

HOW TO DOCUMENT A CUSTOMER SUCCESS PROCESS



1

Define the process and its scope

Be precise. Focus on one process or CSM playbook at a time.



2

Organize the steps

Perform a walk through with your best CSMs who usually perform the process and document their steps.



3

Describe who is involved

Chart a workflow including all other stakeholders' activities using separate swim lanes.



4

Add control points

These are important review points designed to ensure the process is going well.



5

Address exceptions

Specify what actions should be taken when things go differently than expected.

6

Test the process

Run a 'proof of concept' with a few CSMs to test the new process out, before releasing it to the entire team and customer base.



This infographic was provided to you by Pedro Candelas, Sr. Customer Success Operations Manager at Elastic



CSM PRACTICE
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