

# What Does a CSM Actually Do?

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## Episode 3 Companion Checklist

This checklist breaks down the five core roles every CSM plays - and helps you audit whether you're actually doing the work that matters. Use this to identify gaps, prioritize your time, and stop reacting your way through the job.

### The Five Core Roles of a CSM

- The Translator
  - I translate customer needs into internal action and internal capabilities into customer outcomes.
- The Stabilizer
  - I manage the energy and temperature of difficult situations - keeping customers calm and engaged.
- The Strategist
  - I plan ahead, map stakeholders, identify patterns, and anticipate problems before they become escalations.
- The Firefighter
  - I triage escalations, stop the bleeding, and prevent the next fire from starting.
- The Advocate
  - I advocate for both customer needs internally AND protect company scope/sustainability externally.

### What You Don't Own (Even Though It Feels Like You Do)

- Renewals (if Sales owns the contract - you influence, not close)
- The Product Roadmap (you advocate, but don't control what gets built)
- Support (you're not Tier 1 - stop being treated like it)
- The Customer's Success (you enable it, guide it, remove blockers - but they have to do the work)

### The Mindset Shift: From Helper to Leader

- I take action without waiting for permission.
- I take ownership instead of deflecting blame.
- I prevent fires instead of just reacting to them.
- I act like a leader, even without the title.

## Mark's Rule in Action

*Proactive feels like overkill until reactive feels like drowning.*

### **Am I doing the proactive work that prevents escalations?**

- Building and maintaining runbooks
- Conducting regular sentiment calls (not just QBRs)
- Sending recap emails after every meaningful conversation
- Following up on action items - mine AND theirs
- Nudging customers before deadlines, not after

## Tools That Actually Help

- Account Success Plan (ASP) template
- CS platform (Gainsight, Planhat, or structured spreadsheet)
- Recap email template/habit
- Customer communication audit/sentiment tracker
- Stakeholder tracker (who's engaged, who's checked out, who has power)

## Weekly CSM Audit

Use this to gut-check where your time is actually going:

- How many hours did I spend in reactive mode vs. proactive planning?
- Did I prep for my meetings or just show up?
- Did I document key decisions and next steps?
- Did I follow up on what I said I would?
- Did I communicate internally to keep alignment strong?
- Did I say 'no' when I needed to - or did I over-commit?

Want more CSM frameworks, templates, and tactical resources?

Visit [ClearPathCX.com](https://ClearPathCX.com) or connect with Mark on LinkedIn at [linkedin.com/in/markbernardin](https://linkedin.com/in/markbernardin).