

Practical CSM Academy

Making Customer Success Simple

**A Revolution in Customer Success
Training Certification and CPD**





Everything in one place for ALL levels of Customer Success professionals

“The Academy is a very well-organized learning platform, and the content is both easy to understand and enjoyable to use.”

**Tamara Garcia
Ramos, Customer Success Manager,
Bdeo**



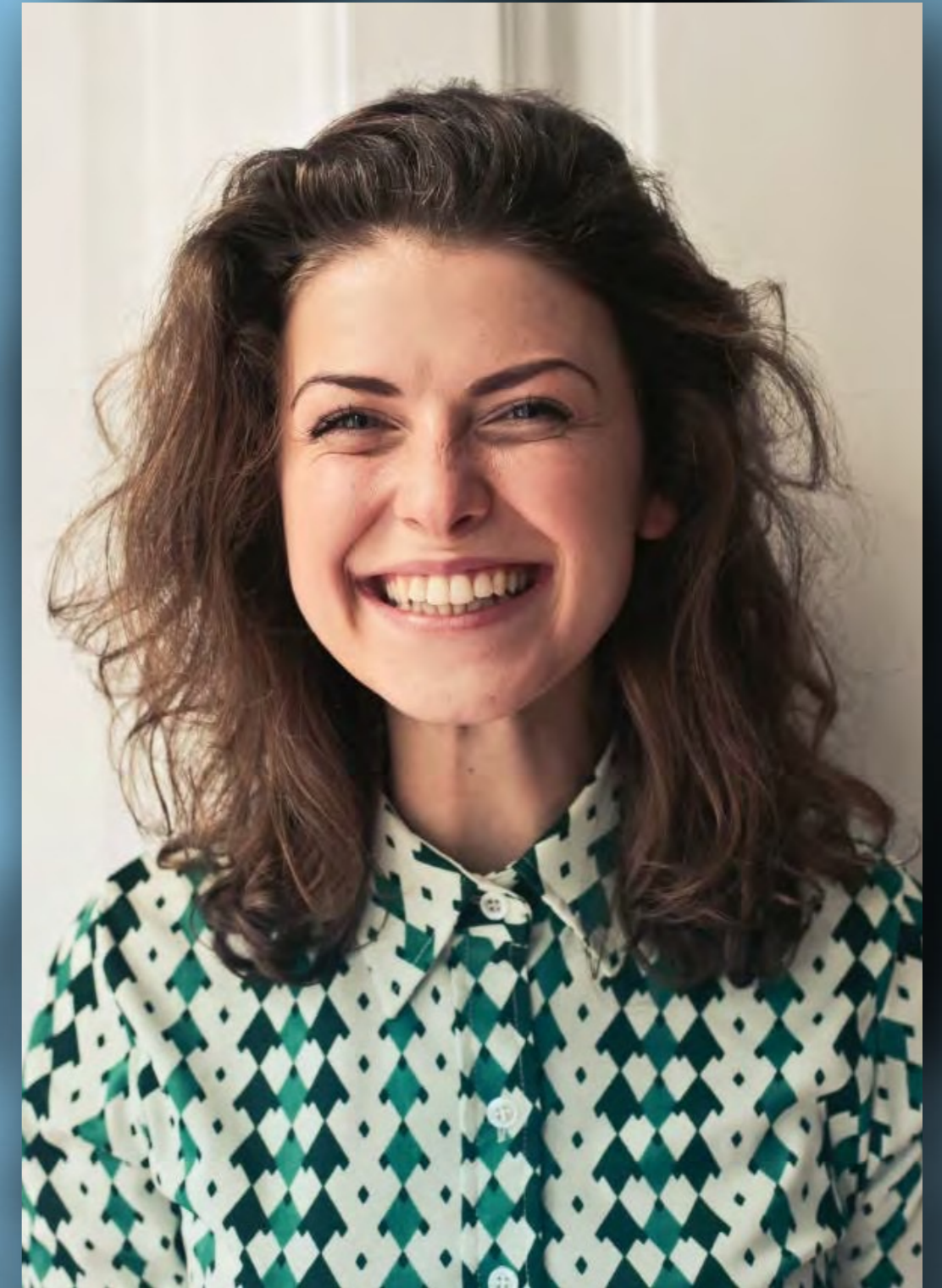
Customer Success Management is a great profession to be in

It may be a hugely rewarding job, but it's also a tough role to perform well. The duties of a Customer Success Manager are very complex in terms of the breadth and the depth of knowledge, skills and experience that every CS professional requires.



Everything you need for the Customer Success profession

- Comprehensive professional certification program
- Online and downloadable self-paced study materials
- Live instructor-led workshops and replays
- Bite-sized “just in time” learning for specific tasks
- Real world scenario-based exercises and fun quizzes
- Downloadable tools, templates and checklists
- Multiple formats-reading, watching and doing
- Content refreshed and added to all the time
- Ask our experts all your CS-related questions
- Catalogued library of CPD assets
- Sophisticated team reporting and management tools
- Help to onboard and adopt our training, and measure your ROI



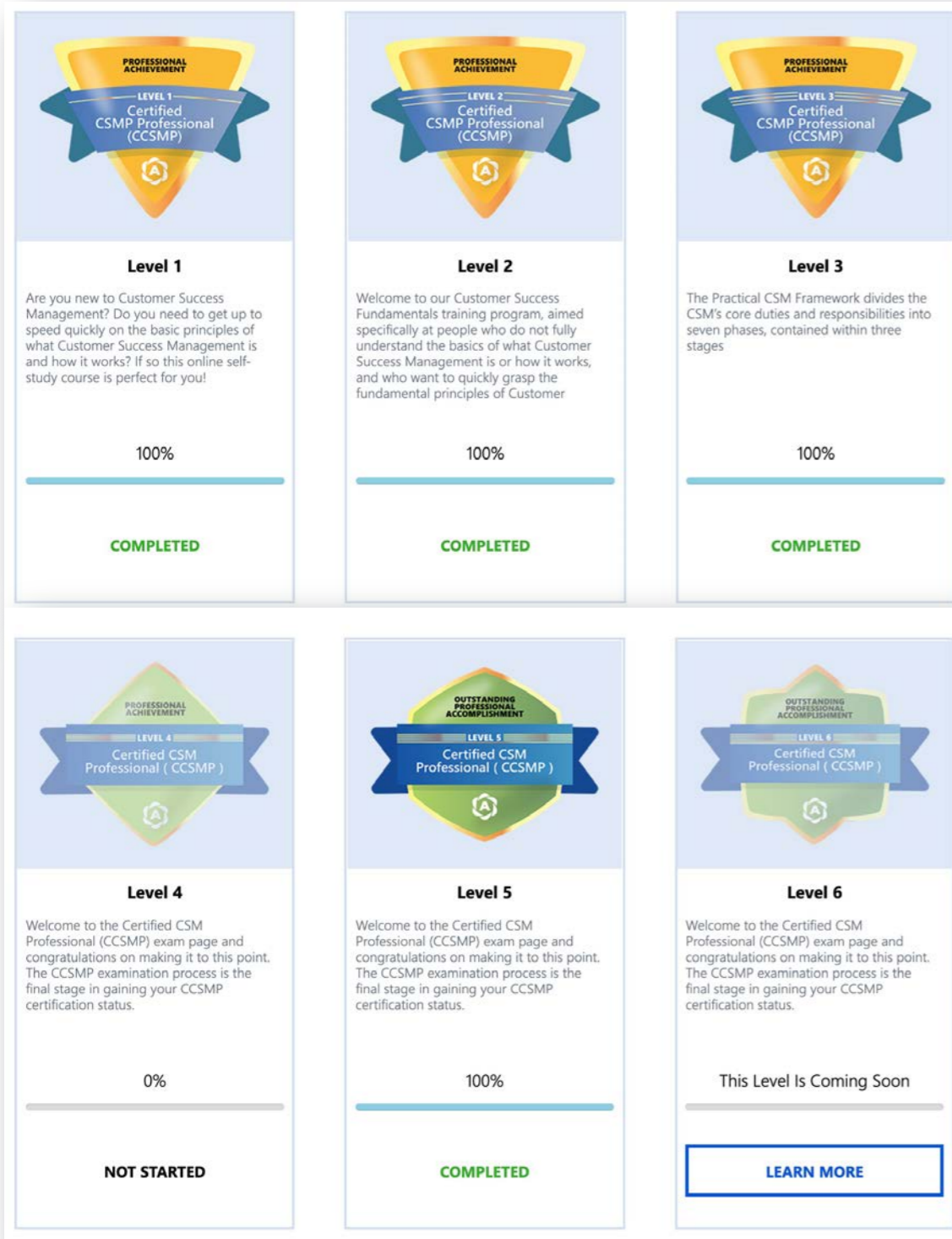
What do you get with Practical CSM Academy?

Progress Dashboard

People learn best when they want to learn.

In addition to providing the right quality and quantity of learning content in a wide range of formats including audio, video, articles, workbooks, exercises, quizzes and downloadable tools, care has been taken to make the portal itself as simple and intuitive to use as possible, and to make the process of learning both an engaging and an enjoyable one.

Best practice human / computer interaction and gamification principles have been employed to enhance the navigation and learning experience of our members throughout the website.



What do you get with Practical CSM Academy?

The screenshot shows a course navigation menu with four levels. Level 2 is selected and highlighted in blue. Under Level 2, there is a 'Certificate' button indicating '100% complete'. The course content is organized into phases and modules. Phase 1 (Preparation) includes modules 3.1 through 3.5. Phase 2 (Commitment) includes modules 4.1 through 4.9. Each module has a green checkmark icon. Below the modules, there are three 'Module 4 Test' entries, each with a 'Statistics' button and a '0% Failed' indicator. Phase 3 (Onboarding) includes a 'Quizzes' section. At the bottom, there is an 'Assessment Level 2' button.

Certification Process

Our **Certified CSM Professional** program is based on the Practical CSM Framework and offers professional-level certification within a structured roadmap of ten interactive, self-paced modules, with a final exam to prove professional competence.

This screenshot shows the navigation for Level 3. It lists ten modules, each with a green checkmark, a blue arrow icon, and lesson/test counts. The modules are: 6. Practical CSM Framework Phase 4: Adoption Planning (11 Lessons | 1 Test), 7. Practical CSM Framework Phase 5: Adoption Implementation (11 Lessons | 1 Test), 8. Practical CSM Framework Phase 6: Value Realization (22 Lessons | 1 Test), 9. Practical CSM Framework Phase 7: Engagement Evaluation (8 Lessons | 1 Test), and 10. Putting It All Together (9 Lessons | 1 Test). At the bottom, there is an 'Assessment Level 3' button.

The video player shows a slide titled 'making customer success simple'. The slide content includes the text 'Reflecting on your own knowledge, skills and experience' and a list of bullet points: 'Think about your own levels of skills, knowledge and experience as they apply to each tenet', 'Determine the gaps in your capabilities', and 'Take proactive action to fill those gaps and become a more rounded and better quality CSM'. A circular logo on the right side of the slide says 'Customer Success Fundamentals'. The video player interface includes a play button, a progress bar at 03:35, and a speaker icon.



What do you get with Practical CSM Academy?



Certification Attainment

At the end of your **Certified CSM Professional** program, you will be awarded the relevant certification for the program you have studied. Your certification lasts for 3 years and can be renewed by continuing to study a minimum level of Continuing Professional Development training content with us each subsequent year.



What do you get with Practical CSM Academy?

CPD Library

We have thousands of bite-sized learning assets including videos, podcasts, articles, checklists, templates and more. Our fully indexed and searchable database allows you to quickly and easily access the precise topics you need.

- ▶ "Automated CS" is not "Lower Quality CS" – Rants & Musings with Rick Adams
- ▶ "Culture Fit" or "Culture Add"?
- ▶ 14 Tenets of Customer Success Part 1 of 5
- ▶ 14 Tenets of Customer Success Part 2 of 5
- ▶ 14 Tenets of Customer Success Part 3 of 5
- ▶ 14 Tenets of Customer Success Part 4 of 5
- ▶ 14 Tenets of Customer Success Part 5 of 5
- ▶ A Customer whose renewal is due this month is not happy with your software – Rants & Musings with Rick Adams
- ▶ A New Approach to Scaling Customer Success – Part 1

Categories

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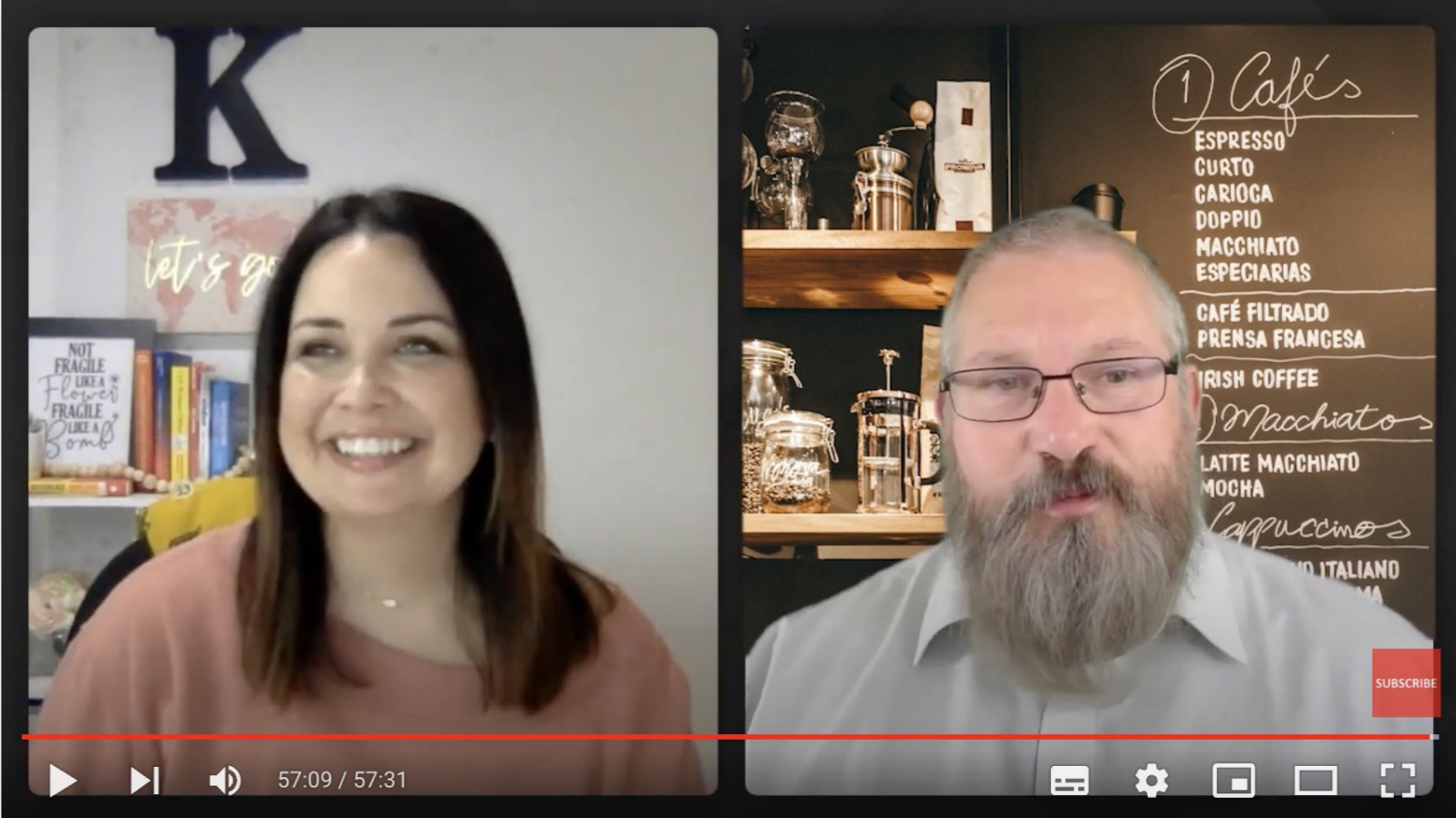
What do you get with Practical CSM Academy?

Workshops

Join us for one or more of our live training events each month that cover a full range of CS-related topics at all levels from beginners to advanced. You can even request a specific topic and we'll do our best to cover it for you in a future event.

The screenshot shows a website interface for Practical CSM Academy. At the top, there is a search bar and a 'Find Events' button. Below this, there are navigation options for 'Today' and 'Upcoming'. The main content area displays a calendar for November 2021 with five events listed:

- TUE 2** November 2 @ 4:00 pm - 5:00 pm GMT
The Practical CSM Framework – Phase 6: Value Realization & Phase 7: Engagement Evaluation
These events are an entire series that cover the Practical CSM Framework over the course of the year. The "Overview" [...]
- TUE 16** November 16 @ 4:30 pm - 5:30 pm GMT
Basic Skills for Customer Success Managers – Emotional Intelligence
Described by more than one attendee as "the best course I have ever attended", this 60 minute overview of the [...]
- WED 17** November 17 @ 4:30 pm - 5:30 pm GMT
Creating a Modern Customer Success Service with Rick and Peter – Reporting & Collaborating
The full title for this brand new, FREE and LIVE twelve-part series for 2021 is Researching, Developing, Implementing & Managing [...]
- WED 17** November 17 @ 5:30 pm - 6:15 pm GMT
Customer Experience Management Field Manual – Part IX: The Generals
Each month Jeff takes you through each core function using excerpts from his new book: Customer Experience Management Field Manual [...]
- THU 18** November 18 @ 4:30 pm - 5:30 pm GMT
Coffee Bar Conversations with Rick Adams – Winning Back a Customer After a Poor Experience with Jim Buscaglio
A series of intimate discussions about the Customer Success profession, featuring the world's leading CS thought leaders in conversation with [...]



What do you get with Practical CSM Academy?

Ask an Expert

Content *

Feel free to ask our Customer Success experts anything you like. We cannot promise we'll know the answer, but our experts are on hand every day of the year to review your questions and provide you with the best answer we can in the shortest time

(Please note that whilst we endeavour to answer all customer success-related questions within 48 hours, we do operate a "fair use" policy and we reserve the right to prioritise our time to meet the needs of all members by slowing down or ceasing to respond to questions if we find ourselves overwhelmed by questions at any stage)

SUBMIT

Successopedia

Find answers to frequently asked questions, look up jargon in our comprehensive glossary of CS-related terminology, and get personalized help on any CS-related topic by sending your questions to our panel of experts.

Glossary of Terminology

Account Manager (AM) -

A person who is assigned to either one or a small number of specific customer accounts, and whose role it is to "manage" those customers, in terms of answering their questions, uncovering sales opportunities and submitting sales proposals. The Account Manager's role is often likened to the CSM's role, but the emphasis (and remuneration) tends to be based more on new sales revenues and less on renewals revenues and adoption levels from existing product/service sales.

Activity +

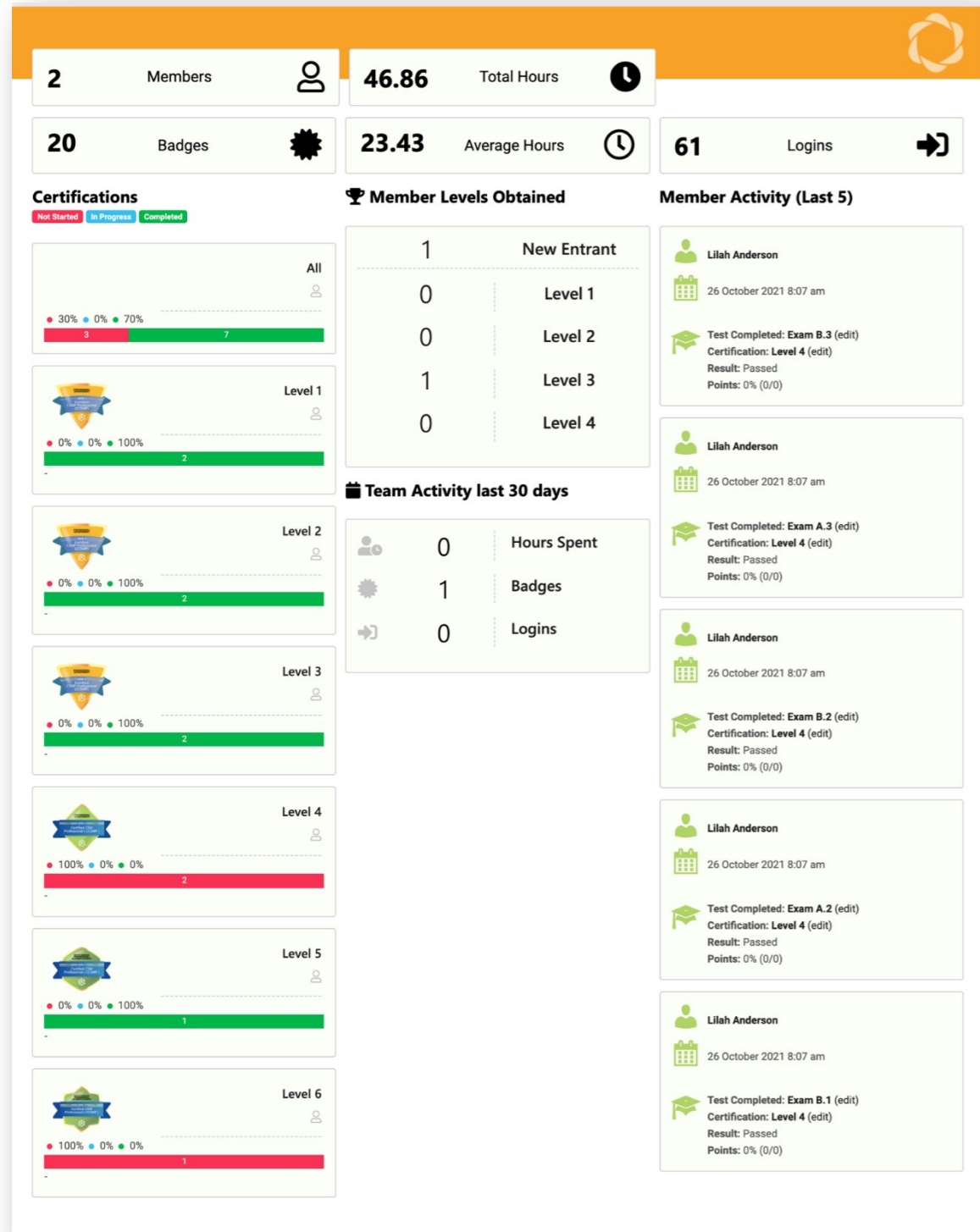
ADKAR +

Adoption +

Adoption Barrier +



What do you get with Practical CSM Academy?

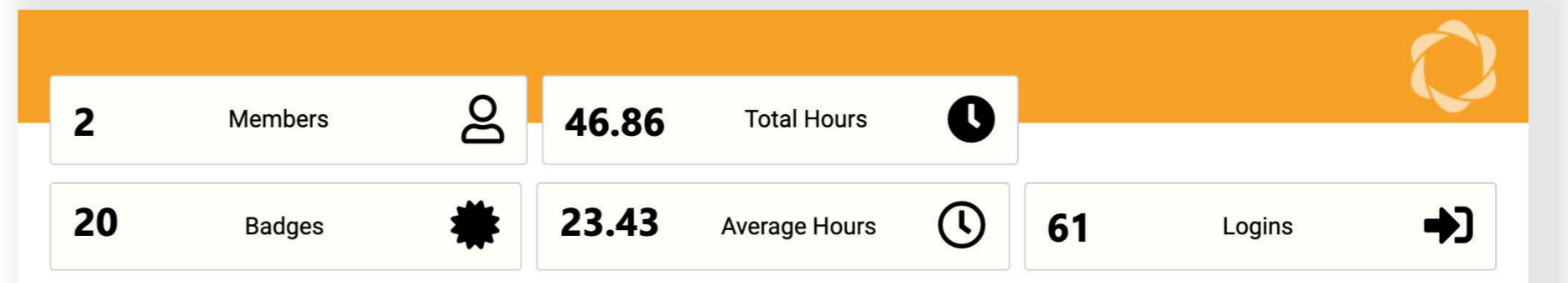


Team Management

Team Activity Overview

Learn at a glance what your entire team is up to on the Academy platform. Data includes the number of users, number of logins, number of hours spent in training and attainment of awards including Modules, Levels, Badges and Certifications.

Overview




What do you get with Practical CSM Academy?



Team Management

Individual User Management

Drill down to learn more about any individual team member's activity. Details include progress to date, attainment of awards including Modules, Levels, Badges and Certifications, plus detailed history of tests and exams including pass and failure scores and which questions they got wrong.

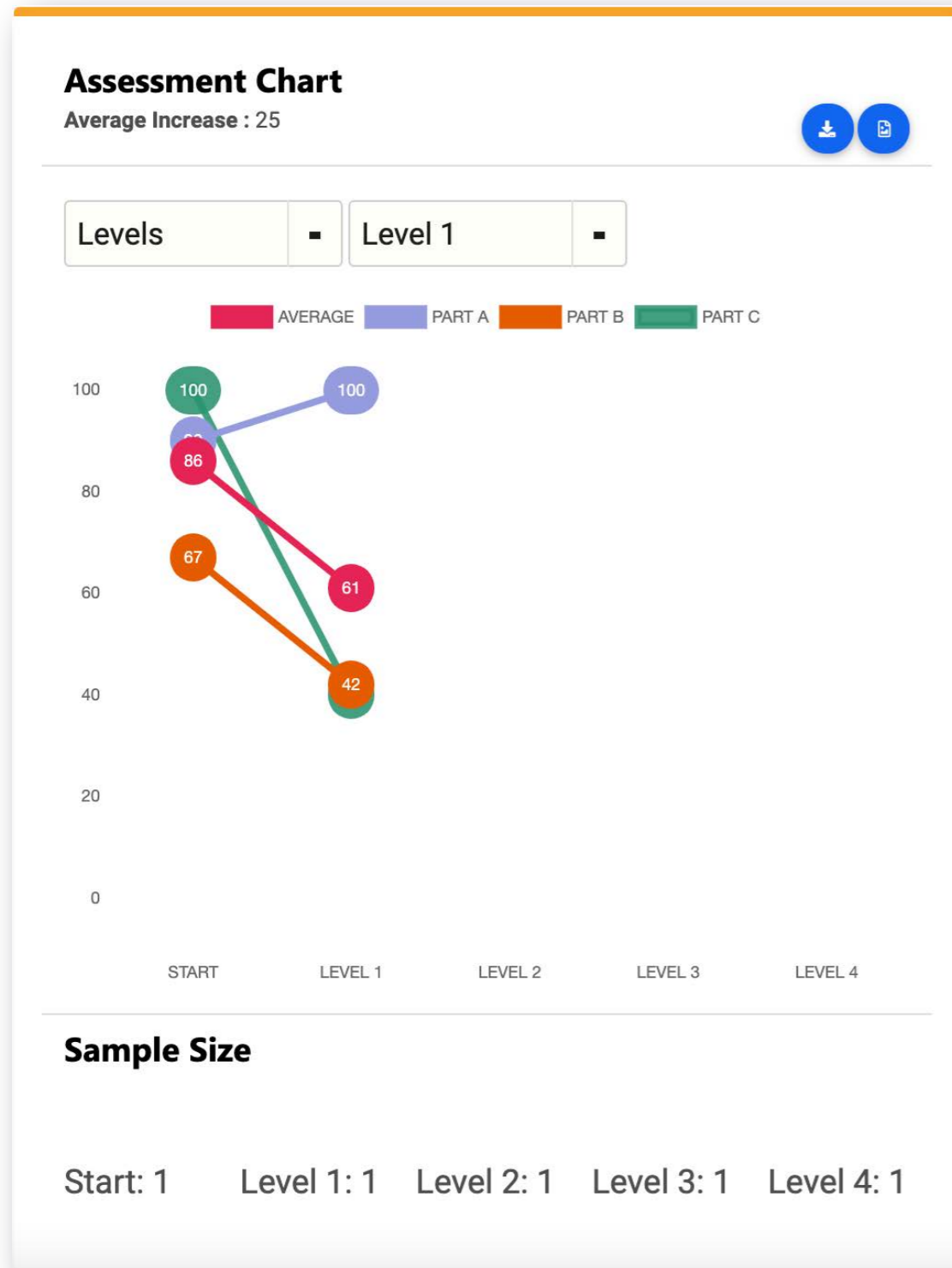
 **User Table**

Show entries Search:

↑ ID	First Name	Last name	Email	Enrolled In	Info
TR21C9517E28	Douglas	Bryntse	douglas.bryntse@practicalcsm.com		
Total Badges	10				
Badges Last 30 Days:	1				
Total Hours:	23				
Hours Spent Last 30 days:	0				
Joined Team:	2021-03-02 10:38:13				
Total Logins	58				
Logins 30	0				
Last Login	2021-06-27 03:42 PM				
Level	New Entrant				



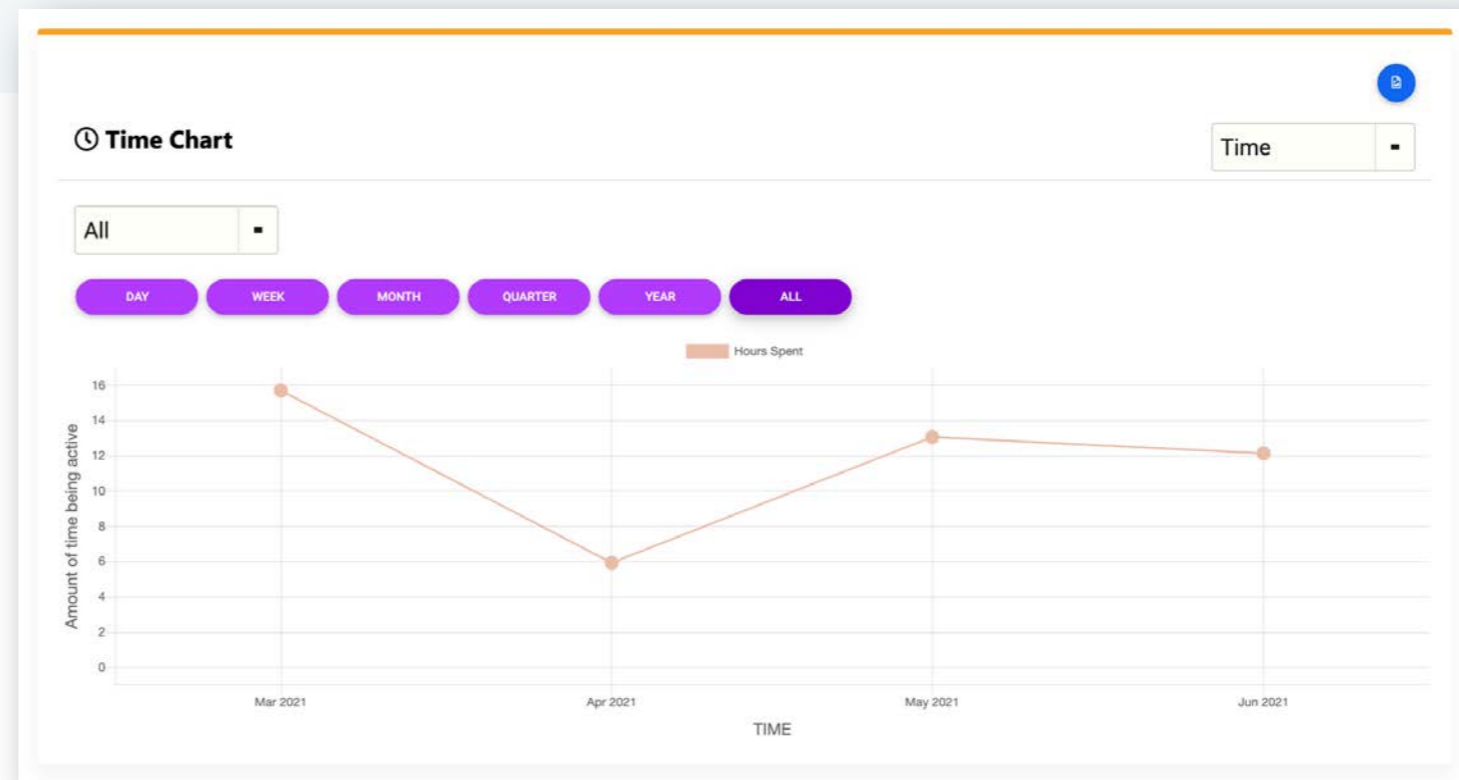
What do you get with Practical CSM Academy?



Team Management

Performance Charts

Alongside raw data about team and individual performance, our sophisticated team management tool also provides a range of graphical representations of important data, giving you practical, hands-on information to enable rapid understanding of where your team is currently, and at what pace they are progressing.



Why the Practical CSM Academy?



We are the top global provider of Customer Success Management training, certification and CPD services. When we talk to Heads of Customer Success organizations who are looking for the *right* training and certification program for their team, they often ask us...

“What sets your offerings apart from your competitors?”

In truth there are very many things that make us unique, different and “we confidently think” head and shoulders better than anything else that’s out there. Below is our shortlist of reasons why we are confident that the Certified CSM Professional program is the right choice for you:

Breadth of Coverage

The program covers all aspects of modern customer success management from initial communication through to engagement evaluation.

Framework Based

The CCSMP program follows the Practical CSM Framework – an acclaimed and widely adopted methodology for Customer Success Management, independently published by Taylor & Francis.

Utilization of Best Practices

Incorporates very latest thinking in customer success tasks, activities, processes and methodologies.

Depth of Coverage

Goes far deeper into core aspects of Customer Success best practices than the majority of competitive offerings.

Proactive and Reactive Modes

Enables students to work at their own pace through the entire syllabus from Module One to Module Ten and/or react in a timely fashion to access any specific training asset on demand.

New Content Every Week

Constantly refreshed and updated training content provides the very latest thinking and enables continuing professional development [CPD].

Multiple Certification Levels

Flexible approach to certification of capability across four certification levels, each one building upon the last.

Independent Syllabus Oversight

A Syllabus Oversight Committee is led by our founder and CEO Rick Adams and includes a panel of 12 independent expert thought leaders in the field of Customer Success Management.

Multiple Learning Styles

Includes viewing, listening, reading and doing training styles to suit all learning preferences.

Gamification

Makes training enjoyable and thus encourages ongoing participation in order to maximize value.

Team Management

Ability to measure and track performance of the team as a whole and individuals within the team.

HD Quality Content

Multimedia training assets created in the studio using professional recording and editing equipment delivers a high-quality learning experience.

Ask the Expert

Ability for students to access our panel of Customer Success Management experts and ask them literally anything they want.

Regular Live Events

A schedule of events runs every week of the year and students can participate as much or as little as they wish in these live learning opportunities.

Simple Navigation

Built from the ground up to provide a simple and enjoyable end user experience for frustration-free self-study from work, home or anywhere else.

Ability to Customize

For larger customers, we offer the option to incorporate your own training materials into the program [at additional cost].

Professional Examination

Final exams are timed and include both tests of knowledge and ability to apply knowledge in real world situations. Students can only retake a failed exam after waiting two days.

Real World Exercises

Every training module contains a scenario-based exercise to enable students to try out their new knowledge and skills safely in a real-world situation.

Pre- and Post- Assessment

We help you to measure the ROI from your investment in Customer Success management training by offering pre- and post-certification assessments for all students.

ALL Training and Exam Fees are Included

Unlike some of our competitors there are no additional fees to be paid to us for any reason – not for our self-study training content, not for our live lectures, and not even for exam fees. Everything is included within the Academy membership fee, with no more to pay!

Testimonials



[Click the image to watch a video testimonial from](#)

Dov Mendelovich

VP Global Customer Success

“I looked for a one-stop-shop for certification and for online training, that people can consume in their own time at their own pace, while I as a manager of the organization can track their progress, and I found that very easy to do with PracticalCSM.com.

I would recommend PracticalCSM.com as a very good starting point for a new Customer Success Organization. The materials are built in a logical order and it provides a very good starting point to teach newcomers to the organization, and to build a common language and common terminology, both inside our organization and actually shared across the CS community.”



Will Pagden

Head of Customer Success

“PracticalCSM.com has revolutionised the way we work. The content is superb and really pushes all the CSMs to challenge themselves and work in a much more effective way.

In particular I have seen a great improvement in the teams stakeholder management and we are turning a big corner in the value we are getting from each interaction with our customers.

I had scanned the market pretty hard, Rick’s professionalism and approach is what won it for me. The experience of purchasing and using the product has been a joy. I can pick up the phone and speak to someone to make suggestions of how it could be different and they listen and respond. Whilst there are other players in the field that offer “similar offerings”

I struggled to find one that got close to Practical CSM. The management dashboard and the ability to understand where my team were struggling has been a real game changer”

Which Membership should you Choose?

Buy **Basic** for CS Awareness

The truly customer-centric organization recognizes the need for all customer facing employees to at least understand the basics of what Customer Success is, why it is important for both supplier and customer alike, and how it works in real world situations. Our Basic package provides a high quality foundation in Customer Success that enables people in roles that collaborate with and support the Customer Success Manager to do so in a more productive and effective way.

Basic membership provides over twenty hours of formal training content plus Level One (Specialist) certification for a very low annual cost.

- **Account Managers**
- **Customer Support Personnel**
- **Marketing Professionals**
- **Product Specialists**
- **Licensing Specialists**
- **Client Services Advisers**



There are two sides to Customer Success – the role and the philosophy. For Customer Success practitioners we offer our Full membership, but there are many within a modern business who will not be tasked with performing the role of Customer Success Manager, but who nevertheless need to apply the underlying philosophy of Customer Success to their own roles.



Which Membership should you Choose?



There are two sides to Customer Success – the role and the philosophy. For Customer Success practitioners we offer our Full membership, but there are many within a modern business who will not be tasked with performing the role of Customer Success Manager, but who nevertheless need to apply the underlying philosophy of Customer Success to their own roles.



Buy **Full** for CS Competence

Full membership includes well over 100 hours of formal training content leading to four levels of certification, including the final Certified CSM Professional award, plus access to literally hundreds of additional learning assets in our fully catalogued database of “on-demand” content. It also includes multiple live instructor-led online learning events every month and access to our Successopedia.

Full membership is very reasonably priced yet fully featured to enable ongoing career development for all Customer Success professionals at all levels from new hires through to senior leaders.

- **Customer Success Managers**
- **Client Success Managers**
- **Customer Success Directors**
- **Customer Success Leaders**
- **Customer Success Specialists**
- **Customer Success VPs**

Which Membership should you Choose?

Buy **Member-Only** for CPD Access

Most of our customers purchase access to the Academy in order to undergo certification training. But what do you do once you have completed your certification training program?

Member-Only access provides access to the Academy's complete suite of Live Events and library of over a thousand CS-related learning assets for a further twelve months and incorporates a range of recommended "CPD Learning Paths" that keep your team members' knowledge and skills up-to-date and refreshed and give them further competence and confidence for their in-the-field work.

- **Account Managers**
- **Customer Support Personnel**
- **Marketing Professionals**
- **Product Specialists**
- **Licensing Specialists**
- **Client Services Advisers**



Maintaining Your Existing Certifications

Completing one or more CPD Learning Paths each year enables your team members to maintain their existing Certifications for up to five years *without* the need to retake lessons or exams.



Which Membership should you Choose?



Buy **Manager** for Team Performance Tracking

For some managers (for example Team Leaders), there will be a need for them not just to access the Team Management functionality but also to go through and complete the training and certification process for themselves. These managers will need full membership licenses for the relevant level of certification.

However, you may also have a number of more senior managers, or "administration-only" managers who either are not Customer Success management specialists themselves (for example they work in HR or training) or for whom the training is not relevant to their specific role (for example they have a VP or "C" level role).

For those of your managers who do not want or require training for themselves, you can purchase a low-cost Management-only access licence, enabling them to log in to view and track their team's progress, but without the burden of having to purchase unnecessary training that they do not require.

- **Customer Success Managers**
- **Client Success Managers**
- **Customer Success Directors**
- **Customer Success Leaders**
- **Customer Success Specialists**
- **Customer Success VPs**

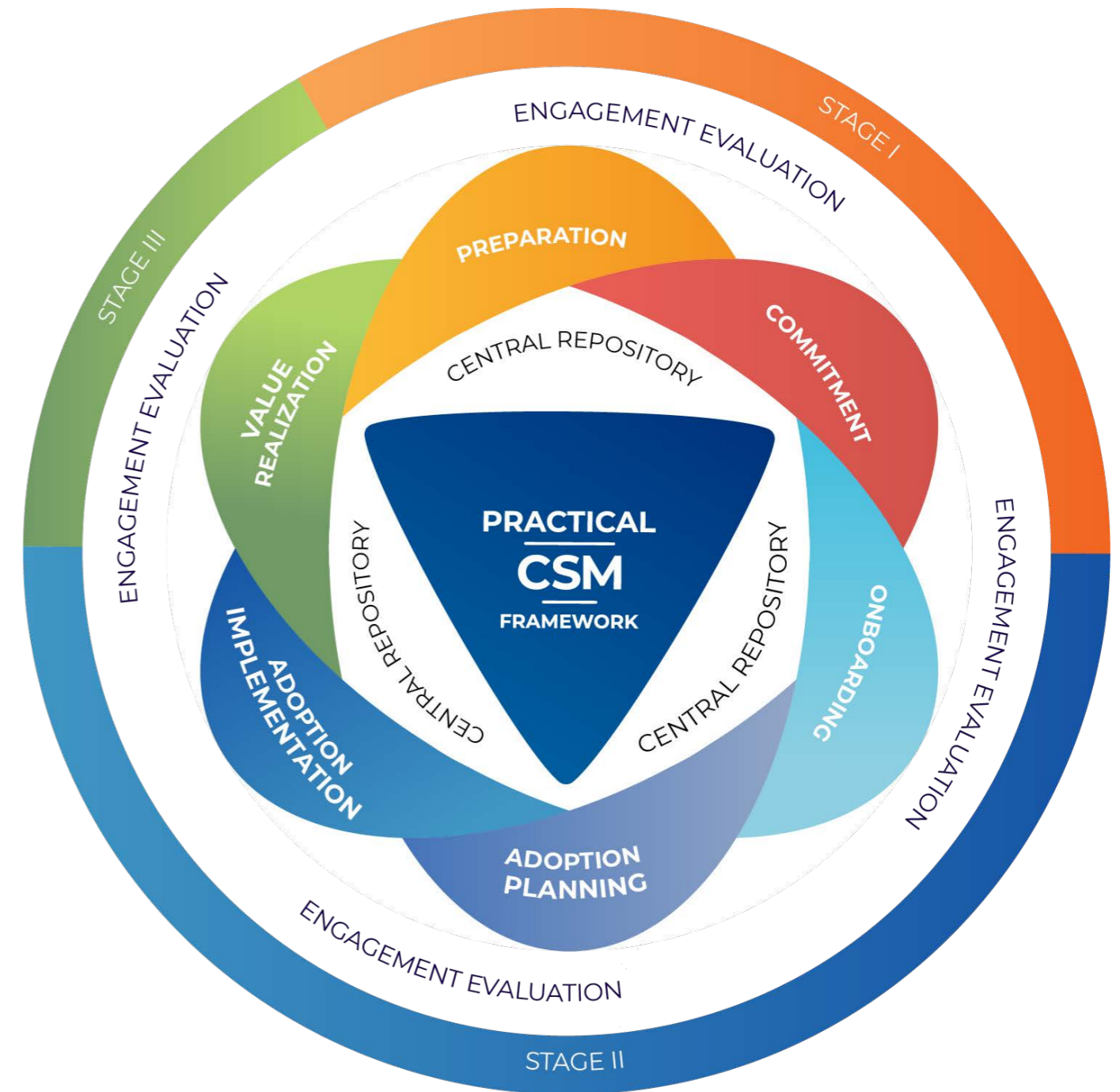


	PCSM Academy Basic	PCSM Academy Full	PCSMA Manager	PCSMA Member Only
Price	\$397.00	\$1,437.00	\$247.00	\$422.00
Type	Certification & Membership	Certification & Membership	Team Reporting & Membership	Membership
Modules	2	10	-	-
Certification	Certified CSM Professional Level 1	Certified CSM Professional Level 1, Level 2, Level 3, Level 4	-	-
Video Lessons	2h	40h	-	-
Quizzes	-	-	-	-
Tests	2	10	-	-
Exams	-	2	-	-
Workbooks	4	20	-	-
Exercises	2	10	-	-
Academy Access	Yes	Yes	Yes	Yes
CPD Library	-	Yes	-	Yes
Workshops	-	Yes	-	Yes
Successopedia	-	Yes	-	Yes
Team Management	1 Manager Account per 10 licenses	1 Manager Account per 10 licenses	Yes	N/A



The Practical CSM Framework

Step-by-step, best practice guidance for CSMs right from initial preparation through to ultimate value realization, and everything in between.





PRACTICAL CSM
ACADEMY

Practical CSM **Academy**

*A Revolution in Customer Success
Training Certification and CPD*

practicalcsm.com/academy