPLETION

Business Fundamentals

PRACTICAL CSM ACADEMY

PROFESSIONAL ACHIEVEMENT

CCSMP Level 1

PRACTICAL CSM ACADEMY

Module Two delivers a grounding in the fundamentals of how businesses work and how they are managed. This is essential knowledge for CSMs who need to be able to empathize with and help solve the problems of their customers' key business decision makers.

Syllabus for Module 3: Preparation

MODULE 3

LEVEL 2

Module Three focuses specifically on what CSMs should do to prepare themselves before they engage with a new customer. This all important research and planning phase is a part of what enables high quality results later down the line.

- What is PCSMF Phase 1: Preparation all about?
- Defining the customer engagement
- Accessing information
- Internal handover
- Customer information
- Solution information
- Initiative information and customer outcome requirements
- CSM outcome requirements
- Stakeholder information
- Third parties and project status
- Managing information gaps
- Formulating an engagement strategy and roadmap
- Tools for PCSMF Phase 1: Preparation
- Providing a Joined Up Customer Experience
- Sources for Researching Customer Information

- Selecting & Validating Customer Information
- Information to Research
- The Customer Research Checklist Tool: Overview
- The Customer Research Checklist Tool: Customer Tab
- The Customer Research Checklist Tool: Solution Tab
- The Customer Research Checklist Tool: Initiative Tab
- The Customer Research Checklist Tool: Stakeholders Tab
- The Customer Research Checklist Tool: Progress Tab
- The Customer Research Checklist Tool: Utilization
- Engagement Planning & Engagement Strategy Tool
- Engagement Strategy: Priority, Complexity & Maturity
- Engagement Strategy: Outcomes, Milestones & Measurements
- Engagement Strategy: Activities & Roadmap

Syllabus for Module 4: Commitment

MODULE 4

SUCCESSFUL COMPLETION
Practical CSM Framework Phase 2:
Commitment
PRACTICAL CSM ACADEMY

LEVEL 2

PROFESSIONAL ACHIEVEMENT
CCSMP
Level 2
PRACTICAL CSM ACADEMY

Module Four explains key aspects of relationship management, the validation of information, educating key stakeholders on the concepts and value of customer success management, and negotiating and agreeing a success roadmap.

- What is PCSMF Phase 2: Commitment all about?
- The customer commitment process
- Communicating with the customer
- The initial customer meeting
- Developing a stakeholder management strategy
- Tools for PCSMF Phase 2: Commitment
- Working With the Customer: Key Concepts

- Working With the Customer: Credibility & Rapport
- The Customer Success Proposal
- Meetings Best Practice
- Consultative Questioning
- Using the RACI Matrix
- Using the Stakeholder Management Matrix
- Creating a Stakeholder Management Plan
- Completing the Customer Success Proposal

Syllabus for Module 5: Onboarding

MODULE 5

SUCCESSFUL COMPLETION

Practical CSM Framework Phase 3: Onboarding

PRACTICAL CSM ACADEMY

LEVEL 2

PROFESSIONAL ACHIEVEMENT

CCSMP Level 2

PRACTICAL CSM ACADEMY

Module Five defines how the CSM delivers a comprehensive and high quality onboarding experience to the newly engaged customer. This module identifies what should be included within an onboarding program and explains how to deliver it.

- What is PCSMF Phase 3: Onboarding all about?
- Understanding onboarding
- Generic and customized onboarding models
- Onboarding as a professional service
- Tools for PCSMF Phase 3: Onboarding
- What is "Onboarding"?
- Why is Onboarding Important?
- Onboarding Vs Adoption Vs Value Realization
- Selecting an Onboarding Service Model
- Using a Generic Onboarding Service Model

- Using a Customized Onboarding Service Model
- Onboarding Services at Your Company
- Four Influencers of Onboarding
- The Customer Onboarding Scoring Matrix
- Onboarding Discussions with the Customer
- Customized Onboarding and Full Adoption Services
- Three Choices for Onboarding: Generic, Customized or Fully Bespoke
- Information for Generic Onboarding
- Information for Customized Onboarding
- Managing the Onboarding Process
- Developing the Right Onboarding Services

Syllabus for Module 6: Adoption Planning

- What is PCSMF Phase 4: Adoption Planning all about?
- Understanding Impacted Users
- Research Techniques
- CSM Involvement in Adoption Research
- Working with multiple stakeholders
- Step 1: Determine Adoption Requirements
- Step 2: Identify Process Changes
- Step 3: Define Impacted Groups (IGs)
- Step 4: Document Practical Considerations
- Step 5: Determine Communication, Training and Support Requirements
- Step 6: Capture Adoption Barriers and Risks
- Step 7: Create Outline Adoption Plan
- Step 8: Create Adoption Proposal and Gain Acceptance
- Step 9: Complete Full Adoption Plan and Publish Adoption Roadmap
- Activities and Outputs for PCSMF Phase 4: Adoption Planning

- Defining Adoption & the Importance of Adoption
- Adoption Pilots and Phases
- Adoption and Change Management
- The ADKAR Change Management Model
- Knowledge Skills & Attitude (KSA) Concepts
- Directly & Indirectly Impacted Users
- Research Techniques: The Workshop
- Getting the Adoption Requirements Agreed
- The Role of the CSM in Adoption Planning
- The Adoption Planning Process
- Adoption Planning Tools: Existing Tools
- Adoption Planning Tools: General Adoption Requirements
- Adoption Planning Tools: Capabilities & Processes
- Adoption Planning Tools: Impacted Groups
- Adoption Planning Tools: Adoption Activities
- Adoption Planning Tools: Practical Considerations
- Adoption Planning Tools: Adoption Barriers
- Adoption Planning Tools: Adoption Risks

MODULE 6   **LEVEL 3**

Module Six is the first of two modules that concentrates on the adoption process. In this module the focus is on adoption planning, including how to research and analyze business requirements, business capabilities and impacted users.

Syllabus for Module 7: Adoption Implementation

- What is PCSMF Phase 5: Adoption Implementation all about?
- Project Management and the Role of the CSM
- Benefits of a Multi-Phased Adoption Program
- Preparing for Project Kick-Off
- Managing People
- Managing Tasks
- Measuring and Reporting
- Handling Problems
- Dealing with Change
- Completing the Project
- Tools for PCSMF Phase 5: Adoption Implementation
- Activities and Outputs for PCSMF Phase 5: Adoption Implementation
- Adoption Implementation Roles
- Project Management Principles & Best Practices

- Preparing for Project Kick-Off
- Managing End User Conflict
- Adoption Task Management
- Work Breakdown Structure (WBS)
- Understanding The Critical Path Method (CPM)
- Using The Critical Path Method (CPM)
- Applying WBS and CPM to an Adoption Initiative
- Adoption Activity Measurement & Reporting Overview
- Targets, Baselines and Milestones
- Adoption Reporting
- Handling Problems During Adoption
- Problem Handling Best Practice Steps 1 to 6
- Adoption Project Completion
- Readiness for Value Realization

MODULE 7

LEVEL 3

Module Seven completes the discussion on adoption by explaining how to use project management and change management best practices to help the customer implement the adoption plan in an efficient and effective manner.

Syllabus for Module 8: Value Realization

- What is PCSMF Phase 6: Value Realization all about?

- Comparative Duration of the Value Realization Phase

- Balancing the Needs of Multiple Customers

- Helping Customers to Realize Their Value

- Maximizing Renewals

- Upselling and Crosselling

- Feedback and Advocacy

- Has Everything Been Done?

- Tools for Practical CSM Framework Phase 6: Value Realization

- Activities and Outputs for Practical CSM Framework Phase 6: Value Realization

- Promised and Anticipated Value

- Determining the Value Generated ng

- Selecting Key Performance Indicators (KPIs)

- Problems With Value Realization

- Where Does Value Come From?

- Knowledge is Power

- Progress Towards Outcome Attainment

- Steps in the Performance Management Process

- Defining the Outcome Requirements and KPIs

- If Stakeholders Don't Know What They Want...

- If Stakeholders Don't Agree Between Them as to What They Want...

- Converting Indirect Value into Direct (Financial) Value

- Working to the Customer's Agenda

- Suppliers Need Customers to Remain as Customers

- Realizing Value Vs Attaining Value

- What is the Customer's Agenda?

- Problem Solving: What if the Value is Not Being Attained?

- What is Root Cause Analysis?

- Root Cause Analysis Steps

- Five "Why?"s and the Cause and Effect Diagram

- The Role of the CSM in Sales Activities

- Using Consultative Questioning to Determine Outcome & KPI Requirements

- Reporting on Progress Towards Outcome Attainment

- Reporting on the Financial Returns from the Investment

MODULE 8

SUCCESSFUL COMPLETION

Practical CSM Framework Phase 6:
Value Realization

PRACTICAL CSM ACADEMY

LEVEL 3

PROFESSIONAL ACHIEVEMENT

CCSMP
Level 3

PRACTICAL CSM ACADEMY

Module Eight is arguably the most important module of all as this focuses on what the CSM needs to do to ensure that the customer not just attains but also realizes the maximum value from the implementation of the solution.

Syllabus for Module 9: Engagement Evaluation

- What is PCSMF Phase 7: Engagement Evaluation all about?
- The importance of reviewing CSM activity
- Increasing the customer success management knowledge base
- Updating personal and team best practices
- Templating common process steps
- Improving your own CSM practice
- Working with quarterly activity targets
- Improving your Team's practice
- Celebration of Success
- Activities and Outputs for Practical CSM Framework Phase 7: Engagement Evaluation
- Overview of the Executive Business Review (EBR)

- Cadence & Attendees the Executive Business Review
- Structure of an Executive Business Review
- Executive Business Review Best Practice
- Getting Senior Stakeholders to Attend
- What Value Has the Customer Received From this Engagement?
- What Value Has the Supplier Received From this Engagement?
- What Value Has the CSM Received From this Engagement?
- Using the Engagement Evaluation Tool
- Using the Personal Evaluation Tool
- The Customer Success Roadmap
- Example Customer Success Roadmap

MODULE 9   **LEVEL 3**

SUCCESSFUL COMPLETION

Practical CSM Framework Phase 7:
Engagement Evaluation

PRACTICAL CSM ACADEMY

PROFESSIONAL ACHIEVEMENT

CCSMP
Level 3

PRACTICAL CSM ACADEMY

Module Nine explains the importance of evaluating progress at every stage of the journey, and describes how to document best practice for efficient re-use and how to identify areas for improvement of the service for future engagements.

Syllabus for Module 10: Putting it All Together

- Who Benefits from Customer Success Management?
- Common CSM Traps and Pitfalls
- Customer Success is the Jewel in the Customer Experience Crown
- The Future of Customer Success
- Glossary of Essential Customer Success Management Terminology
- The Customer Success Knowledgebase
- Using a Best Practice Framework
- Using Tools & Templates
- Customer Success Management as a Sales Feature
- The Partnering Approach
- The "Shared Risks, Shared Rewards" Model

- Pitfall 1: Doing Too Much for Each Customer
- Pitfall 2: Not Leaving Time for Continual Professional Development (CPD)
- Pitfall 3: Not Understanding Your Own Company's Customer Success Strategy
- Pitfall 4: Focusing on Technical Instead of Business Issues
- Pitfall 5: A Lack of Insight Into Your Customer's Business
- Pitfall 6: Too Much Time Spent Doing Admin
- Pitfall 7: Lack of Best Practice Resources Such as Frameworks, Tools & Templates

MODULE 10 **LEVEL 3**

SUCCESSFUL COMPLETION

Practical CSM Framework
Putting it all Together

PRACTICAL CSM ACADEMY

PROFESSIONAL ACHIEVEMENT

CCSMP
Level 3

PRACTICAL CSM ACADEMY

Module Ten is the final module in the series, and this module puts all seven phases of the Practical CSM Framework together into a single context of an end-to-end customer engagement, and discusses how to improve the CS practice.

Two Final Exams to Gain our Highest Professional Certification

LEVEL 4

Our Certification Levels One, Two and Three each contain respectively two, three and five training modules plus a simple test at the end of each module.

Our Level Four Certification works somewhat differently. For this level there is no further training requirement, instead the candidate is expected to revise the content of all ten of the previous training modules preparatory to taking a final, two part exam.

Both exams are in an "open book" format that are taken online and are timed. Part One comprises 50 simple questions that candidates must answer within 60 minutes. Part Two comprises just eight, more detailed "scenario" based questions for which candidates receive 40 minutes to answer. Part One is designed to test knowledge, and Part Two is designed to test a candidate's abilities to apply that knowledge to real world challenges.

OUTSTANDING PROFESSIONAL ACCOMPLISHMENT

Certified CSM Professional
Level 4

PRACTICAL CSM
ACADEMY

Certification Oversight Committee

The Certified CSM Professional syllabus is based on the Practical CSM Framework, and it is overseen by our Certification Oversight Committee of twelve independent Customer Success profession leaders and subject matter experts, plus our own Founder and CEO Rick Adams.

The training content for all ten training modules as well as all of the questions for the tests at the end of each module, and all of the questions for both parts of the final, two part exam for attaining CCSMP status are all based on the syllabus.

The committee's role is to review the syllabus on a regular basis and agree additions and amendments to ensure it always stays fresh, up to date and relevant to the current needs of the CS profession. Changes to the syllabus are made by a majority decision within the committee, and are then passed through to the content development team. The content development team then make the appropriate changes to the content (including training materials and test/exam questions), and these are then published in due course for members to access.

Rick Adams
Founder & CEO PracticalCSM.com

practicalcsm.com/oversight-committee

Jared Raftery
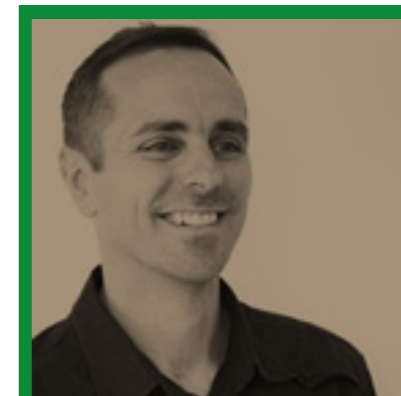Director, Cloud & Managed Services Juniper Networks

Maranda Dziekonski
VP Customer Success Swiftly Inc

Irit Eizips
Chief Customer Officer & CEO CSM Practice

Rav Dhaliwal
Investor & Venture Partner Crane Venture Partners

Alan Fecamp
Director SaaS Recruitment PIE Recruitment

Sarah Bierenbaum
Founder & Principal Sarah B Consulting

Kristi Faltorusso
VP Customer Success InteliShift Technologies LLC

Jeff Sheehan
CX Consultant Independent Practice

Jason Noble
VP Global Customer Success Vinli Inc

Scott Morgan
VP Customer Success Strategy PracticalCSM.com

Peter Armaly
Senior Director CS Strategy Oracle

Heather Thompson
Manager, Customer Success EMEA, HubSpot

The Practical CSM Academy

making customer success simple

practicalcsm.com/academy