The CSM to Team Lead Transition

Episode 18 Companion Download

This Senior IC Mentoring Toolkit provides the systematic frameworks and assessments discussed in Episode 18: The CSM to Team Lead Transition. Use these resources to evaluate your readiness for mentoring responsibilities, structure effective coaching conversations, document your impact, and build scalable systems that develop talent without burning out. Whether you're stepping into formal team leadership or simply expected to mentor as part of being a senior CSM, these tools will help you make others better while protecting your own capacity and performance.

Part 1: Senior IC Mentoring Readiness Self-Assessment

Before you take on formal or informal mentoring responsibilities, assess your readiness across these five dimensions:

1. Technical Mastery

- ☐ I can consistently execute the core CSM responsibilities (onboarding, QBRs, risk management, renewals) at a high level
- ☐ I have documented processes and templates for my most important workflows
- ☐ I can articulate WHY I do things a certain way, not just HOW
- ☐ I've successfully navigated multiple red accounts to green
- ☐ I can explain my approach to customer success in a way that others can replicate

If you checked 4-5 boxes: You have the technical foundation to mentor others.
If you checked 2-3 boxes: Focus on mastering your own execution first.
If you checked 0-1 boxes: You're not ready to teach others yet.

2. Communication & Coaching Ability

- ☐ I can explain complex concepts in simple terms
- ☐ I ask questions to help people think, rather than just giving answers
- ☐ I can give constructive feedback without damaging relationships
- ☐ I'm comfortable admitting when I don't know something
- ☐ I can adapt my teaching style to different learning preferences

If you checked 4-5 boxes: You have strong coaching fundamentals.
If you checked 2-3 boxes: Practice these skills in low-stakes situations first.
If you checked 0-1 boxes: Work on your communication skills before mentoring.

3. Time & Capacity Management

- ☐ I consistently meet my own performance targets without working excessive hours
- ☐ I have systems that allow me to work efficiently (templates, processes, tools)
- ☐ I can identify and delegate or defer low-priority work
- ☐ I have margin in my schedule for unexpected issues
- ☐ I can protect my time without feeling guilty about saying no

If you checked 4-5 boxes: You have capacity to add mentoring responsibilities.
If you checked 2-3 boxes: Optimize your own workload before taking on more.
If you checked 0-1 boxes: You'll burn out if you add mentoring right now.

4. Documentation & Systems Thinking

- ☐ I've created templates or processes that others on my team use
- ☐ I document solutions to problems so I don't have to solve them repeatedly
- ☐ I think about how to scale solutions beyond just my own accounts
- ☐ I've built resources (guides, checklists, frameworks) that help others
- ☐ I default to creating systems rather than just solving individual problems

If you checked 4-5 boxes: You think like a program builder.
If you checked 2-3 boxes: Start documenting your work more systematically.
If you checked 0-1 boxes: Focus on building your own systems first.

5. Emotional Intelligence & Patience

- ☐ I can stay calm and supportive when someone is struggling
- ☐ I don't get frustrated when people don't learn as quickly as I'd like
- ☐ I can separate someone's current performance from their potential
- ☐ I genuinely want to see others succeed, even if they might surpass me
- ☐ I can give people space to make mistakes and learn from them

If you checked 4-5 boxes: You have the temperament for mentoring.
If you checked 2-3 boxes: Be mindful of patience and emotional regulation.
If you checked 0-1 boxes: Mentoring will be frustrating for both you and your mentees.

Your Overall Readiness Score

20-25 total checks: You're ready to take on mentoring responsibilities.
15-19 total checks: You're close. Focus on your weakest area.
10-14 total checks: Build your own capabilities first.
Below 10 checks: Not ready yet. That's okay.

Part 2: The Four-Step Coaching Framework

Use this framework for every coaching conversation to help people develop their own problem-solving skills:

Step 1: Situation

Ask: "Walk me through what's happening. What's the challenge you're facing?"

Your Goal: Understand the full context without jumping to solutions.

Listen for:

- What's the actual problem vs. the perceived problem?
- What's been tried already?
- What constraints exist?
- Who else is involved?

Avoid: Interrupting with your own story or immediately offering advice.

Step 2: Options

Ask: "What options have you considered? What are the different ways you could approach this?"

Your Goal: Get them thinking through multiple approaches.

If they're stuck, prompt with:

- "What would you do if you had unlimited resources?"
- "What would [respected colleague] do in this situation?"
- "What's the riskiest approach? The safest? What's in between?"
- "If this were a customer you'd already lost, what would you try?"

Avoid: Listing all the options yourself. Make them generate at least 2-3 ideas first.

Step 3: Recommendation

Ask: "Based on what you've said, which option do you think is best? Why?"

Your Goal: Help them build decision-making confidence.

If their recommendation is solid:

- Affirm it: "I think that's the right call. Here's why..."
- Add any considerations they might have missed
- Help them strengthen their plan

If their recommendation has gaps:

- Ask probing questions: "What happens if [scenario]?"
- Point out blind spots: "Have you considered [factor]?"
- Share relevant experience: "When I faced something similar, here's what I learned..."

Avoid: Overriding their decision just because you'd do it differently. Sometimes good enough is good enough.

Step 4: Next Steps

Ask: "What specifically are you going to do next, and when?"

Your Goal: Convert the conversation into action with accountability.

Ensure they define:

- Specific action (not "think about it" or "look into it")
- Owner (usually them, but clarify)
- Deadline (specific date/time)
- How they'll know it's complete
- When they'll update you on progress

Template: "I'm going to [SPECIFIC ACTION] by [DATE]. I'll know it's complete when [OUTCOME]. I'll update you on [WHEN]."

Avoid: Leaving the conversation without clear next steps and accountability.

Part 3: One-on-One Meeting Template

Use this structure for recurring coaching conversations with people you're mentoring:

Before the Meeting (5 minutes)

Review:

- Notes from last one-on-one
- Their current accounts/projects
- Any recent wins or challenges you've observed
- Outstanding action items from previous conversation

Opening (5 minutes)

Start with: "How are you doing? What's top of mind for you right now?"

Look for:

- Energy level and morale
- What they're excited about
- What's causing stress
- What they want to talk about vs. what you planned

Note: Sometimes the best coaching happens when you abandon your agenda and follow their energy.

Main Discussion (35-40 minutes)

Option A: Problem-Solving Session Use the Four-Step Coaching Framework (Situation → Options → Recommendation → Next Steps)

Option B: Skill Development

- Pick one specific skill to work on
- Review recent example where they used (or should have used) that skill
- Discuss what worked, what didn't
- Practice or role-play if relevant
- Define how they'll apply it in the next week

Option C: Account/Portfolio Review

- Walk through their book of business
- Identify risks and opportunities
- Discuss prioritization
- Coach on specific customer situations
- Align on strategy

Option D: Career Development

- Discuss their goals (3 months, 6 months, 1 year)
- Identify skills they need to build
- Review progress on development objectives
- Discuss opportunities to gain new experience
- Address any concerns about growth

Closing (5 minutes)

Summarize:

- Key decisions made
- Action items with owners and deadlines
- What you'll follow up on
- When you'll meet next

Ask: "What was most helpful about this conversation? What did I miss?"

After the Meeting (5 minutes)

Document:

- Date and key topics discussed
- Action items and deadlines
- Commitments you made
- Important context for next time
- Trends you're observing (improvement areas, growth, concerns)

Why this matters: These notes become essential for performance reviews, promotion discussions, and demonstrating your mentoring impact.

Part 4: Mentoring Time Boundaries Worksheet

Protect your capacity while still being an effective mentor.

Calculate Your Available Mentoring Time

Step 1: Calculate your current workload

- Customer-facing time per week: _____ hours
- Internal meetings per week: _____ hours
- Administrative work per week: _____ hours
- Total committed time: _____ hours

Step 2: Determine sustainable total hours

- Sustainable work week (typically 40-45 hours): _____ hours
- Minus total committed time: _____ hours
- Available capacity: _____ hours

Step 3: Allocate mentoring time

- Available capacity x 0.5 = Max mentoring time: _____ hours (Never allocate more than 50% of available capacity to mentoring)

Step 4: Calculate per-mentee time

- Number of people you're mentoring: _____
- Max mentoring time ÷ number of mentees: _____ hours per person

Reality check:

- New CSMs typically need 2-3 hours/week of mentoring
- Experienced CSMs typically need 1 hour/week
- If your math doesn't support these minimums, you're taking on too many mentees

Set Clear Boundaries

Communicate these expectations upfront:

Scheduled Time: "We'll meet [FREQUENCY] for [DURATION]. I'll send calendar invites for the next month so you can plan around them."

Response Time: "If you message me with a question, I'll respond within [TIMEFRAME, e.g., 24 hours]. If it's truly urgent and customer-impacting, call me. Otherwise, it can wait for our next one-on-one."

Scope of Support: "I'm here to help you with [SPECIFIC AREAS, e.g., customer strategy, risk management, EBR prep]. For [OTHER AREAS, e.g., technical product questions, HR issues], you should connect with [APPROPRIATE RESOURCE]."

Problem-Solving Approach: "When you bring me a problem, I'm going to ask you what you've already tried and what you think we should do. I'm not here to solve everything for you. I'm here to help you become a better problem-solver."

Preparation Expectations: "Come to our one-on-ones with specific topics you want to discuss. Send me your agenda 24 hours in advance so I can prepare. If you don't send an agenda, we'll use that time for me to ask you questions about your accounts."

Red Flags That You're Over-Committed

- ☐ You're regularly working evenings/weekends to keep up
- ☐ You're canceling or rescheduling one-on-ones frequently
- ☐ You're providing surface-level feedback because you don't have time to be thorough
- ☐ Your own account performance is slipping
- ☐ You're feeling resentful about mentoring time
- ☐ People are coming to you for everything instead of developing independence
- ☐ You haven't had time to document anything you're teaching

If you checked 3+ boxes: You need to reduce your mentoring load or optimize how you're spending mentoring time.

Part 5: Documentation System for Scaling Your Impact

Don't make people dependent on your availability. Build resources that scale.

Level 1: Answer Bank (Start Here)

When someone asks you a question:

1. Answer the question
2. Document your answer in a shared location (Google Doc, Notion, Wiki)
3. Next time someone asks the same question, send them the documented answer
4. Update the documentation based on new situations

Categories to build:

- Common customer objections and how to handle them
- How to navigate internal processes (Salesforce, ticketing, approvals)
- Templates and examples (email templates, QBR decks, risk escalations)
- Troubleshooting guides for common issues
- Best practices for specific situations

Storage: Create a simple folder structure:

```
CSM Knowledge Base/
├── Customer Conversations/
├── Internal Processes/
├── Templates/
├── Troubleshooting/
└── Best Practices/
```

Level 2: Process Documentation

For any repeatable process, document:

What: Name of the process (e.g., "How to Run Your First EBR")

When: When to use this process (e.g., "60-90 days after customer go-live")

Why: Purpose and expected outcome (e.g., "Align on success metrics, identify risks, build executive relationship")

Who: Who's involved and their roles (e.g., "CSM leads, Account Executive attends, Customer exec sponsor required")

How: Step-by-step instructions

1. [First step with specifics]
2. [Second step with specifics]
3. [Continue...]

Resources: Links to templates, examples, related documentation

Tips: Common mistakes to avoid, pro tips, variations for different situations

Example: [Link to actual example or case study]

Level 3: Onboarding Curriculum

If you're mentoring multiple people over time, build a structured onboarding path:

Week 1: Foundations

- Reading: [Company CS philosophy, product overview, customer journey]
- Templates: [Core templates they'll use]
- Shadowing: [Sit in on 3-5 customer calls with you]
- First assignment: [Something small to build confidence]

Week 2-4: Guided Practice

- Skills: [Specific skills to focus on, e.g., running a check-in call]
- Practice: [Role-play or co-deliver with you]
- Solo work: [First customer interactions with you in background]
- Check-ins: [Daily or every-other-day coaching]

Week 5-8: Supervised Independence

- Ownership: [Take on first 2-3 accounts solo]
- You: [Review their work, debrief calls, course-correct]
- Documentation: [They document their own processes]
- Expanding scope: [Add more accounts or complexity]

Week 9-12: Independence with Support

- Full portfolio: [Standard account load]
- Check-ins: [Weekly one-on-ones]
- Escalation path: [Clear criteria for when to pull you in]
- Reflection: [What's working, what do they still need to develop]

Level 4: Case Study Library

Turn your experiences into teaching tools:

Format: Situation: [What was the challenge? What made it difficult?]

Approach: [What did you do? What was your thinking?]

Outcome: [What happened? What were the results?]

Lessons: [What did you learn? What would you do differently? What principles apply to other situations?]

Examples to document:

- Successful red account turnarounds
- Effective expansion conversations
- How you've handled difficult customer situations
- Internal escalations that got results
- EBRs that went really well (or really poorly)
- Mistakes and what you learned from them

Why this matters: Case studies let people learn from your experience without having to live through every situation themselves.

Part 6: Proving Your Mentoring Impact

Document your mentoring work so it's visible when promotion/compensation discussions happen.

Track These Metrics

Mentee Performance:

- Retention rates of customers managed by your mentees
- Expansion revenue generated by your mentees
- Customer satisfaction scores for your mentees' accounts
- Time-to-productivity for people you've onboarded (vs. average)

Mentee Development:

- Skills developed (list specific competencies)
- Promotions earned by people you've mentored
- Accounts successfully transitioned to your mentees
- Feedback from your mentees (quotes, testimonials)

Program Building:

- Resources created (number of templates, guides, processes documented)
- Usage of your resources (how many people use them, how often)
- Time saved (estimate hours saved across team through your documentation)
- Adoption across team (what percentage of team uses your frameworks)

Leadership Recognition:

- Requests to mentor additional people
- Invitations to lead training or present best practices
- References in team meetings or leadership discussions
- Formal or informal recognition from management

Quarterly Documentation Template

At the end of each quarter, document:

People I Mentored:

- [Name], [Level], [Duration], [Key outcomes]
- [Name], [Level], [Duration], [Key outcomes]

Development Impact:

- [Mentee name] improved [specific skill] from [before state] to [after state]
- [Mentee name] was promoted from [role] to [role] after [timeframe]
- [Mentee name] successfully [major accomplishment, e.g., "saved their first red account"]

Resources Created:

- [Template/guide name]: [usage stats or impact]
- [Process documentation]: [who uses it, what problem it solves]
- [Training content]: [who consumed it, what improved]

Time Investment:

- Total mentoring hours: [estimated]
- One-on-ones conducted: [number]
- Training sessions led: [number]

Business Impact:

- Accounts managed by my mentees: [total ARR]
- Retention rate: [percentage]
- Expansion generated: [dollar amount]
- Customer satisfaction: [average score or improvement]

Quotes/Feedback: "[Specific feedback from mentee, manager, or leadership]"

How to Talk About This Work

In performance reviews: "I mentored [number] CSMs this year, creating [number] resources that the entire team now uses. The CSMs I've worked with manage [ARR amount] with a [X%] retention rate, and [number] have been promoted during or after our mentoring relationship."

In promotion discussions: "In addition to managing my own portfolio of [ARR], I've scaled my impact by developing [number] team members and creating documentation that's reduced onboarding time by [X%]. I'm operating at a senior level not just in my own execution, but in building team capacity."

In job interviews: "At [company], I built the CSM onboarding program from scratch, which reduced time-to-productivity from [X weeks] to [Y weeks]. I mentored [number] CSMs, [number] of whom were promoted within [timeframe]. I also created [number] templates and frameworks that became standard across the team."

Part 7: When to Say No to Mentoring Requests

Not every mentoring opportunity is worth your time. Here's how to evaluate:

Say YES if:

- The person is genuinely committed to learning (not just looking for someone to do their work)
- You have the capacity to do it well (not just squeeze it in)
- The relationship will develop skills you want to build (teaching, coaching, program design)
- There's organizational support (your manager knows and values this work)
- The time investment is bounded (clear start/end, defined scope)
- You'll learn something too (teaching forces you to clarify your own thinking)

Say NO (or negotiate) if:

- You're already maxed out on your own performance
- The person isn't willing to do the work themselves
- There's no clear scope or end date
- You're being voluntold without compensation or recognition
- The person really needs a manager, not a mentor
- You don't have the expertise they need
- It will damage your own performance or wellbeing

How to Say No Professionally

Option 1: Redirect "I don't have capacity to take on another mentee right now, but [colleague name] is excellent at [relevant skill] and might be able to help. Want me to introduce you?"

Option 2: Defer "I'm maxed out through [timeframe], but I'd be open to connecting in [specific future time] if you're still looking for mentoring then."

Option 3: Narrow the Scope "I can't commit to ongoing mentoring right now, but I'd be happy to have one conversation about [specific topic] if that would help."

Option 4: Group Alternative "I can't do individual mentoring, but I'm planning to create [resource/training/documentation] on this topic. Would that be helpful?"

Option 5: Honest Boundary "I need to focus on my own accounts right now. I don't have the capacity to mentor anyone new and do it well."

Part 8: The Senior IC Development Path

You don't need to become a manager to grow. Here's what "senior" looks like for high-impact ICs:

Senior CSM (Individual Contributor)

Core Responsibilities:

- Manage high-complexity, high-value accounts ($500K+ ARR per account)
- Own strategic customer relationships at executive level
- Drive significant expansion revenue
- Navigate complex, multi-stakeholder environments

Leadership Responsibilities (without managing people):

- Mentor 1-3 junior/mid-level CSMs
- Create and maintain team resources (templates, playbooks, processes)
- Contribute to CS strategy and process improvement
- Represent CS in cross-functional strategic initiatives
- Lead training or enablement sessions
- Serve as escalation point for complex customer situations

Impact Metrics:

- Personal book of business performance (retention, expansion, CSAT)
- Mentee development outcomes
- Resources created and adoption rates
- Cross-functional influence and strategic contributions

Compensation Range: $120K-$160K base + significant equity + performance bonuses

Principal CSM or CS Architect (Advanced IC)

Core Responsibilities:

- Manage highest-value accounts or most complex/strategic customer segments
- Own customer success methodology and program design
- Drive company-wide CS initiatives
- Serve as internal CS expert and thought leader

Leadership Responsibilities:

- Design and build CS programs (onboarding, health scoring, risk management)
- Create CS enablement curriculum for entire team
- Lead cross-functional initiatives (product feedback loops, customer advisory boards)
- Mentor multiple CSMs and potentially CS managers
- Represent CS externally (conferences, content, industry leadership)
- Consult on complex customer situations across all CSM portfolios

Impact Metrics:

- Strategic account outcomes
- Program adoption and effectiveness
- Team capability improvement
- External recognition and thought leadership
- Business impact of initiatives led

Compensation Range: $150K-$200K+ base + substantial equity + performance bonuses

Key Difference from Management Track:

- Managers own team performance and people development as their primary job
- Principal ICs own programs and methodology while still managing strategic customers
- Managers hire, fire, and do performance reviews
- Principal ICs mentor, enable, and influence without formal authority
- Both paths are valuable; choose based on what energizes you

Part 9: Action Plan

Based on this episode and companion guide, what are you going to do next?

This Week:

1. **Complete the Mentoring Readiness Self-Assessment** (Part 1)
   - Score: _____
   - Biggest gap: _____
   - One action to improve: _____
2. **If you're currently mentoring someone, schedule your next one-on-one**
   - When: _____
   - Agenda: _____
   - Framework to use: _____
3. **Document one thing you know how to do well**
   - What: _____
   - Where you'll document it: _____
   - Who will benefit: _____

This Month:

1. **Create or refine one mentoring resource**
   - Resource type: _____
   - Purpose: _____
   - Completion date: _____
2. **Set clear boundaries around your mentoring time**
   - Hours per week available: _____
   - Communication expectations: _____
   - Share with mentees by: _____
3. **Document your mentoring impact**
   - Metrics to track: _____
   - How you'll track them: _____
   - When you'll review: _____

This Quarter:

1. **Evaluate whether mentoring is the right path for you**
   - Do you enjoy it? _____
   - Are you getting better at it? _____
   - Is it recognized/valued? _____
   - Does it align with your goals? _____
2. **Build one systematic resource that scales beyond you**
   - What you'll build: _____
   - Who it will help: _____
   - Completion target: _____
3. **Have a conversation with your manager about development**
   - Topics to discuss:
     - Your mentoring work and impact
     - How this fits into your career path
     - What support/recognition looks like
     - Whether this should be formalized
   - Schedule by: _____

Recommended Reading:

- "The Coaching Habit" by Michael Bungay Stanier (asking better questions)
- "Thanks for the Feedback" by Douglas Stone & Sheila Heen (giving and receiving feedback)
- "Multipliers" by Liz Wiseman (how leaders make everyone smarter)
- "The Manager's Path" by Camille Fournier (even if you're not managing, understand what good leadership looks like)

Final Thought

Developing people is one of the most valuable skills you can build as a senior CSM. Not because you have to become a manager. But because the best senior ICs don't just execute well themselves - they make everyone around them better.

You don't need a title to do that. You need systems, patience, and a genuine commitment to building others up.

Start small. Document one thing. Mentor one person. Build one resource.

That's how you go from being a good CSM to being the kind of senior IC that companies fight to keep and competitors try to recruit.

Now go do the work.

Next Steps and Resources

This guide is part of The CSM Career Ladder mini-series on ClearPath Conversations:

- **Episode 18:** The CSM to Team Lead Transition
- **Episode 19:** Internal Advocacy: How to Get Credit Without Bragging
- **Episode 20:** How to Handle Burnout in CS

Additional Resources:

- *ClearPath CX Website:* Templates, frameworks, and resources at ClearPathCX.com
- *LinkedIn:* Connect with Mark at linkedin.com/in/markbernardin