



THE CSM JOURNEY COURSE



ABOUT THIS COURSE

The course provides a practical learning experience of the CS field fundamentals and the CSM roles and responsibilities, including onboarding, customer journey, data analysis, meeting management, and customer relationship management.

THE COURSE WILL INCLUDE

- ✓ A short 10-15 min lessons.
- ✓ Real-life simulations and practical exercises.
- ✓ Getting to know real CS tools.
- ✓ A license for one year so you can learn in your free time with no pressure.
- ✓ The course will be in Hebrew. (English version will be released later this year).



WHAT'S IN IT FOR YOU?

Understand the essence and language of Customer Success.

Understand the onboarding process, from sales handover to launch, and know what to expect at every step.

Gain a deep understanding of the customer journey, manage customer expectations, and build trust and long-lasting relationships.

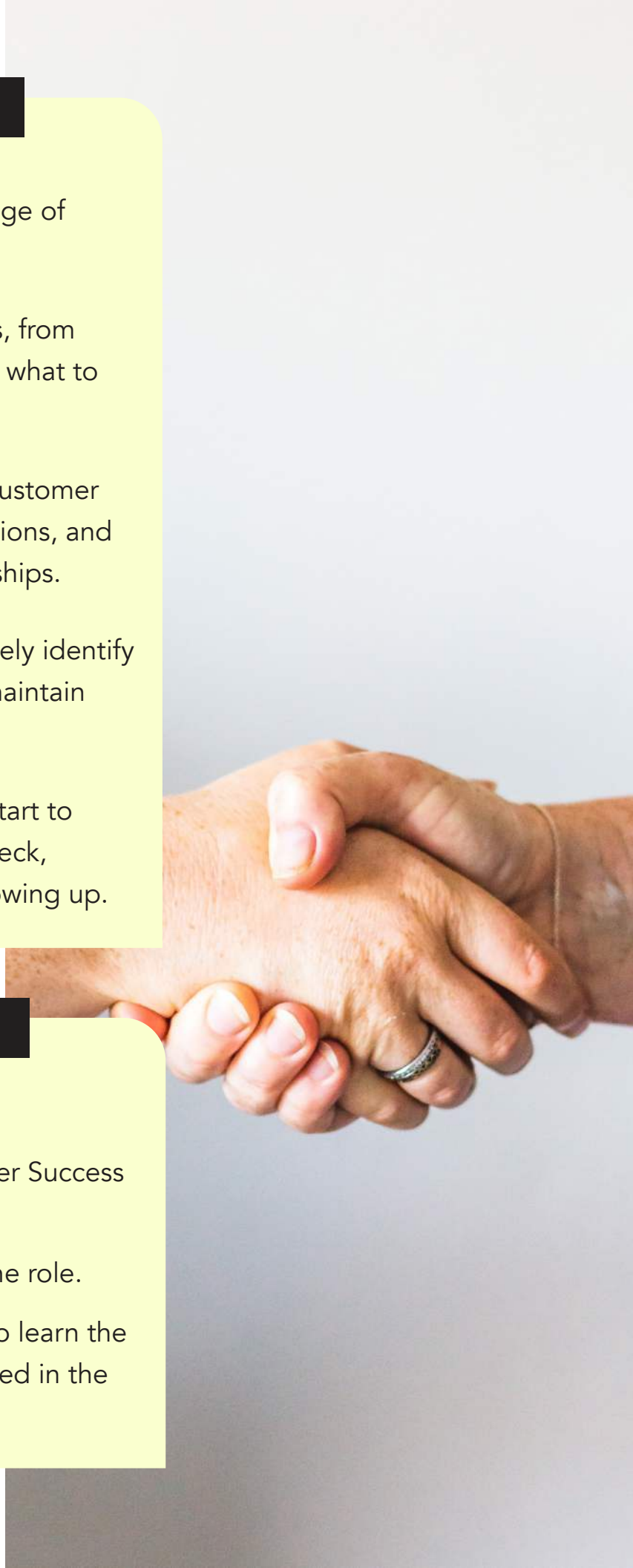
Analyze customer data and proactively identify trends, risks, and opportunities to maintain excellent customer health.

Effectively manage meetings from start to finish, including building the right deck, preparing for the meeting, and following up.

TARGET AUDIENCE

Our course is designed for:

- ✓ People who want to be Customer Success Managers.
- ✓ CSMs in their first 1-2 years in the role.
- ✓ It's perfect for those who want to learn the skills and tools needed to succeed in the field and advance their careers.



COURSE SYLLABUS



1 INTRODUCTION TO THE CUSTOMER SUCCESS FIELD

- ✓ The basics of Customer Success
- ✓ The Importance of Customer Success to business growth
- ✓ The skills and characteristics needed for success in the field

2 THE ONBOARDING PHASE FROM SALES HANDOVER TO LAUNCH

- ✓ Learning every step of the process
- ✓ The CSM's role and responsibilities
- ✓ Building a value plan
- ✓ A real-life exercise using an Onboarding tool

3 THE CUSTOMER JOURNEY FROM GOING LIVE TO RENEWAL

- ✓ The CSM's role and responsibilities
- ✓ Managing a portfolio of customers and driving value at scale- Tips and tricks
- ✓ Interfaces with Sales, Marketing, and product teams
- ✓ Renewal/Churn playbooks - How to be proactive?

4 ESSENTIALS OF READING DATA

- ✓ Getting familiar with types of parameters and KPIs
- ✓ Look at data or signs in the ecosystem and draw correct conclusions
- ✓ Communicating findings to your team
- ✓ Real-life exercises with a CS tool

5 MANAGING A CUSTOMER MEETING FROM START TO FINISH

- ✓ Tactical vs. strategic meeting
- ✓ Building the right presentation
- ✓ Meeting preparations to optimize the expected results
- ✓ Best practices for follow-up

6 HOW TO BEST MANAGE A CUSTOMER

- ✓ Building trust and long-lasting relationships
- ✓ Identifying and addressing customer concerns