# PRACTICAL CSM

MAKING CUSTOMER SUCCESS SIMPLE

# PRACTICAL CSM PRODUCT & SERVICES CATALOGUE

*Online Self-Study Courses, Instructor-Led Courses, Training Materials and many more.*

**Contact Us**

www.practicalcsm.com          sales@practicalcsm.com

# ABOUT PRACTICAL CSM

## What Do We Do?

We provide training, certification, coaching, and consulting on and around the field of Customer Success Management. Our portfolio includes instructor-led training and coaching (classroom and virtual) as well as our flagship online self-study platform called the *Practical CSM Academy* and our online self-study training and certification program called the *Certified CSM Professional* (CCSMP) program.

## Who Are Our Clients?

Our customers include both private individuals and organizations. Many of our individual clients come to us to support their career change aspirations, but many are seasoned CSMs who want to get a proper qualification for their resumé. Our business clients range from brand new SaaS startups right through to multi $bn blue chip MNCs. What they all have in common is a desire to receive the very best CS training available.

## Who Are We?

Our CEO and Founder is author, industry speaker and multi-award-winner Rick Adams. Rick is the driving force behind our *Practical CSM Framework* and the content of our training courses and certification programs. Our COO Marek Malinowski manages all of the technical and operational sides of the business. In addition, we have a fantastic team of products, sales, marketing, support, design and admin specialists.

**140,000 students***

**50,000 followers**

**30,000 subscribers**

*including third party learning providers who use our learning content under licence*

# ABOUT PRACTICAL CSM

## Why Buy From Us?

| | |
|---|---|
| **Industry Expertize** | We have over 30 years of experience in business consulting, coaching and training in the technology space |
| **Quality of Product** | Our training products are second to none in their design, and are exceptionally easy for students to use |
| **Range of Portfolio (incl CPD)** | We cover the full range of the post-sales customer journey, from basic skills to strategy formulation |
| **Focus on Practical Knowledge/Skills** | All our training is founded in the Practical CSM Framework, making it simple, effective, and scalable |
| **Customization** | Our workshops can be delivered in standard format or they can be customized to meet any requirement |
| **Customer Outcomes Focus** | At Practical CSM we don't just sell you a training product, we work with you to achieve you training ROI |

# ABOUT PRACTICAL CSM

## Rick Adams
### Founder & CEO of Practical CSM
### Author of our Customer Success Management training programs

Rick Adams is an author, trainer, and consultant, specializing in helping technology companies deliver measurable business value. Adams has over 25 years' experience of working in the IT industry, including owning his startup software-as-a-service business, which he sold in 2012 to focus on writing, training, and consulting.

Adams has delivered training and consultancy to hundreds of businesses and thousands of technology professionals in over thirty countries across four continents. His Customer Success Management work includes developing and delivering the Cisco Certified Customer Success Manager global certification program for Cisco Systems.

His book '*Practical Customer Success Management: A best practice framework for managers and professionals*' was published in 2019 and is available from Amazon and all other book retailers.

Adams is now based on the rural west coast of Ireland, where he lives with his three dogs, Zeus, Terri & Brandi. His current interests include helping individuals and companies develop best practices in customer success management and business outcomes-focused selling.

# TESTIMONIALS

"Not only would I recommend Practical CSM for other CS Leaders, I look forward to continuing to work with you in the future"

**Rebecca Nerad**
*VP Customer Success*

e2open®

"You have been amazing, and the feedback [from my team] on the training has been TOP NOTCH. Thank you so much for your support!"

**Jennifer Williams**
*Senior VP of Customer Success*

shiphero™

**CLICK HERE FOR MANY MORE TESTIMONIALS**

# OUR PRODUCTS & SERVICES

- Online Self-Study Courses & Programs
- CPD Memberships & Team Management
- Workshops / Instructor-Led Training
- Customer Success Training Strategy
- Customer Success Training Consultation

**PRACTICAL CSM**
MAKING CUSTOMER SUCCESS SIMPLE

# ONLINE SELF-STUDY COURSES & PROGRAMS

**ONLINE SELF-STUDY**
*Certified Customer Success Manager Professional Comprehensive - Levels 1-4*

# CERTIFIED CUSTOMER SUCCESS MANAGER PROFESSIONAL COMPREHENSIVE - LEVELS 1-4

## Who is it for?

For all professionals at all levels of seniority from junior upwards who will be employed in full time Customer Success Management activities

## How long does it take to complete?

Usually from 6 to 12 months, depending upon the learning speed of the student and the number of hours per month dedicated to studying

## What does it include?

A complete and detailed education on the entire Customer Success Management end-to-end customer journey, including tools, processes, and best practices

## What do I get at the end?

Students who pass the online exams covering both knowledge and practical application are awarded our prestigious Certified CSM Professional Level 4 certification.

OUTSTANDING PROFESSIONAL ACCOMPLISHMENT

Certified CSM Professional Level 4

PRACTICAL CSM ACADEMY

"I am thrilled to have completed your Customer Success Management training series, and I'm amazed by how much I've learned and the level of confidence it has given me!"

**Lady Morganne Torres**
Customer Success Specialist

# Module 1: Customer Success Fundamentals

**Lessons:**

- What is Customer Success?

- How Does Customer Success Work?

- Customer Renewals and Retention/Churn

- Customer Success in Different Business Types

- Land and Expand Sales Motions

- Customer Advocacy and Lifetime Value

- Tenets of Customer Success – Parts 1-5

# Module 2: Business Fundamentals

**Lessons:**

- CSMs and Business Awareness

- Why Businesses Exist

- How Businesses Create Value for Owners

- Who Else Businesses Create Value For

- How Expenditure & Profits are Calculated

- Customer Segments & Value Propositions

- How Businesses Work: Organization

- How Businesses Work: Capabilities

- Principles of Business Management: Drivers for Change

- How Businesses Work: Strategy Formulation

- The Business Motivation Model (BMM)

# Module 3: Practical CSM Framework Phase 1: Preparation

**Lessons:**

- Providing a Joined Up Customer Experience

- Sources for Researching Customer Information

- Selecting & Validating Customer Information

- Information to Research – Part One

- Information to Research – Part Two

- The Customer Research Checklist Tool – Part One

- The Customer Research Checklist Tool – Part Two

- The Customer Research Checklist Tool – Part Three

- The Customer Research Checklist Tool – Part Four

- Engagement Planning & Engagement Strategy Tool

- Engagement Strategy – Part One

- Engagement Strategy – Part Two

# Module 4: Practical CSM Framework Phase 2: Commitment

**Lessons:**

- 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

# Module 5: Practical CSM Framework Phase 3: Onboarding

**Lessons:**

- What is "Onboarding"?

- Why is Onboarding Important?

- Onboarding Vs Adoption Vs Value Realization

- Selecting an Onboarding Service Model – Part One

- Selecting an Onboarding Service Model – Part Two

- Onboarding Services at Your Company

- Selecting the Onboarding Model

- Customized Onboarding and Full Adoption Services

- Information for Generic Onboarding

- Information for Customized Onboarding

- Managing the Onboarding Process

# Module 6: Practical CSM Framework Phase 4: Adoption Planning

**Lessons:**

- Adoption Fundamentals

- Adoption and Change Management

- 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 – Part One

- Adoption Planning Tools  – Part Two

- Adoption Planning Tools – Part Three

# Module 7: Practical CSM Framework Phase 5: Adoption Implementation

**Lessons:**

- Adoption Implementation Roles

- Project Management Principles & Best Practices

- Preparing for Project Kick-Off

- Managing People

- Managing End User Conflict

- Adoption Task Management Tools – Part One

- Adoption Task Management Tools – Part Two

- Adoption Activity Measurement

- Adoption Activity Reporting

- Best Practices for Problem Handling

- Adoption Project Completion

# Module 8: Practical CSM Framework Phase 6: Value Realization

**Lessons:**

- Promised and Anticipated Value

- Determining the Value Generated

- Value is Not Always the Same

- Consultative Questioning

- Selecting Key Performance Indicators (KPIs)

- Problems With Value Realization

- Measuring Progress

- Steps in the Performance Management Process

- Defining the Outcome Requirements and KPIs

- If Stakeholders Don't Know or Cannot Agree What They Want…

- Converting Indirect Value into Direct (Financial) Value

- Working to the Customer's Agenda

- Problem Solving and Root Cause Analysis – Parts 1-3

- The Role of the CSM in Sales Activities

- Using Consultative Questioning to Determine Outcome & KPI Requirements – Parts 1-4

- Reporting on Progress Towards Outcome Attainment

- Reporting on the Financial Returns from the Investment

# Module 9: Practical CSM Framework Phase 7: Engagement Evaluation

**Lessons:**

- The Executive Business Review (EBR)

- Executive Business Review Best Practice

- The Importance of Engagement Evaluation – Part One

- The Importance of Engagement Evaluation – Part Two

- Using the Engagement Evaluation Tool

- Using the Personal Evaluation Tool

- The Customer Success Roadmap

- Example Customer Success Roadmap
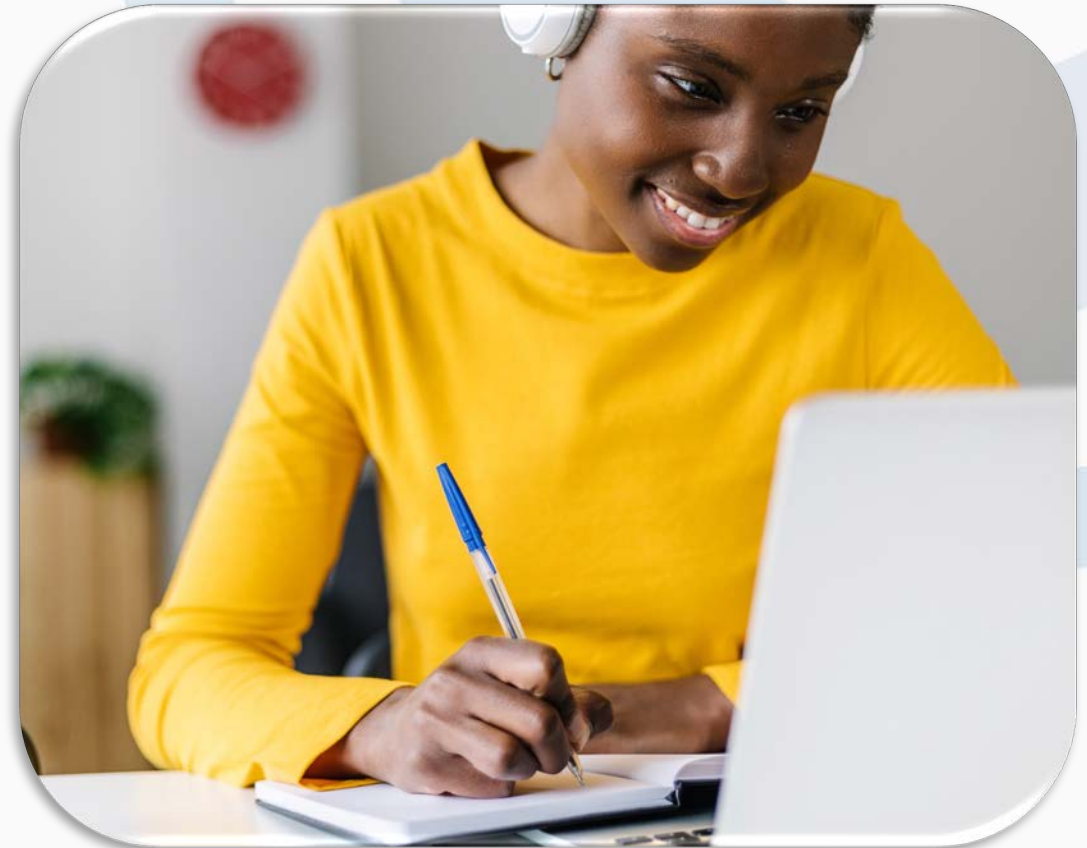
## Module 10: Putting It All Together

**Lessons:**

- The Customer Success Knowledgebase

- Using a Best Practice Framework

- Using Tools & Templates – Part One

- Using Tools & Templates – Part Two

- Who Benefits from Customer Success Management?

- Partnering with Customers

- Common CSM Traps & Pitfalls – Part One

- Common CSM Traps & Pitfalls – Part Two

- Common CSM Traps & Pitfalls – Three

# Final Exams

### Exam A

Exam A is designed to test the candidate's overall knowledge and understanding of Customer Success management best practices. It includes 50 questions that must be answered within 60 minutes and there is no going back to change answers.

### Exam B

Exam B is designed to test the candidate's ability to apply their knowledge to a range of common challenges. It includes 8 scenario-based questions that must be answered within 40 minutes and candidates cannot go back to change answers.

### Exam Methodology

Both exams are delivered online in an "open book" format. The candidate's answers are automatically marked, and results are shown immediately. Candidates can only Pass or Fail. Candidates that fail must wait 3 days before re-attempting the exam. Both Exams A and B must be passed in order to be awarded the Level 4 Certification.



LEVEL 4

Certificate ID: 56003FD83400KL4

We are delighted to award the status of:

**Certified Customer Success Management Professional**

**To: Reginald Hunter-Barrowman**

Member ID: 0078FD89274FT4

On This Date: 01 March 2023
Expiry: Two Years from Certification Date

Rick Adams, Founder & CEO, The Practical CSM Academy

**PRACTICAL CSM**
ACADEMY

# ONLINE SELF-STUDY
*Certified Customer Success Manager Professional Basics - Level 1*

## CERTIFIED CUSTOMER SUCCESS MANAGER PROFESSIONAL BASICS - LEVEL 1

### Who is it for?

For all customer-facing professionals who are not dedicated to the role of Customer Success Management but who need a basic understanding of the basics to fulfil their role

### How long does it take to complete?

Usually from 1 to 2 months, depending upon the learning speed of the student and the number of hours per month dedicated to studying

### What does it include?

An overview of the entire Customer Success Management role, together with an introduction to business management best practices

### What do I get at the end?

Students who pass the online exam are awarded our basic Certified CSM Professional Level 1 certification.

PROFESSIONAL ACHIEVEMENT

CCSMP Level 1

PRACTICAL CSM ACADEMY

"Thank you for all the advice and instruction you have provided with your program. I went from zero to a fulfilling career as a CSM thanks to you."

Craig Mosenson
Principal Customer
Success Manager, Oracle

# Module 1: Customer Success Fundamentals

**Lessons:**

- What is Customer Success?

- How Does Customer Success Work?

- Customer Renewals and Retention/Churn

- Customer Success in Different Business Types

- Land and Expand Sales Motions

- Customer Advocacy and Lifetime Value

- Tenets of Customer Success – Parts 1-5

# Module 2: Business Fundamentals

**Lessons:**

- CSMs and Business Awareness

- Why Businesses Exist

- How Businesses Create Value for Owners

- Who Else Businesses Create Value For

- How Expenditure & Profits are Calculated

- Customer Segments & Value Propositions

- How Businesses Work: Organization

- How Businesses Work: Capabilities

- Principles of Business Management: Drivers for Change

- How Businesses Work: Strategy Formulation

- The Business Motivation Model (BMM)

# Final Exam

### Final Exam

The Final Exam is designed to test the candidate's overall knowledge and understanding of basic Customer Success management best practices. It includes 20 questions that must be answered within 30 minutes.

### Exam Methodology

The exam is delivered online in an "open book" format. The candidate's answers are automatically marked, and results are shown immediately. Candidates can only Pass or Fail. Candidates that fail must wait 3 days before re-attempting the exam.



LEVEL 1

Certificate ID: 56003FD83400KL4

We are delighted to award the status of:

**Certified Customer Success Management Professional**

**To: Reginald Hunter-Barrowman**

Member ID: 0078FD89274FT4

On This Date: 01 March 2023
Expiry: Two Years from Certification Date

Rick Adams, Founder & CEO, The Practical CSM Academy

**PRACTICAL CSM**
ACADEMY

PROFESSIONAL ACHIEVEMENT

CCSMP
Level 1

# CSM ESSENTIALS – CUSTOMER SUCCESS COMPREHENSIVE

## Who is it for?

For all customer-facing professionals who need to get an in-depth understanding of Customer Success Management but on a no-frills low budget.

## How long does it take to complete?

About 3 to 6 months, depending upon the learning speed of the student and the number of hours per month dedicated to studying

## What does it include?

Basic style in-depth training on the entire Customer Success Management role, but without exercises, tests, tools, etc.

## What do I get at the end?

Students who complete the program are provided with a Certificate of Completion.



Date: 02-03-2023
Certificate ID: 0000000000

**CSM ESSENTIALS**
**CERTIFICATE OF COMPLETION**

*This is to certify that*
**JEANETTE MULLHOLLAND**
Member ID: TR00FB000C8

*has successfully completed the following training course:*
**CUSTOMER SUCCESS COMPREHENSIVE**
Course ID: CSE-C

**PRACTICAL CSM**
MAKING CUSTOMER SUCCESS SIMPLE

**Rick Adams**
Founder & CEO of Practical CSM

**Knowledge Training**

# Module 1: Customer Success Fundamentals

**Lessons:**

- What is Customer Success Management?

- How Does Customer Success Work?

- Customer Success and Different Business Models

- Customer Success and Land and Expand Sales Motions

- Customer Success and Customer Lifetime Value (CLV)

- Customer Success and Customer Advocacy

- 14 Tenets of Customer Success – Parts 1-5

**Knowledge Training**

# Module 2: Business Fundamentals

**Lessons:**

- CSMs and Business Awareness

- Why Businesses Exist

- How Businesses Create Value for Owners

- Who Else Businesses Create Value For

- How Expenditure & Profits are Calculated

- Customer Segments & Value Propositions

- How Businesses Work: Organization

- How Businesses Work: Capabilities

- Principles of Business Management: Drivers for Change

- How Businesses Work: Strategy Formulation

- The Business Motivation Model (BMM)

**Knowledge Training**

# Module 3: Engagement Preparation

**Lessons:**

- Providing a Joined Up Customer Experience

- Sources for Researching Customer Information

- Selecting & Validating Customer Information

- Information to Research – Part One

- Information to Research – Part Two

- Working With the Customer: Key Concepts

- Working With the Customer: Credibility & Rapport

- The Customer Success Proposal

- Meetings Best Practice

- Consultative Questioning

**Knowledge Training**

# Module 4: Onboarding and Adoption

**Lessons:**

- What is "Onboarding"?

- Why is Onboarding Important?

- Onboarding Vs Adoption Vs Value Realization

- Selecting an Onboarding Service Model – Part One

- Selecting an Onboarding Service Model – Part Two

- Managing the Onboarding Process

- Adoption Fundamentals

- Knowledge, Skills & Attitude (KSA) Concepts

- Directly & Indirectly Impacted Users

- Adoption Implementation Roles

- Project Management Principles & Best Practices

**Knowledge Training**

# Module 5: Value Realization

**Lessons:**

- Promised and Anticipated Value

- Determining the Value Generated

- Value is Not Always the Same

- Consultative Questioning

- Selecting Key Performance Indicators (KPIs)

- Problems With Value Realization

- Measuring Progress

- Steps in the Performance Management Process

- Defining the Outcome Requirements and KPIs

- If Stakeholders Don't Know or Cannot Agree What They Want…

**Knowledge Training**

# Module 6: Engagement Evaluation

**Lessons:**

- The Importance of Engagement Evaluation – Part One

- The Importance of Engagement Evaluation – Part Two

- The Executive Business Review (EBR)

- Executive Business Review Best Practice

- The Customer Success Roadmap

**Knowledge Training**

# Module 7: Avoiding Common Traps & Pitfalls

**Lessons:**

- Who Benefits from Customer Success Management

- Partnering with Customers

- Common CSM Traps & Pitfalls – Part One

- Common CSM Traps & Pitfalls – Part Two

- Common CSM Traps & Pitfalls – Part Three

# Skill Training

**Lessons:**

- **Listening and Questioning** – These lessons will help you gain the ability to employ active listening skills that enable rapport-building and that help you to ensure you have understood not just the words but the meaning behind those words. The consultative questioning approach described in this course will help to ensure that all the right questions get asked and that you identify the right way to ask questions that will bring forth the most valuable answers.

- **Data Analysis and Reporting** – Data can be used to set expectations and then to measure real progress and compare the two to find out if the actual performance meets the predicated or desired performance. Our Data Analysis & Reporting course will equip you with the skills on: Understanding data, its analysis, and reporting; Conducting internal data analysis and reporting; and Handling customer data analysis and its presentation.

- **Storytelling** – Become the storyteller that drives the narrative from initial challenges through to ultimate destinations. Understand what it takes to vividly explain a story that influences people to start, maintain, and ultimately complete their (sometimes arduous journey) in order to attain success.

- **Problem Solving** – This part of the series will help you: Understand what problem-solving is; Identify the potential impact of problems; Conduct a Root Cause Analysis; and Determine and implement the Right Intervention.

# Skill Training

**Lessons:**

- **Time Management** – Learn how to deal with time, prioritize essential tasks, divide larger projects into smaller, more manageable chunks, create meaningful project plans, and manage your schedule efficiently and effectively. By the end of this course you will have the knowledge and skills to be a Customer Success Manager that utilizes their own and others' time to its utmost capacity.

- **Leadership and Negotiation** – Where conflict occurs, part of the CSM's responsibility is to negotiate solutions that all parties find acceptable, and then influence those parties to work together towards resolution of the challenge. To do this requires leadership and negotiation skills and best practices that are revealed and discussed in this Leadership & Negotiation course.

- (Coming Soon) **Project Management**

- (Coming Soon) **Selecting Meaningful KPIs**

# CSM ESSENTIALS – CUSTOMER SUCCESS BASICS

## Who is it for?

For all customer-facing professionals who are not dedicated to the role of Customer Success Management but who need a basic introduction only

## How long does it take to complete?

About 2 weeks to 1 month, depending upon the learning speed of the student and the number of hours per month dedicated to studying

## What does it include?

An overview of the entire Customer Success Management role

## What do I get at the end?

Students who complete the program are provided with a Certificate of Completion.



Date: 02-03-2023
Certificate ID: 0000000000

**CSM ESSENTIALS**
**CERTIFICATE OF COMPLETION**

This is to certify that
**JEANETTE MULLHOLLAND**
Member ID: TR00F8000C8

has successfully completed the following training course:
**CUSTOMER SUCCESS BASICS**
Course ID: CSE-B

**PRACTICAL CSM**
MAKING CUSTOMER SUCCESS SIMPLE

**Rick Adams**
Founder & CEO of Practical CSM

**Knowledge Training**

# Module 1: Customer Success Fundamentals

**Lessons:**

- What is Customer Success Management?

- How Does Customer Success Work?

- Customer Success and Different Business Models

- Customer Success and Land and Expand Sales Motions

- Customer Success and Customer Lifetime Value (CLV)

- Customer Success and Customer Advocacy

- 14 Tenets of Customer Success – Parts 1-5

**Knowledge Training**

## Module 2: Business Fundamentals

**Lessons:**

- CSMs and Business Awareness
- Why Businesses Exist
- How Businesses Create Value for Owners
- Who Else Businesses Create Value For
- How Expenditure & Profits are Calculated
- Customer Segments & Value Propositions

- How Businesses Work: Organization
- How Businesses Work: Capabilities
- Principles of Business Management: Drivers for Change
- How Businesses Work: Strategy Formulation
- The Business Motivation Model (BMM)

# Skill Training

**Lessons:**

- **Listening and Questioning** – These lessons will help you gain the ability to employ active listening skills that enable rapport-building and that help you to ensure you have understood not just the words but the meaning behind those words. The consultative questioning approach described in this course will help to ensure that all the right questions get asked and that you identify the right way to ask questions that will bring forth the most valuable answers.

- **Data Analysis and Reporting** – Data can be used to set expectations and then to measure real progress and compare the two to find out if the actual performance meets the predicated or desired performance. Our Data Analysis & Reporting course will equip you with the skills on: Understanding data, its analysis, and reporting; Conducting internal data analysis and reporting; and Handling customer data analysis and its presentation

- **Storytelling** – Become the storyteller that drives the narrative from initial challenges through to ultimate destinations. Understand what it takes to vividly explain a story that influences people to start, maintain, and ultimately complete their (sometimes arduous journey) in order to attain success.

# ONLINE SELF-STUDY COMPARISON TABLE

| Name | CSM Essentials | | Certified CSM Professional | |
|---|---|---|---|---|
| | Customer Success Basics | Customer Success Comprehensive | Certified CSM Professional Basics | Certified CSM Professional Comprehensive |
| Platform | PCSM Learning | | PCSM Academy | |
| Type | Skills Course with Certificate of Completion | | Professional Training & Certfication Program | |
| Certificate Type | Certificate of Completion | | Certificate Of Expertise | |
| Levels | 1 | 1 | 1 | 4 |
| Modules | 3 | 9 | 2 | 10 |
| Video Lessons (hours) | 4 | 13 | 2 | 20 |
| Video Quality | High | High | Premium | Premium |
| Completion Time (hours) | 5 | 18 | 10 | 80 |
| Tests | 1 | 1 | 2 | 10 |
| Exams | - | - | 1 | 3 |
| Workbooks | - | - | 4 | 10 |
| Exercises | - | - | 2 | 10 |
| Team Management | - | - | Available | Available |
| CPD Membership | - | - | Available | Available |
| Full CSM Package | - | - | - | Available For 10+ Seats |

PRACTICAL CSM
MAKING CUSTOMER SUCCESS SIMPLE

# CONTINUING PROFESSIONAL DEVELOPMENT (CPD) & TEAM MANAGEMENT

**CONTINUING PROFESSIONAL DEVELOPMENT (CPD) & TEAM MANAGEMENT**

# PRACTICAL CSM ACADEMY CPD ADVANTAGE MEMBERSHIP

- *Live Learning*
- *CPD Library*
- *CPD Paths*
- *Essential Skills Courses*
- *Successopedia*

# What is "CPD Advantage Membership"?

Put simply, **CPD Advantage Membership** is the Practical CSM Academy membership level that full Academy members transfer onto in Year Two onwards. The difference with Advantage Membership is that it enables your team members to retain and renew their existing **Certified CSM Professional (CCSMP)** certifications *and* continue with their CPD activities **without the need to pay for the CCSMP program a second time**.

Below are the core benefits of **CPD Advantage Membership** for your team members:

✓  Retain your existing CCSMP certifications
✓  Continue to complete the CCSMP program (if necessary)
✓  Renew your Level 4 certification for a further 12 months
✓  Gain a further 12 months access to our Content Library for CPD
✓  Gain a further 12 months access to our schedule of Live Training events
✓  Gain a further 12 months access to our Successopedia functionality
✓  Access our new range of *CS Skills* courses for Year Two members only
✓  Continue to track, manage, and report on team activity

# Live Learning

## Interact with peers and instructors.

Every month, we provide a smorgasbord of all sorts of live events for our members to select from and register to attend. These include training lessons, skills workshops, lectures, interviews with senior thought leaders, mentoring sessions, and much more.

## 2023 Live Events Series

✓ **Customer Success Leadership Conversations** - Monthly LIVE conversations on a wide variety of CS Leadership topics

✓ **Women Leaders in Customer Success** - Monthly LIVE podcast interview series

✓ **Customer Success Leadership Skills** - Monthly LIVE training sessions

✓ **The Practical CSM Framework -** Monthly LIVE training sessions

**Recorded Events**

Select this option to view our catalog of all previously recorded live training and live interviews in a simple, searchable format. These are not "live" as such because you will be watching the playback of previously live events, but they do still retain the "live" feel, and allow for many more events to be made available for access at any one time.

GO TO R

**Live Events Calendar**

Select the Live Events Calendar to get a different, month-by-month view of all upcoming live events and to register onto whichever events are of interest to you.

GO TO THE LIVE EVENTS CALENDAR

**Live Training**

Select the Live Training option to view and register onto upcoming live training events.

GO TO LIVE TRAINING

**Live Interviews**

Select the Live Interviews option to view and register onto upcoming live discussion events featuring invited guests.

GO TO LIVE INTERVIEWS

# CPD Library

Within our content library, we have thousands of bite-sized learning assets including videos, podcasts, articles, checklists, templates and more. The content includes not just core learning about Customer Success Management but also broader and deeper learning on a wide range of connected topics. Our fully indexed and searchable database allows you to quickly and easily access all sorts of learning assets relating to the precise subject matter you need.



**ENGAGEMENT REPORTING CHECKLIST**

A series of simple checklists designed for use during Practical CSM Framework Phase Seven: Engagement Evaluation, that provide a way to summarize the challenges, tools, lessons, improvements and successes for each framework phase of an engagement

**DOWNLOAD**

Categories: Phase 7: Engagement Evaluation,
phase 7, phase seven, Questionnaire, templa

**PLANNING FOR PRODUCT ADOPTION – STEP**

The fifth of a six part series of articles that provide a detailed, step
your company's solutions. This fifth article in the series looks at St

**MY FIRST 30 DAYS IN CUSTOMER SUCCESS**

A conversation with Amanda Hsiung. Amanda is a very newly started customer success manager at Subvertical – a Santa Barbara-based software company that provides flexible, affordable and easy to use tools to solve the data management and analysis problems that face the social service and public health sectors. Amanda talks about how she secured her first CS role and her experiences in that role during the first 30 days

- "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 – R & Musings with Rick Adams
- A New Approach to Scaling Customer Success – Part 1
  A New Approach to Scaling Customer Success – Part 2

**Introduction**

**Step 3: Create Impacted Groups (IGs)**
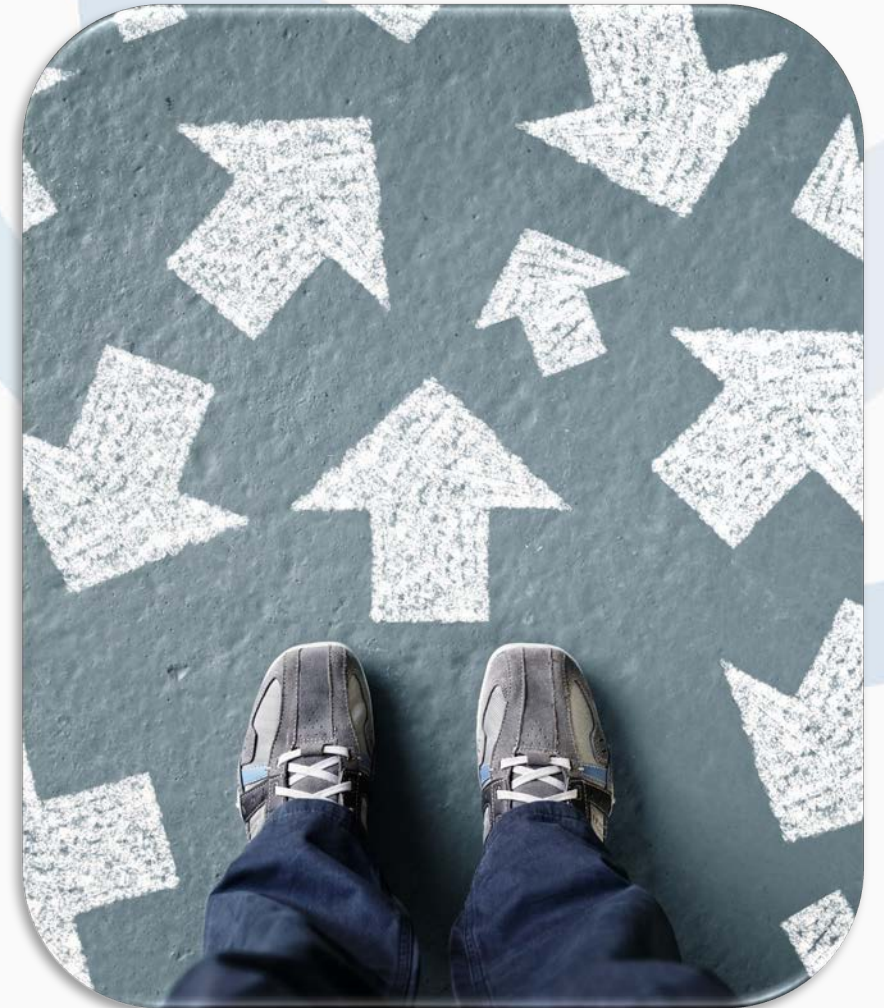
# CPD Paths* (Practical CSM Academy)

With so many learning assets to choose from, how do you know which content to select for your own studies? For Team Managers, how do you make sure your team are maximizing the ROI from your investment by learning the right things, in the right order, and at the right time?

A CPD Path is a list of training assets on a specific topic that we have pre-assembled. You can use CPD Paths to quickly access training on topics of interest and importance to you. As a Team manager, you can use CPD Paths to assign learning assets on a chosen topic to your team members with one button press.

Learners can track their progress through their CPD Paths in the Dashboard, and all hours completed will contribute towards CPD targets. Similarly, Team Managers can monitor each team member's progress through each CPD Path they assign.

CPD Paths takes a lot of the guesswork out of using the CPD library and enables more time to be made available for *doing* the learning by reducing the time taken to **decide** on what learning to do.

*CPD Paths will be available on the Academy in Q2 2023

# Essential Skills for CS Professionals Course

## Basic Skills for CSMs

Our Basic Skills for CSMs program covers each of the fundamental skill areas that a successful Customer Success Manager will draw upon to do their job well. Containing a wide range of skills from problem identification to dealing with difficulties, the Basic Skills for CSMs program is a comprehensive range of courses, teaching you the basics of each essential skill to help you achieve value for your customers.

Begin your journey to becoming an effective CSM who drives growth, reduces churn, and generates rapid value for customers and your own company!

- ✓ **Change Management**
- ✓ **Listening & Questioning**
- ✓ **Stakeholder Management**
- ✓ **Data Analysis & Reporting**

- ✓ **Problem Solving**
- ✓ **Leadership & Negotiation**
- ✓ **Time Management**
- ✓ **Storytelling**



**Customer Success Basics**
*what every CSM should know*

**Change Management Productivity Curve**

**Customer Success Basics**
*what every CSM should know*

**Time Management Hot Tips 1 of 2**

- Do not multitask – do one thing at a time
- Set realistic deadlines for everything
- Prioritize tasks and do not be afraid to re-prioritize when needed
- Remove distractions (eg games or Facebook, etc)
- Keep your mind fresh – take short breaks – stand up
- Do the most complex work in the mornings (most people)
- Diarize
- Specific
- Batch

**What Makes a Good Story?**  **Customer Success Basics**
*what every CSM should know*

- Eventually our hero faces his worst enemy
- Advice is adhered to, so the enemy is defeated
- Our hero has won and can finally rest

An ending
- No longer required, the guide fades away
- The hero is celebrated and praised
- The hero wins their prize and attains their vision

- The hero lives happily ever after
  *Only in stories!*

**PRACTICAL CSM**

# Essential Skills for CS Professionals Course

## Becoming the Best Possible CSM

The basics are the foundations, and now that you have built your foundation, it is time to grow to the next stage and become the best possible CSM that you can be.

In the first section of the Essential Skills for CSMs program, you were introduced to the essential personal skills necessary for a Customer Success Manager to succeed in their role. But now you have learned these skills, how can you put them into practice and start generating value for your customers and (ultimately) for your own company? Becoming the Best Possible CSM discusses how to utilize those skills to drive value – the best way.

- ✓ **Become the Best Possible CSM**
- ✓ **Understand Customer Success Best Practices**
- ✓ **Develop the Right Personal Qualities**
- ✓ **Understand Your Customer**

# Successopedia

The Successopedia is your students' new best friend! Here is where they can look up jargon in our comprehensive glossary of CS-related terminology and get personalized help on any CS-related topic by sending their Customer Success Management-related 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 is based more on new sales revenues and less on renewals revenues and adoption levels from existing product/service sales.

**Activity** +

**ADKAR** +

**Adoption** +

**Adoption Barrier** +

## Ask an Expert

Name*

Email*

Subject*

Category*

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**

**CONTINUING PROFESSIONAL DEVELOPMENT (CPD) & TEAM MANAGEMENT**

# PRACTICAL CSM ACADEMY TEAM MANAGEMENT

- *Progress Health*
- *Time Spent*
- *Certification and CPD Activity*
- *Individual team members progress*
- *Report generation*
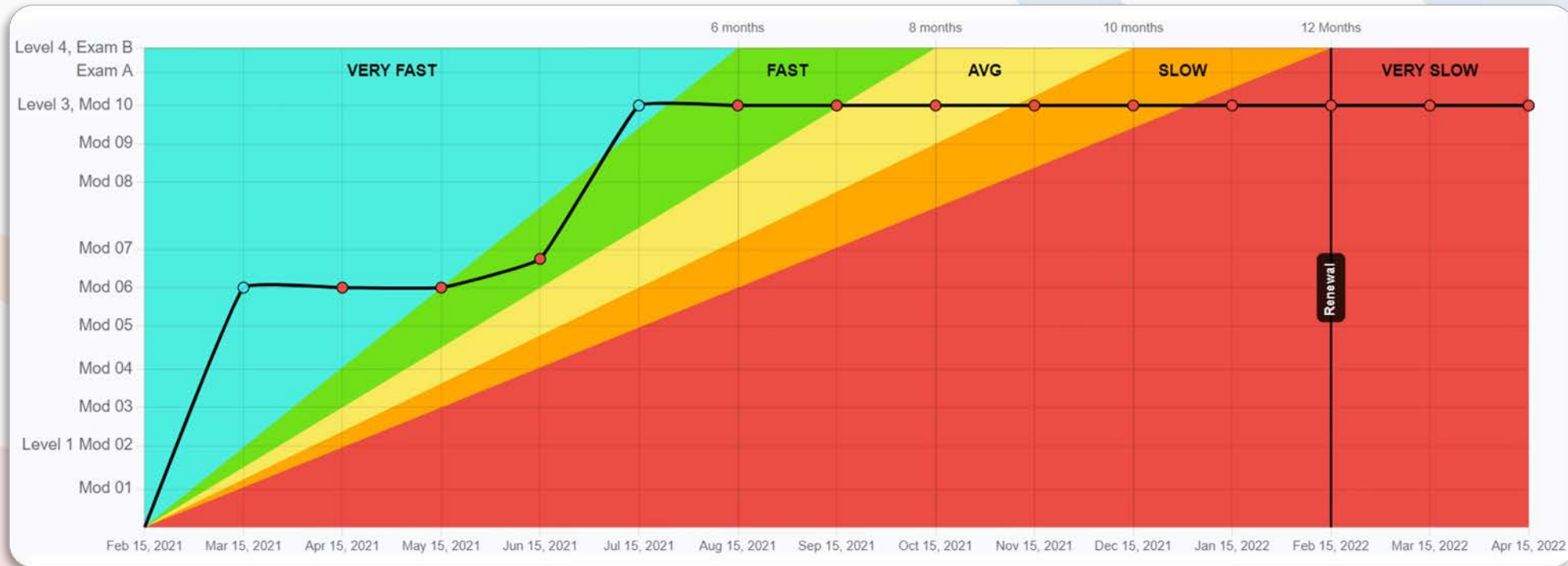- *Learning path assignment\**

*\*new feature coming soon*

# CPD MEMBERSHIPS
*Practical CSM Academy Team Management*

## Progress Speed

Track and monitor the overall progress of your entire team through their Certification Program. Select an individual learner from within your team to drill down into greater detail not just as to how far they have progressed through their certification program, but also how they compare to the average in terms of their progress speed.

# Certification and CPD Activity

As well as graphical representations of progress, the Team Management & Reporting page enables you to see a tabular version of the information, which can also be exported out in CSV format. This tabular information provides you with fingertip control over **all** learning activities including both the formal certification program **and** the continuing professional development components.  Additional administrative information (eg on membership renewals) is also available.

# Individual team members progress & automation

Finally, by selecting an individual team member, our Management interface even allows you to drill down into that teams member's activity logs to see every activity they have done in order with time and date stamps and (where relevant) pass and fail information for tests and exams.

**By request, Practical CSM can also customize your Team Management & Reporting experience to automate the process of receiving regular update reports directly into your inbox.**

# WORKSHOPS / INSTRUCTOR-LED TRAINING
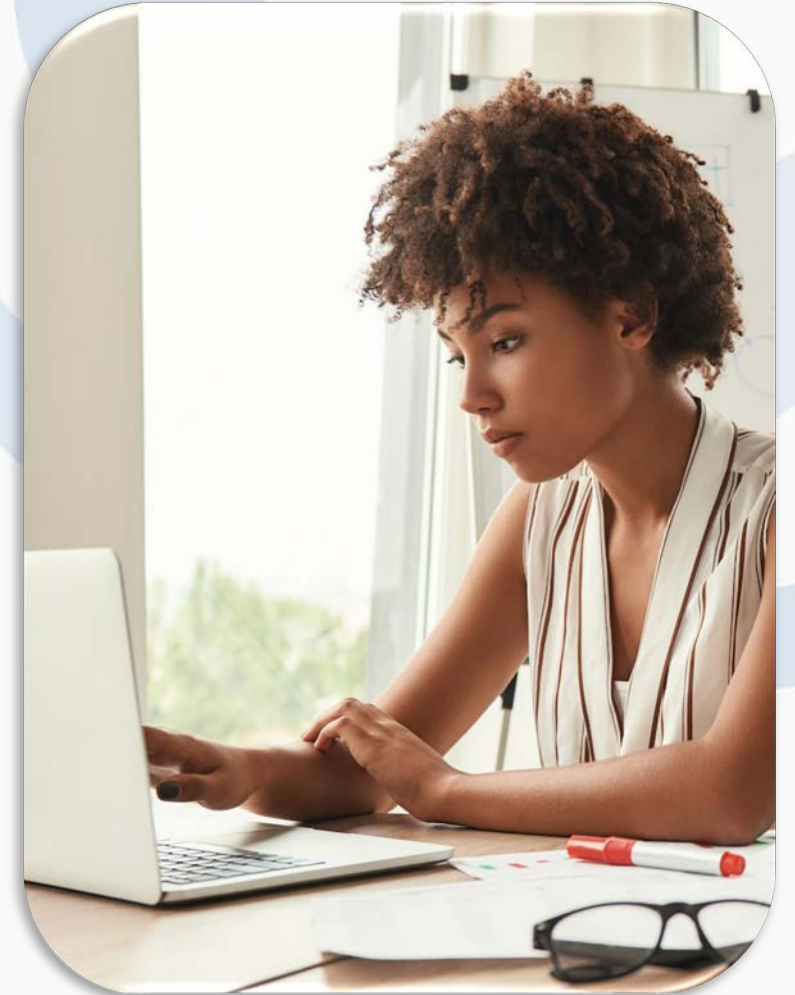
## Instructor-Led Workshops

Some organizations and individuals prefer the online self-study format for their learning experience. However, other teams and individuals prefer to have an instructor-led experience.

Our instructor-led workshops are delivered remotely via the Internet using high-quality video conferencing and learning platforms.

The core advantages of an instructor-led workshop are:

- **Greater engagement levels from learners**

- **The ability to ask questions in real time**

- **The ability to customize the content and/or exercises to suit your team's needs**

- **Feedback from the instructor on team and individual capabilities**

All our instructors are highly experienced and skilled Customer Success Management experts combined with excellent training and communication skills.

# WORKSHOPS / INSTRUCTOR-LED TRAINING

## Standard Training Workshops

Our Standard Training Workshops cover the basic knowledge and skills that the majority of Customer Success management teams will find useful and beneficial in their day-to-day work. These workshops vary in length from 1 hour to 3 days, and can be delivered at short notice whenever you require them.

Benefits include:

- **Covers the fundamentals of Customer Success Management best practice**

- **Ready to go at a moment's notice**

- **Cost effective solution – great for tight budgets**

- **Easy to scale for smallest to largest team sizes**

For longer duration courses, we can divide them into days or half days, and we can deliver each session either back-to-back or over a period of days, weeks or even months.

# WORKSHOPS / INSTRUCTOR-LED TRAINING

## Standard Training Workshop Topics

## The Practical CSM Framework

- PCSM Framework Overview

- Phase 1: Preparation

- Phase 2: Commitment

- Phase 3: Onboarding

- Phases 4 & 5: Adoption Implementation & Adoption Planning

- Phase 6: Value Realization

- Phase 7: Engagement Evaluation

## Skills for CSMs

- Change Management

- Listening & Questioning

- Stakeholder Management

- Data Analysis & Reporting

- Problem Solving

- Leadership & Negotiation

- Time Management

- Meaningful KPIs

- Soft Skills for CSMs

- Influencing Business Decision Makers

- Storytelling Skills

- Dealing with Difficult Stakeholders

- Reports & Presentations

**Clients can "mix and match" the topics they require to create their own unique agenda that covers just those aspects of Customer Success Management that are useful and relevant to them.**

# WORKSHOPS / INSTRUCTOR-LED TRAINING

**Additional Training Workshop Topics**

## Customer Success Leadership

- Modern demands and challenges facing Customer Success

- Research Techniques – what to research and how to go about it

- Assessing Current Capability and Performing Gap Analysis

- Customer Needs and Segments

- CSM Roles and Automation

- Systems and Processes

- Training and Certification

- Coaching and Managing

- Measuring and Evaluating

- Reporting and Collaborating

- Hiring for Capability Gaps

- Team Development

- Scaling & Automation

- Internal Collaboration

- Building Communities

- Creativity & Innovation

- Rewarding & Incentivizing

- Team Culture Dynamics

- Servant Leadership

## Additional Training Workshop Topics

## Jeff Sheehan's Customer Experience Management Field Manual

**Topics:**

- Part I: Attention!

- Part II: The Mission

- Part III: CX Leadership

- Part IV: The Unit: discusses the impact of culture

- Part V: The Inspection

- Part VI: Gathering Intelligence

- Part VII: War Gaming

- Part VIII: The Battle Plan

- Part IX: The Generals

**PRACTICAL CSM**
MAKING CUSTOMER SUCCESS SIMPLE

# CUSTOMER SUCCESS TRAINING STRATEGY

# CUSTOMER SUCCESS TRAINING STRATEGY

## About Our Customer Success Training Strategy Services

Our training company specializes in providing customer success training strategy services. Our team, led by subject matter expert Rick Adams, is **dedicated to helping businesses develop effective strategies for training their employees in customer success**.

Whether you need to create a new training program or improve an existing one, we have the expertise and experience to guide you every step of the way. Our goal is to help you achieve customer success through comprehensive and targeted training strategies that will enable your team to deliver exceptional customer experiences.

We offer a **FREE INITIAL CONSULTATION** to all potential clients with a Customer Success Team of 5 or more (*current or planned this year*).

# CUSTOMER SUCCESS TRAINING CONSULTATION

## About Our Customer Success Training Consultation Services

In addition to helping you develop and implement your Customer Success Training Strategy, we also provide ad hoc consultancy services around all things related to growing, developing, and maturing your Customer Success Team.
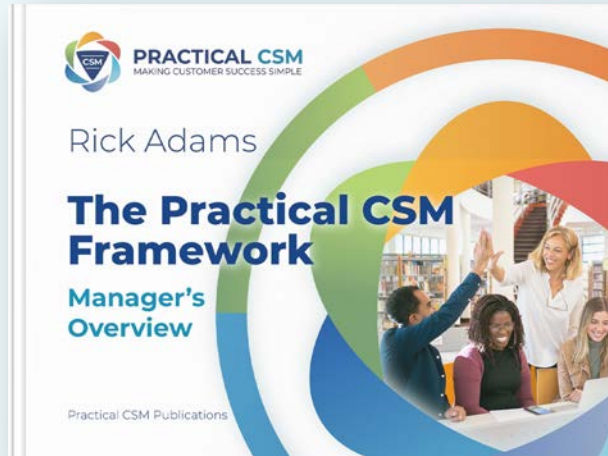
Examples:

- **If you need help to develop your own best practice playbooks or your own training materials**

- **If you need to implement knowledge or skills attainment-based KPIs**

- **If you have to determine a robust staff hiring, development and retention strategy**

# FREE DOWNLOAD FOR ALL CUSTOMER SUCCESS TEAM LEADERS



## The Practical CSM Framework: Manager's Overview

**A guide for Customer Success Leaders in framework implementation**

Is it challenging to put theories into practice? Are you having a hard time following a framework in real-life situations? Out Practical CSM Framework: Manager's Overview explains what it takes to implement and how to do it well.

**DOWNLOAD NOW**

## The Practical CSM Framework: Practitioner's Guide

**A comprehensive structure for Customer Success best practice**

Utilize the Customer Success framework to generate value quickly. Dividing Customer Success engagement into seven phases, the Practical CSM Framework: Practitioner's Overview describes each step and illustrates the best approaches to attain outcomes efficiently.

**DOWNLOAD NOW**
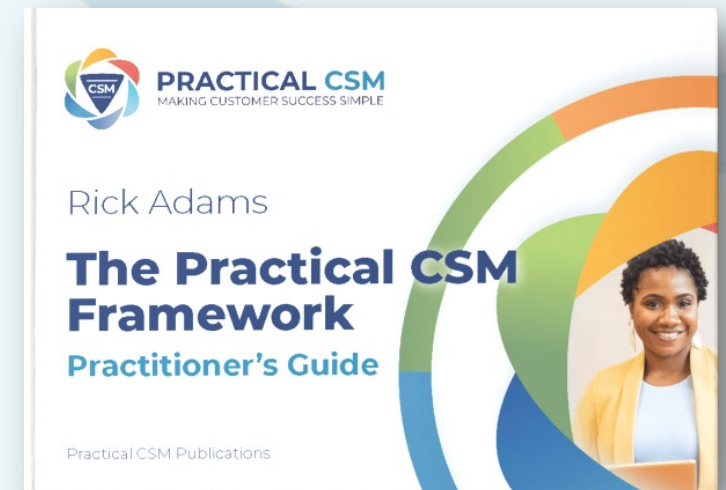
# PRACTICAL CSM
## MAKING CUSTOMER SUCCESS SIMPLE

# Book a FREE consultation

sales@practicalcsm.com