

What Makes a CSM Great? My Non-Negotiables

Episode 27 Companion Download

This Non-Negotiables Self-Assessment and Action Planner provides the frameworks and evaluation tools discussed in Episode 27 of ClearPath Conversations. Use these resources to honestly assess where you stand across the seven traits that separate good CSMs from great ones, identify your highest-priority development areas, and build a 30-day plan for targeted improvement. Whether you're early in your CS career or a seasoned enterprise CSM looking to sharpen your edge, this toolkit will help you turn reflection into action.

The Seven Non-Negotiables at a Glance

1. **Ownership** - You own the outcome, not just the tasks. You don't wait for direction. You anticipate, plan, and act before anyone asks.
2. **Curiosity** - You dig deeper than surface-level requests. You research your customers' businesses, ask why, and uncover opportunities others miss.
3. **Calm Under Pressure** - You regulate yourself before you try to regulate the room. In high-stakes moments, you lead with facts, not emotion.
4. **Follow-Through** - You never rely on memory to track commitments. Every promise has a system behind it, and nothing slips through the cracks.
5. **Strategic Thinking** - You prioritize based on business impact, not noise. You track what's likely to happen next, not just what's happening now.
6. **Emotional Intelligence** - You read the room, adapt your approach, and protect your own energy. You know when to push and when to pause.
7. **Storytelling** - You turn data and outcomes into narratives that move people to action, both externally with customers and internally with your own organization.

Self-Assessment: Rate Yourself Honestly

For each non-negotiable, rate yourself on a scale of 1 to 5 using the criteria below. Be honest. This isn't a performance review. It's a development tool.

- 1 = This is a consistent gap for me
- 2 = I do this occasionally but not reliably
- 3 = I'm competent here but have room to grow
- 4 = This is a strength I demonstrate regularly
- 5 = This is a defining trait of how I operate

Ownership

I proactively identify risks and opportunities before being asked: _____

I build account plans and success plans without waiting for direction: _____

I stay involved in issues I've escalated until they're fully resolved: _____

I know the difference between owning the outcome and owning everything: _____

Ownership Score (average of 4 items): _____

Curiosity

I research my customers' businesses before every significant meeting: _____

When a customer makes a request, I ask why before jumping to action: _____

I stay informed about my customers' industries, competitors, and org changes: _____

I understand how my own internal teams (e.g. Product, Sales, Support) operate and prioritize: _____

Curiosity Score (average of 4 items): _____

Calm Under Pressure

In escalations, I lead with facts and solution-oriented language: _____

I can diffuse a heated conversation without dismissing the customer's frustration: _____

I prepare for difficult meetings by anticipating objections and emotional dynamics: _____

My colleagues and customers would describe me as composed under stress: _____

Calm Under Pressure Score (average of 4 items): _____

Follow-Through

I use an external system (not my memory) to track every customer commitment: _____

Every commitment I make includes a clear deliverable, owner, and deadline: _____

I follow up on internal requests I've made until I have a confirmed outcome: _____

I communicate proactively when a commitment is at risk of being delayed: _____

Follow-Through Score (average of 4 items): _____

Strategic Thinking

I prioritize my portfolio based on business impact and risk, not just volume or urgency: _____

I maintain a forward-looking view of my accounts (renewals, stakeholder changes, product updates): _____

I can explain why I spent my time the way I did last week in strategic terms: _____

I know when to invest more in an account and when to step back: _____

Strategic Thinking Score (average of 4 items): _____

Emotional Intelligence

I can sense when a stakeholder is disengaging before they tell me directly: _____

I adjust my communication style based on the audience (technical vs. executive, etc.): _____

I set boundaries to protect my energy and prevent burnout: _____

I can deliver difficult news without damaging the relationship: _____

Emotional Intelligence Score (average of 4 items): _____

Storytelling

I frame EBRs and account updates as narratives, not data dumps: _____

When I need internal resources, I make the business case with context and impact: _____

I document my wins in a way that quantifies business outcomes (ARR saved, time to health, expansion revenue): _____

I can explain the value I've delivered to a customer in two sentences or less: _____

Storytelling Score (average of 4 items): _____

Scoring Summary

Transfer your scores here to see the full picture.

Non-Negotiable	Score (1-5)
Ownership	
Curiosity	
Calm Under Pressure	
Follow-Through	
Strategic Thinking	
Emotional Intelligence	
Storytelling	

Your top 2 strengths (highest scores):

1. _____

2. _____

Your top 2 development priorities (lowest scores):

1. _____

2. _____

30-Day Development Plan

Pick your single lowest-scoring non-negotiable and commit to focused improvement over the next 30 days. One at a time. Don't try to fix everything at once.

Non-negotiable I'm focusing on: _____

Week 1: Awareness

What specific situations this week will test this trait?

At the end of each day, ask yourself: Did I demonstrate this trait today? What could I have done differently? Notes:

Week 2: Practice

Identify one account interaction this week where you will deliberately apply this trait.

What does success look like in that interaction?

Week 3: Systems

What process, habit, or tool can you put in place to make this trait automatic rather than something you have to remember?

Week 4: Measure

How will you know you've improved? What observable evidence can you point to?

Who can give you honest feedback on your progress? (Manager, peer, customer)

The Commitment Tracker Quick-Start

One of the most immediately actionable frameworks from this episode is the four-element commitment model from *The CSM's Personal Playbook*. For every promise you make, capture these four elements:

- What - The specific deliverable or action
- Who - The person you promised it to
- When - The exact deadline (not "soon" or "next week")
- Done - What completion looks like so there's no ambiguity

Start today. Open whatever tool you use for task management and audit your open commitments. If any of them are missing one of these four elements, fill in the gaps right now. Then make it a habit for every commitment going forward.

Key Principles

1. **Ownership is not the same as control.** Own the narrative, the communication, the relationship, and the plan. Don't confuse that with owning the product roadmap, the support queue, or the contract.
2. **Curiosity about your own organization is just as valuable as curiosity about your customer.** Understanding how Product prioritizes, how Sales structures deals, and how Support triages tickets makes you dramatically more effective.
3. **Calm is a skill, not a personality trait.** It can be learned and practiced. Start with *Verbal Judo* by Dr. George J. Thompson if you want a foundational framework for composure under pressure.
4. **Follow-through failures are trust failures.** A missed email by Friday is not a scheduling problem. It's a signal to the customer about how much you value their time.
5. **Strategic thinking means saying no to noise so you can say yes to impact.** If you can't explain why you spent your time the way you did last week, you're operating reactively.
6. **Emotional intelligence includes self-protection.** Reading the room is important. Knowing when you're running on empty is just as important.
7. **Storytelling is how your work gets perceived.** The results matter, but the narrative you build around them determines whether anyone notices.

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)

Books by Mark Bernardin:

- *The Path to Green: Rescuing At-Risk Accounts and Building Resilient Customer Relationships*
- *The CSM's Personal Playbook*
- *CSM Bootcamp: Your 90-Day Onboarding Manual*
- *The Executive Business Review Playbook*
- *AI-Powered Customer Success: The Complete Implementation Guide*
- *How to Become a CSM*

All available at [Amazon.com](https://www.amazon.com)