



The  
**CSCYCLE**  
experience growth

## CS Skills framework



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Experienced with SW  
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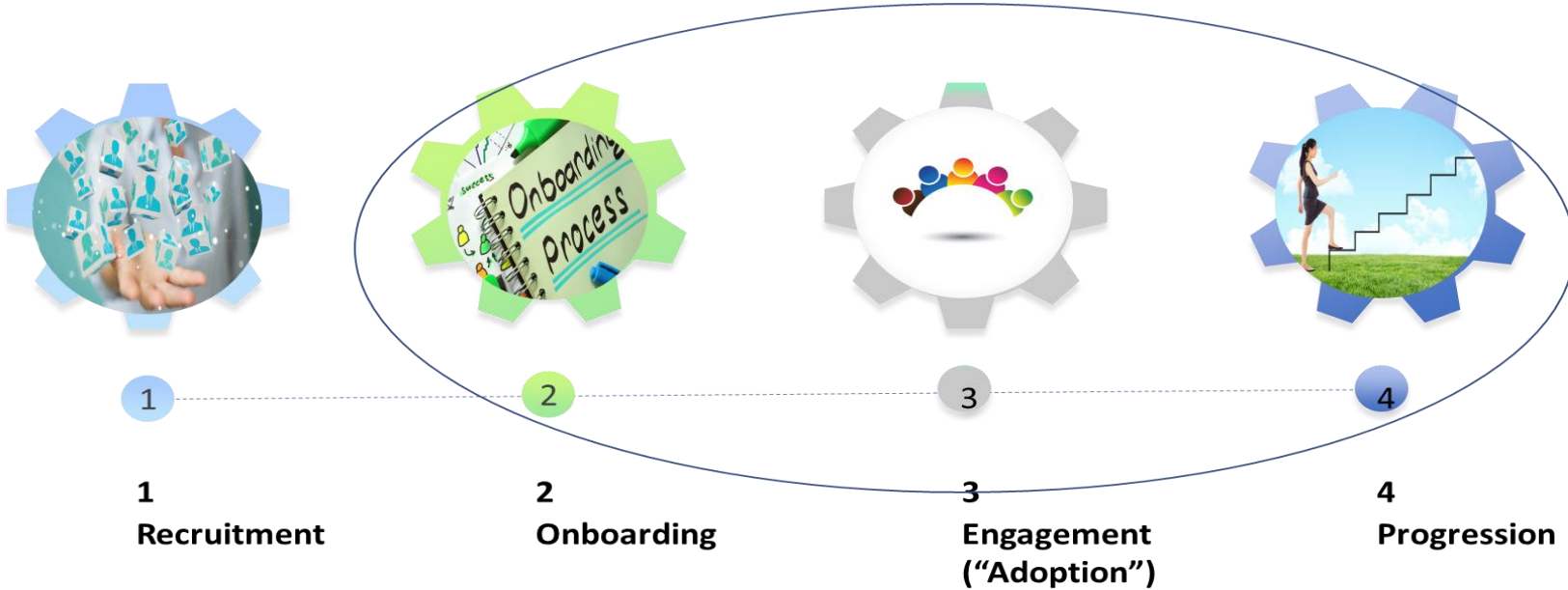
First novel published  
in 2021  
Second novel  
published in 2023



# The CSM Journey

- The “CSM journey” is similar to the “Customer Journey”
- Our goal as CS leaders is to help our CSM to be successful (similar to our customers)
- We want our CSMS to be a great advocate of our company (same as we want our customers to be our advocates).
- We also don’t want our successful CSM to leave us.
- Grooming CS talent makes us (managers and leaders) better people and professionals. We contribute to our company’s success and develop our team members. But there is more...
- We also contribute to the CS community by helping to develop excellent professionals that will further groom the next generation.

# The CSM Journey





# The Multifaceted CSM

- This framework was developed based on years of experience managing CS professionals.
- Framework was developed based on the assumption that it is challenging to find the “perfect / Supper CSM”. The one who masters a variety of skills and has substantial experience in different domains.
- I split the CSM role into sub-categories reflecting different aspects and areas of expertise I wish to have in my team.
- The idea is to define the underlying skills for each category and make sure we drive our team members to master more than one domain (See next slide)

# The Four CSM Facets

## **Domain Expert/Trusted Advisor**

*Knowledgeable about the Product & Industry. Able to advise and promote value based on domain expertise, relationship and building trust*

## **Data Analyst**

*Comfortable with Data analysis, developing reports, dashboards and presenting data-driven conclusions and recommendations*

## **Difficult Discussions/Negotiation skills**

*The account manager profile. Comfortable with commercials, negotiations, and more difficult discussions*

## **Planner/Executioner**

*The Project Manager profile. Comfortable with scope management, planning and monitoring, risk management, and mitigation.*



**CS Team**



# The underline skills

## Trusted Advisor

- Proactive Questioning
- Domain Expertise
- Value articulation
- Relationship building
- /Stakeholder management
- Presentation skills

## Difficult Discussion

- Active listening
- Empathy
- Attention to details
- Problem solving
- Stakeholder management
- Commercial awareness
- Presenting skills

## Planning Prioritization

- Project/Onboarding plans
- Roles and responsibilities
- Scope management
- Prioritization
- Task execution and monitoring

## Data Analysis

- Attention to details
- Technically savvy
- Presentation skills
- Problem-solving
- Product Knowledge

# How to develop the skills in your team

## Trusted Advisor

- Review existing Playbooks and Suggest Playbook Improvements
- Fine-tune the value messaging (can also be a cross-team collaboration with sales)
- Improve QBR presentations
- Preparation for Renewal discussions

## Difficult Discussion

- Simulations: responding to customer escalation following Product malfunction, Service interruption or Missing features
- Lead root cause analysis process and present Lessons learned to customers.
- Simulate renewal discussion

## Planning Prioritization

- Review the Onboarding playbook and suggest efficiencies/automation
- Focal point to the product team for customers feedback and Feature request prioritization

## Data Analysis

- Review existing dashboards and reports.
- Review usage metrics and KPIs and propose changes
- Propose new dashboards
- Plan automated usage alerts/reports
- Align with Product/Engineering on CS data analysis needs and future improvements.





# Mentoring and Grooming the Skills of the CS Team

- Improve CSM skills -> Better Employee satisfaction -> Increase employee retention
- Stronger and diversified team delivers better business results
- Skills diversity across the team -> Reducing “single point of failures”
- Empower the CS team members to promote their strengths and support each other to strengthen the “Team spirit”



# Additional suggestions for the CS Leader

- Identify the domain expertise and skillset required in your CS team
- Map them to the CSM domain (“facets”) outlined in this playbook
- Identify Knowledge/Skills gaps
- Maintain a process to develop additional skills and expertise in your team
- Consider external and internal learning growth initiatives including cross-team mentoring by senior CSMs

# THANK YOU!



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