



TOP
8

Customer Success Manager Mistakes

#1 Customer Success Manager Mistake

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Not Putting the Customer First



Referred to as the 'golden rule of customer success,' the entire idea of putting the customer first is the epitome of GREAT customer success. Often, Customer Success Managers (CSMs), leaders, or even company executives try to push the customers into doing what they are not ready for yet like agreeing to an upsell or activating a new department. Step back and make sure that decisions are taken with the customer's best interests in mind.

#2 Customer Success Manager Mistake

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Not Segmenting Customers



Services provided to your largest customers might be overkill for your smaller ones. And if you limit the benefits for your larger clients to the extent that you offer your smaller ones, you risk not meeting their needs. Creating customer segments and letting that guide the time allocation and touchpoints would be appreciated both by your organization as well as your customers.

#3 Customer Success Manager Mistake

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Driving Too Many Things at Once



Customer Success Managers sometimes try too many things at once, from platform updates to relationship building e-mails, setting up update calls to sharing best practices content, throwing in some professional service offerings, following up on customer education training, and more. Take the time to plan and pace things out; you cannot afford to be the one creating fatigue in the relationship.

#4 Customer Success Manager Mistake

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Going Crazy with the **KPIs**



As a Customer Success Manager, you want to achieve all the goals. However, it is impossible to improve everything at once: the onboarding process, retention, MRR growth, and upsell, among other things. If you chase too many rabbits, you will catch none. Make a plan on what needs current attention, share with leadership, and then focus on them until you get positive results. Only once you achieve the initial goals, should you move to the next few.

#5 Customer Success Manager Mistake

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Not Planning Out your Day



As a Customer Success Manager, your days can be very different. If you let your email inbox take you where it will, every morning, you will find yourself spending time handling only the urgent issues, and never be able to make time for the important. Create guidelines that you can use to stay on track throughout the day, and always allocate time for (and block on your calendar), slots that will let you think through and execute improvement.

#6 Customer Success Manager Mistake

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Confusing Silence with Success



Some Customer Success Managers assume that silence from a customer translates to their being happy with the service/product. Diligently monitor metrics and data that bring to light underlying issues or red flags. If that doesn't throw up anything, try to use your high touch or tech touchpoints to gauge the satisfaction levels. Do what it takes to avoid getting surprised by churn, as much as possible.

#7 Customer Success Manager Mistake

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Failing to Manage Expectations



Even if everything else were working well, if a Customer Success Manager fails to manage expectations around onboarding, the training process, time required to fix an issue, or even the expected outcomes of regular meetings or touchpoints, the satisfaction levels for customers would start slipping. Allow this to happen a few times and the customer will eventually become a non-believer in your ability to manage the relationship.

#8 Customer Success Manager Mistake

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Trying to Handle Too Many Accounts



Customer Success Managers usually don't cause this problem and typically inherit it, based on the decision of a leader who thinks you can successfully manage 'X' accounts. However, if you figure out that you have too many accounts to do justice (considering the maturity of the product, clients, organization & tools available) it is crucial to have this conversation (armed with data points) with your manager to limit your responsibility to what you can reasonably succeed with.