

CSM ROLE PROFILES



Domain Expert/Trust Advisor



- ✓ Ability to conduct proactive questioning and unveil customer challenges
- ✓ Domain Expertise
- ✓ Consultive approach
- ✓ Value articulation-translate product features to business value
- ✓ Relationship building
- ✓ Comfortable presenting Industry and product best practices

The Negotiator

- ✓ Demonstrable experience handling difficult conversations
- ✓ Active listener
- ✓ Driving the conversation to resolution
- ✓ Thrives under pressure
- ✓ Problem solver
- ✓ Stakeholder management



Data Analyst

- ✓ Analytical person - Attention to detail and numbers
- ✓ Natural curiosity to numbers and metrics
- ✓ Experienced in driving usage and adoption based on data analysis
- ✓ Comfortable presenting data analysis and conclusions
- ✓ Nice to have - coding experience to develop ad-hoc and customized scripts



Project Manager

- ✓ Experience in creating and maintaining Project and On boarding plans
- ✓ Defining Roles and responsibilities with customers
- ✓ Scope management
- ✓ Task Prioritization
- ✓ Task Execution and monitoring
- ✓ Risk Management



This infographic was provided to you by Guy Galon, VP of Customer Success at Hysolate.



CSM PRACTICE
THE CUSTOMER SUCCESS STRATEGY CONSULTING FIRM