Internal Alignment Before External Action

Episode 9 Companion Download

Use this checklist to identify early warning signs of churn risk. The earlier you catch these signals, the more time you have to intervene and turn the account around.

Internal Alignment Tracker

Use this tracker to document internal alignment for at-risk account recoveries. Update weekly during the recovery period. Keep this in your account folder for easy reference and to have receipts when needed.

Account Information

Customer Name: ____

Recovery Period: _____________ to _____________

CSM Owner: ____

Recovery Status: Red | Yellow | Green

Sales Alignment

Sales Rep: ____

Briefing Date: ____

Communication Cadence: _______________________________________

Last Sync: ____

Key Commitments:

- ☐ Aligned on recovery messaging
- ☐ Boundaries clear (CSM = execution, Sales = renewal)
- ☐ No early discounting
- ☐ Weekly updates established

Outstanding Items: ____

____

Support Alignment

Support Lead: ____

Account Flagged: ____Yes ____No Date: ____________________

Priority Level Set: ____Yes ____No

Last Escalation: ____

Response Time Commitment: ______________________________________

Outstanding Items: ____

____

Product Alignment

Product Contact: ____

Request Submitted: ____

Committed Fixes:

1. ____
2. ____

Delivery Timeline: ____

Status: ____In Progress ____Delivered ____Blocked

Outstanding Items: ____

____

Leadership Alignment

Manager/VP: ____

Briefing Date: ____

Briefing Method: ____Email ____Meeting ____Slack

Leadership Support Needed: ____Yes ____No ____TBD

Executive Engagement: ____Required ____Not Required

If Required, When: ____

Outstanding Items: ____

Internal Alignment Email Templates

Copy, Customize, and Send

Sales Alignment Brief

Use this when briefing your AE on a recovery plan

> Subject: [Customer Name] Recovery Plan - Alignment Needed
>
> Hi [AE Name],

Quick heads up that [Customer Name] is currently red and we're implementing a 90-day recovery plan.

I wanted to brief you so we're aligned before any customer conversations.

Current State:

- [Brief description of risk - e.g., "Usage dropped 40% last quarter, sponsor expressing ROI concerns"]

Recovery Plan:

- Timeline: [Start date] to [End date]
- Key milestones: [List 2-3 major milestones]
- Success criteria: [What "green" looks like]

How We're Dividing Ownership:

- I own: Day-to-day execution, stakeholder management, technical delivery
- You own: Commercial conversations, renewal negotiation

What I Need From You:

- Weekly 15-min syncs (I'll send updates, you share any customer conversations)
- Hold off on pricing/discount conversations until we prove value (60 days minimum)
- Let me know immediately if customer reaches out with concerns

Let me know if you have questions or want to sync this week.

Thanks,

[Your Name]

Support Priority Notification

Use this to flag the account with Support teams

Subject: Priority Account Flag - [Customer Name]

Hi Support Team,

Heads up that [Customer Name] is in active recovery mode for the next 90 days. We're working to stabilize the relationship and any tickets from this account need priority treatment.

Account Details:

- Customer: [Customer Name]
- Domain/Email: [customer domain]

- Recovery Period: [Date] to [Date]
- CSM: [Your Name]

What I Need:

- Priority routing on all tickets from this account
- Ping me immediately on anything that looks like it might escalate
- Faster-than-normal response times (ideally same-day acknowledgment)

I'll keep you updated on progress and let you know when we're back to green and can return to normal prioritization.

Thanks for the support,

[Your Name]

Leadership Brief

Use this to inform your manager/VP about the recovery

Subject: [Customer Name] At-Risk Recovery Plan - FYI

Hi [Manager Name],

Wanted to brief you on [Customer Name] - they're currently red and I'm implementing a recovery plan.

Just keeping you informed in case this escalates.

Section 1: Current State

- Account is red due to [specific risk factors]
- Renewal is in [Q#], currently at risk
- ARR: [dollar amount]

Section 2: The Plan

- 90-day recovery plan focused on [key initiative]
- Major milestones: [List 2-3 with dates]
- Success defined as: [Specific, measurable criteria]
- Teams involved: Sales, Support, Product [adjust as needed]

Section 3: What I Need From You

- For now: Just awareness. If customer escalates to you, you'll have context.
- Potential future need: May need you to join executive-level call in [timeframe] to reinforce commitment
- I'll send you progress updates every [2 weeks/month]

I'll keep you posted. Let me know if you have questions or want to discuss.

Thanks,

[Your Name]

Pre-Flight Checklist

Before presenting any recovery plan to a customer, use this checklist to ensure your internal team is aligned.

Going in alone is how CSMs fail. These five boxes protect you, your customer, and your recovery plan.

☐ *Sales Alignment*

Sales is briefed and aligned on messaging, milestones, and boundaries

What this means: AE knows the recovery plan, agrees on who owns what (CSM = execution, Sales = renewal), commits to weekly syncs, and won't discount before we prove value.

☐ *Support Prioritization*

Support knows this is a priority account and has committed to faster response times

What this means: Account is flagged in the support system, tickets get priority routing, escalations get immediate attention, and Support lead is aware this is a 90-day recovery window.

☐ *Product Commitment*

Product has committed to at least one high-visibility fix or feature

What this means: We've prioritized 1-2 small but impactful fixes, framed them in Product's language (data, adoption metrics, business impact), and they've committed to a delivery timeline.

☐ *Leadership Awareness*

Leadership has been briefed on recovery timeline and potential escalation points

What this means: Manager/VP knows account is red, knows the plan, knows the timeline, and knows what support we might need (air cover, executive engagement). They won't be blindsided.

☐ *Documentation Complete*

All alignment is documented with receipts

What this means: Recap emails sent, meeting notes saved, Slack threads captured. When someone says 'I didn't know that' six weeks from now, we have proof.

The Rule: If you can't check all five boxes, you're not ready to present to the customer yet. Sometimes you need to move fast - then do the minimum version. But never go in alone.

Want more CSM frameworks, templates, and tactical resources?
Visit ClearPathCX.com or connect with Mark on LinkedIn at
linkedin.com/in/markbernardin.