

# CSM – Skills & Characteristics

## CSM Discipline:

- “Fundamental” – ideally required from any CSM regardless of the type of activities and products they work with (Tech/Non-Tech)
- The 4 disciplines relate to the major domains CSM perform.
  - “Consultant”
  - “Project Manager”
  - “Data Analysis”
  - “Account Manager”

CSM DISCIPLINE	DESCRIPTION		CHARACTERISTIC?	SKILL?
“Fundamental”	Emotional Intelligence	The ability to manage both your own emotions and understand the emotions of people around you.	Y	
“Fundamental”	Empathy	Understanding and acknowledging another’s feelings or situations	Y	
“Fundamental”	Persuasive	Understanding the psychology involved in influencing others so that you understand what is required to get to "yes"	Y	Y
“Fundamental”	Proactive	Gather more information to prepare for what might be next or stay ahead of another request	Y	
“Fundamental”	Tenacity	Being very determined with great work ethic and a willingness to do what needs to be done to make the customer successful. “Not giving up when situation gets tough”	Y	
“Data Analysis”	Problem Solving	Gathering the relevant information, identifying alternatives, making a choice, and acting		Y
“Data Analysis”	Analytical Skills	They need to understand data from surveys, buying patterns, demographics, behaviors,		Y

		engagement, and feedback specific to their industry and customer base.		
"Account Manager"	Having difficult conversations & Objection Handling	Staying calm to find a compromise for the situation (regardless of how right or wrong the customer is) and sticking to the facts.		Y
"Account Manager"	Relationship Building	listening to the customer, understanding their needs and work processes, and building trust, among other tools and techniques.		Y
"Project Management"	Expectation Management	Desire to avoid disappointment by establishing in advance what can realistically be achieved or delivered.		Y
"Project Management"	Time Management & Prioritization	The ability to use one's time effectively or productively, especially at work.		Y
"Project Management"	Project Management	Project management is the use of specific knowledge, skills, tools and techniques to deliver something of value to people. (pmi.org)		Y
"Project Management"	Professional Agility	Internal and external changes can affect the customer journey. CSMs is expected to recognize changes and advise the customer to make the necessary adjustments.		Y
"Consulting"	Business Acumen	Connect the suppliers' technology to the customer's business outcome. Understand some of the finer points of the customer's business.		Y
"Consulting"	Product Knowledge	Understand the technology from a user's perspective and provide best practices for the intended business use of that technology.		Y
"Consulting"	Domain Expertise	Being a consultant to the customer and the ability to improve business outcomes using the technology/product.		Y
"Account Manager"/"Consultant"	Effective Communication	Able to translate complex functional or technical situations into easily understood concepts. involves the combination of speaking AND listening well.	Y	Y