

The Internal CS Playbook You Wish You Had

Episode 24 Companion Download

This companion resource gives you the building blocks for creating your own internal CS playbook. Whether you're a solo CSM documenting your process for the first time or a team lead standardizing how your organization operates, these templates will save you from starting with a blank page. Use them as-is, adapt them to your company's context, or treat them as inspiration for building something even better. The goal isn't perfection. The goal is documentation that actually gets used.

Template 1: New Hire Onboarding Deck Outline

Use this structure to create your team's onboarding presentation. Aim for 15-20 slides maximum.

Slide 1: Our CS Mission

What does Customer Success mean at this company specifically? Define the purpose in one clear sentence.

Example: "We ensure customers achieve measurable security outcomes while building long-term partnerships that drive retention and expansion."

Your mission:

Slide 2: Team Structure & Key Contacts

- Who's on the CS team and what are their roles?
- Who handles renewals, implementation, escalations?
- Key cross-functional partners (Sales, Support, Product, Engineering)

Slide 3: The Customer Journey

Map out your customer lifecycle with phases, timelines, and outcomes.

Phase	Timeline	Key Activities	Success Criteria
Post-Sale Handoff	Days 1-5		
Onboarding	Weeks 1-8		
Adoption	Months 2-6		
Renewal	90 days before		
Expansion	Ongoing		

Slide 4: Tools & Systems

Where does information live? What systems do CSMs use daily?

- CRM Platform:
- CS Platform:
- Communication Tools:
- Documentation Location:
- Data/Analytics Access:

Slide 5: Key Metrics We Track

What does leadership care about? How do individual CSMs contribute?

Team Metrics:

- Net Revenue Retention (NRR): _____%
- Gross Retention Rate: _____%
- Expansion Revenue: \$_____
- Customer Health Score: _____

Individual CSM Metrics:

- Portfolio retention: _____%
- QBR completion rate: _____%
- Time to first value: _____ days

Slide 6: First 30-60-90 Day Plan

Month 1 Expectations:

- Complete product training
- Shadow 5 customer calls
- Review all account handoff documentation
- Learn escalation process
- Meet with Sales, Support, Product counterparts

Month 2 Expectations:

- Take ownership of 3-5 accounts
- Run first customer QBR with manager shadowing
- Complete first account health assessment
- Participate in renewal planning

Month 3 Expectations:

- Full portfolio ownership
- Lead first renewal conversation
- Identify and present first expansion opportunity
- Contribute to team knowledge base

Template 2: Core Runbooks

Runbook A: Account Handoff Process (Sales to CS)

Trigger: Deal closes in CRM

Timeline: Complete within 5 business days of close

Step 1: Within 24 hours of close

Owner: Assigned CSM

Actions:

- Review all sales notes, recorded calls, and contract terms
- Document customer's stated goals and success criteria
- Identify key stakeholders and decision makers
- Note any special commitments, pricing, or timelines

Step 2: Within 48 hours of close

Owner: Assigned CSM

Actions:

- Schedule kickoff call (target: within 5 business days)
- Prepare success plan template pre-filled with customer goals
- Send internal handoff summary to Sales rep
- Create customer record in CS platform

Step 3: Before kickoff call

Owner: Assigned CSM

Actions:

- Send kickoff agenda to customer
- Confirm technical requirements gathered
- Prepare implementation timeline
- Coordinate with any additional teams (implementation, support)

Step 4: Kickoff call agenda (60 minutes)

- Introductions and role clarity (10 min)
- Review customer's business objectives (15 min)
- Walk through implementation timeline (15 min)
- Establish communication cadence (10 min)
- Q&A and next steps (10 min)

Step 5: Within 24 hours post-kickoff

Owner: Assigned CSM

Actions:

- Send written recap email with action items and owners
- Update CRM with next milestones
- Schedule next touchpoint
- Flag any concerns or risks identified

Runbook B: Escalation Workflow

Tier 1: CSM-Owned Escalation

Criteria:

- Issue can be resolved with existing resources
- Does not threaten renewal or expansion
- Customer sentiment remains neutral or positive

Actions:

- Document issue in risk log
- Communicate expected resolution timeline to customer
- Loop in appropriate internal team (Support, Product, Engineering)
- Provide weekly status updates until resolved
- Send resolution confirmation to customer

Timeline: Resolve within 2 weeks or escalate to Tier 2

Tier 2: Manager Involvement

Criteria:

- Issue requires cross-functional coordination
- Customer sentiment declining
- Potential revenue impact
- Escalation from customer to CSM's manager

Actions:

- CSM briefs manager with written summary
- Manager joins next customer call
- Manager coordinates internal response team
- Manager approves any commitments or timeline changes
- CSM maintains day-to-day communication

Timeline: Resolve within 4 weeks or escalate to Tier 3

Tier 3: Executive Escalation

Criteria:

- Customer has escalated to your executive team
- Imminent churn risk
- Legal or contract dispute
- Requires executive decision-making authority

Actions:

- Manager briefs VP/executive immediately
- Executive-to-executive communication initiated
- War room assembled (CS, Sales, Product, Legal as needed)
- Daily status updates to all stakeholders
- Formal resolution plan documented and approved

Communication Protocol:

- Customer receives update every 48 hours minimum
- Internal stakeholders updated every 24 hours
- All commitments documented in writing
- Post-resolution debrief completed within 1 week

Runbook C: Renewal Preparation (90-Day Process)

Day 90 Before Renewal

Owner: CSM

- Review account health across all dimensions
- Pull usage data and adoption metrics
- Assess stakeholder engagement and sentiment
- Document business outcomes achieved
- Identify any open risks or concerns

Day 75 Before Renewal

Owner: CSM + Sales

- Schedule renewal planning call with Sales counterpart
- Align on renewal strategy and pricing approach
- Discuss potential expansion opportunities
- Identify decision-making timeline

Day 60 Before Renewal

Owner: CSM

- Deliver internal renewal forecast
- Complete risk assessment (green/yellow/red)
- Flag any potential obstacles
- Request resources if needed (discount approval, executive involvement)

Day 45 Before Renewal

Owner: CSM

- Schedule Executive Business Review with customer
- Prepare EBR deck showing value delivered
- Include future roadmap alignment
- Position renewal conversation

Day 30 Before Renewal

Owner: Sales (with CSM support)

- Sales presents renewal terms to customer
- CSM addresses any product/technical questions
- Document customer's response and concerns

Day 15 Before Renewal

Owner: CSM + Sales

- Follow up on any outstanding concerns
- Confirm stakeholder alignment
- Address final objections or questions
- Verify contracting timeline

Renewal Date

- Contract signed and executed, OR
- Extension negotiated with clear timeline, OR
- Escalation path activated for at-risk renewals

Post-Renewal (within 7 days)

- Thank you message to customer stakeholders
- Internal debrief: what worked, what didn't
- Update account plan with expansion opportunities
- Document lessons learned

Template 3: Health Scorecard Framework

Account Name: _____

CSM Owner: _____

Last Updated: _____

Dimension 1: Product Adoption

Score: Green Yellow Red

Indicators:

- Using features purchased? (Y/N)
- Using features correctly? (Y/N)
- Integrated with other systems? (Y/N)
- End users trained? (Y/N)
- Usage trending up, flat, or down?

Current Status:

Dimension 2: Business Outcomes

Score: Green Yellow Red

Indicators:

- Achieving stated goals? (Y/N)
- Can quantify/prove results? (Y/N)
- Customer acknowledges value? (Y/N)

Success Metrics Documented at Kickoff:

1. _____

2. _____

3. _____

Progress Against Metrics:

Dimension 3: Stakeholder Engagement

Score: Green Yellow Red

Indicators:

- Number of active stakeholders: _____
- Access to economic buyer? (Y/N)
- Relationships across departments? (Y/N)
- Champion identified? (Y/N)

Stakeholder Map:

Name	Title	Department	Engagement Level (High/Medium/Low)

DIMENSION 4: SENTIMENT

Score: Green Yellow Red

Indicators:

- Responsive to outreach? (Y/N)
- Enthusiastic in meetings? (Y/N)
- Referring us internally? (Y/N)
- Tone of recent communications: _____

Recent Sentiment Signals:

DIMENSION 5: RISK FACTORS

Score: Green Yellow Red

Check all that apply:

- Open technical issues
- Unresolved escalations
- Budget concerns expressed
- Competitive evaluation in progress
- Key stakeholder departed
- Company restructuring/layoffs
- Contract up for renewal within 90 days
- Low/declining usage
- Negative feedback in support tickets
- Other: _____
- Other: _____
- Other: _____
- Other: _____

Active Risks:

COMPOSITE HEALTH SCORE

Overall Account Health: Green Yellow Red

Rationale:

Action Plan Based on Score:

IF GREEN:

- Schedule quarterly business review
- Explore expansion opportunities
- Request customer reference/case study
- Maintain standard cadence

IF YELLOW:

- Increase touchpoint frequency
- Proactive issue resolution
- Stakeholder alignment check
- Document stabilization plan

IF RED:

- Create formal get-well plan
- Activate cross-functional support
- Executive engagement as needed
- Weekly internal status reviews

Template 4: Risk Log

Use this template to track every issue, escalation, and concern. Update weekly.

Risk ID	Customer	Risk Description	Severity	Owner	Status	Target Resolution	Actions Taken	Last Updated
001	[Account name]	[Specific issue description]	Critical/ High/ Medium/ Low	[Name]	Open/In Progress/ Blocked/ Resolved	[Date]	[What's been done]	[Date]
002								
003								

Severity Definitions:

- Critical: Immediate threat to renewal. Executive escalation. Customer actively evaluating alternatives.
- High: Could escalate to critical if not addressed. Significant customer dissatisfaction. Revenue impact possible.
- Medium: Needs attention but not urgent. Customer aware and patient. Workable timeline.
- Low: Monitoring only. Minor issue. No immediate action required.

Status Definitions:

- Open: Issue identified but not yet being actively worked
- In Progress: Action plan in place and being executed
- Blocked: Cannot proceed without external dependency (e.g., Product decision, customer input)
- Resolved: Issue closed and confirmed by customer

Weekly Risk Log Review Process:

Every Friday at 3 PM:

1. Review all open risks
2. Update status on in-progress items
3. Escalate any items past target resolution date
4. Add new risks identified during the week
5. Archive resolved items
6. Share summary with manager

Implementation Checklist

Use this checklist to build your internal CS playbook:

- Week 1: Audit What Documentation Currently Exists
- Week 1: Identify Biggest Gaps (What Questions Come Up Repeatedly?)
- Week 2: Create Onboarding Deck Outline
- Week 2: Draft First Runbook (Start with Account Handoff)
- Week 3: Build Health Scorecard Framework
- Week 3: Set Up Risk Log Template
- Week 4: Get Feedback from Teammates
- Week 4: Refine Based on How People Actually Work
- Week 5: Share with Manager for Buy-In
- Week 5: Establish Update Cadence (Monthly Review/Refinement)
- Ongoing: Keep Documentation Current as Processes Evolve

Final Thoughts

Remember: the perfect playbook that sits in a Google Drive and never gets used is worthless. The good-enough playbook that your team references every week is invaluable.

Start with one piece. Build it. Use it. Refine it. Then move to the next.

Next Steps and Resources

This guide is part of The CS Strategy mini-series on ClearPath Conversations:

- **Episode 24:** The Internal CS Playbook You Wish You Had
- **Episode 25:** Building Your Personal CS Brand (Without Being Cringe)
- **Episode 26:** Customer Success Metrics That Actually Matter
- **Episode 27:** What Makes a CSM *Great*? My Non-Negotiables

Additional Resources:

- *ClearPath CX Website:* Templates, frameworks, and resources at [ClearPathCX.com](https://clearpathcx.com)
- *LinkedIn:* Connect with Mark at [linkedin.com/in/markbernardin](https://www.linkedin.com/in/markbernardin)