A CSM's performance evaluation scorecard

A Customer Success Manager (CSM) is responsible for ensuring that a company's customers are satisfied with the products or services they have purchased and that they continue to do business with the company. It's important that CSMs are routinely evaluated on their performance in order to escalate up the CS career ladder.

The following is a scorecard or evaluation of the key responsibilities and competency skills of a CSM. This scorecard will:

- Provide a CSM with greater clarity into what is expected of you and your role level currently.
- Provide transparency into what is expected of each role at different levels, and therefore offer a clear development path.
- Provide guidance for development plans to help you set learning objectives to fulfill a CSM's career ambitions.

Full name	James P. Sullivan
Job title	Senior Customer Success Manager
Department	Customer success
Manager	Randall Boggs
Supervisory?	☐ Nonsupervisory ☐ Supervises others

1	Basic understanding
2	Applied understanding
3	Intermediate proficiency
4	Advanced proficiency
5	Expertise
6	Mastery

Employment & working hours	☐ Hourly ☐ Salary
Date	01/01/2023
Period of scoring	07/01/2022 – 01/01/2023
Overall rating	

If you score mostly 1s, you have a basic understanding; 2s, you have an applied understanding; 3s; intermediate proficiency… you get the gist!

Customer success skills						
	1	**2**	**3**	**4**	**5**	**6**
Customer complaint handling	Recognizes the importance of effectively handling customer complaints. Can identify the key stakeholders and decision-makers within a customer organization.	Can understand the customer's perspective and respond to complaints in a professional manner. Can identify and escalate serious complaints to the appropriate	Can effectively use customer feedback to improve products or services. Can identify and resolve customer issues in a timely and efficient manner.	Can develop and implement complaint handling procedures and best practices. Can lead and mentor others in the effective handling of customer complaints.	Can identify and capitalize on new business opportunities within existing customer accounts by effectively addressing and resolving complaints. Can create and deliver	Consistently exceeds customer expectations by effectively addressing and resolving complaints. Can lead and drive organizational change to improve overall

	1	2	3	4	5	6
		department or team.	Can develop and maintain positive relationships with key stakeholders and decision-makers within customer organizations.		compelling customer success stories.	customer experience and complaint handling processes.
Following up with customers	Recognizes the importance of following up with customers to ensure they are getting the most value from the products or services they have purchased. Can identify the key stakeholders and	Can create and execute a basic plan for following up with customers. Can identify opportunities for upselling or cross-selling based on customer needs and feedback.	Can effectively use customer feedback to improve products or services. Can identify and resolve customer issues in a timely and efficient manner. Can develop and maintain positive	Can identify and capitalize on new business opportunities within existing customer accounts. Can lead and mentor others in the effective use of follow-up strategies and best practices.	Can develop and implement customer retention and loyalty programs. Can create and deliver compelling customer success stories.	Consistently exceeds customer expectations and drives exceptional customer satisfaction Can lead and drive organizational change to improve overall customer experience.

	decision-makers within a customer organization.		relationships with key stakeholders and decision-makers within customer organizations.			
	1	**2**	**3**	**4**	**5**	**6**
Process milestones for customers and employees to work toward	Recognizes the importance of setting process milestones for clients and employees to work towards. Can identify the key processes and stakeholders involved in a project or service.	Can create and communicate basic process milestones to clients and employees. Can track progress towards milestones and identify potential obstacles or delays.	Can effectively use feedback from clients and employees to adjust and improve processes. Can identify and manage interdependencies between different processes. Can develop and maintain positive relationships with key stakeholders and	Can develop and implement process improvement plans and best practices. Can lead and mentor others in the effective setting and tracking of process milestones.	Can identify and capitalize on new business opportunities by effectively managing and improving processes. Can create and deliver compelling case studies of process improvement.	Consistently exceeds client and employee expectations by effectively managing and improving processes. Can lead and drive organizational change to improve overall process efficiency and effectiveness.

	1	2	3	4	5	6
			decision-makers within client and employee organizations.			
Assist customers when setting up new software	Recognizes the importance of assisting customers with setting up and navigating programs or software. Can identify the key features and functions of the program or software in question.	Can provide basic assistance to customers in setting up and navigating the program or software. Can identify and troubleshoot common issues that customers may encounter.	Can effectively use customer feedback to improve the program or software. Can develop and maintain positive relationships with key stakeholders and decision-makers within customer organizations. Can provide detailed and accurate information to customers about the	Can develop and implement training programs and resources for customers. Can lead and mentor others in the effective use of the program or software.	Can identify and capitalize on new business opportunities by effectively assisting customers with the program or software. Can create and deliver compelling customer success stories.	Consistently exceeds customer expectations by effectively assisting them with the program or software. Can lead and drive organizational change to improve overall customer experience and program or software usage.

	program or software.					
	1	2	3	4	5	6
Upsell products and/or services	Recognizes the importance of upselling services and products with the brand image. Can identify the key products and services offered by the company.	Can upsell basic products and services to customers. Can align the upsell with the company's brand image and messaging.	Can effectively use customer feedback to identify upselling opportunities. Can develop and maintain positive relationships with key stakeholders and decision-makers within customer organizations. Can provide detailed and accurate information to customers about products and services.	Can develop and implement upselling strategies and best practices. Can lead and mentor others in the effective use of upselling techniques.	Can identify and capitalize on new business opportunities by effectively upselling products and services. Can create and deliver compelling customer success stories.	Consistently exceeds customer expectations by effectively upselling products and services. Can lead and drive organizational change to improve overall sales and customer experience.

Human skills

	1	2	3	4	5	6
Proactiveness	Actively kickstarts new CS initiatives when prompted, and with their manager's support	Actively kickstarts new CS initiatives, when prompted, and with their manager's support.	Proactively conceptualizes and kickstarts content initiatives, without being prompted, and with limited support.	Proactively and regularly conceptualizes and kickstarts cs initiatives, without being prompted, and with limited support. Is one step ahead rather than waiting to be told.	Consistently and proactively conceptualizes and proposes CS initiatives to junior and senior members of the team to further our content strategy and business goals.	Consistently and proactively conceptualizes and proposes content initiatives to junior and senior members of the team to further our CS strategy and business goals.
	1	**2**	**3**	**4**	**5**	**6**
Teamwork	Works collaboratively as a team and is able to offer opinions when prompted.	Works collaboratively as a team member and actively advocates for the CS team in the wider business. Proactively contributes to	Works collaboratively as a team member and proactively advocates for the CS team. Proactively contributes to team discussions and	Works collaboratively as a team member and proactively advocates for the CS team in the wider business. Proactively facilitates	Always motivating and facilitating teamwork for efficient working to create strong working relationships and opportunities to learn from each	Always motivating and facilitating teamwork for efficient working to create strong working relationships and opportunity to learn from each other.

	team discussions and supports other team members.	supports other team members. Facilitates bringing the team together for effective teamwork when prompted.	bringing the team together for effective teamwork.	other.	

	1	2	3	4	5	6
Willingness to learn	Works with manager to create development plans and is passionate to learn about given topics that will help excel your role and career development.	Works with manager to create development plans and also proactively researches topics that will help excel your role and career development.	Fully self-aware of the areas needed to help advance your career and role and proactively proposes development plans and ideas to achieve this.	Proactively creates development plans, with full self-awareness of the key areas of development and always looking for ways to improve your skills.	Proactively creates development plans for yourself and your direct reports. Understands and is aware of key areas of development and can source this knowledge internally or externally, for yourself, and your team.	Proactively creates development plans for yourself and your direct reports. Understands and is aware of key areas of development and can source this knowledge internally or externally, for yourself, and your team.

	1	2	3	4	5	6
Stakeholder	Works	Reaches out to	Understands	Ensures all the	Has a strong	Has an

management	comfortably with stakeholders, internally and externally, and maintains contact with a few stakeholders.	stakeholders, with support from manager, both internally and externally. Has built a small network of stakeholders to maintain good relations with.	which stakeholders need to be involved in projects, internally or externally, and how to tailor your approach. Proactively reaches out to stakeholders and maintains good working relationships.	necessary stakeholders are involved in projects, internally or externally, and how to involve each one for a win-win situation. Proactively reaches out to stakeholders and maintains good working relationships.	working relationship with stakeholders, internally and externally, fully understanding how to create a win-win situation. Advocates the CS team with your stakeholder network and to share information with the team.	exceptional working relationship with stakeholders, internally and externally, fully understanding how to create a win-win situation. Advocates the CS team with your stakeholder network and shares information with the team.
	1	**2**	**3**	**4**	**5**	**6**
Communication	Communicates effectively, regularly asks open questions, and listens to gather insights into others perspectives.	Clearly communicates messages, articulating their perspective so it's easy to understand, and adapts your communication style to the people involved	Communicates clearly with empathy using a range of communication methods. Able to determine the best communication method to achieve the	Communicates clearly, concisely, and with empathy. You have a high level of self awareness, managing emotions and respecting others. You	Communicates clearly, concisely, and with empathy. You have a high level of self awareness, managing emotions and respecting others. You	Communicates clearly, concisely, and with empathy. You have a high level of self awareness, managing emotions and respecting others. You

	in the situation. Can start to offer constructive feedback by asking why and how.	desired outcome, whilst understanding the needs of others. Can start to offer constructive feedback positively.	confidently facilitate challenging situations where participants hold different views and outcomes. Can comfortably offer colleagues constructive feedback positively.	confidently facilitate challenging situations where participants hold different views and outcomes. You assess the room to tailor your communication style and coach your time on this.	confidently facilitate challenging situations where participants hold different views and outcomes. You assess the room to tailor your communication style and coach your time on this.
	1	**2**	**3**	**4**	**5**	**6**
Openness to feedback	Always open and able to rationally accept feedback and with support, develop on this.	Always open and able to rationally accept feedback and with support, develop on this.	Proactively seeks feedback and is able to rationally accept and act on this, with limited support.	Proactively seeks feedback and is able to rationally accept and act on this independently.	Proactively seeks feedback and is able to rationally accept and act on this independently. Always encourages the team to seek out feedback for continuous improvement.	Proactively seeks feedback and is able to rationally accept and act on this independently. Always encourages the team to seek out feedback for continuous improvement.

	1	2	3	4	5	6
Project & time management	Able to support team members when asked.	Actively supports team members.	Proactively supports team members.	Proactively supports team members and any direct reports. Responsible for yours and your direct reports KPIs and development plans, with support from your manager.	Proactively supports and inspires team members and direct reports. Responsible for yours and your direct reports KPIs and development plans, with support from your manager. Delegates effectively, leaning on different management styles and supports junior managers in your team.	A natural leader. Proactively supports and inspires team members and direct reports. Responsible for yours and your direct reports KPIs and development plans. Delegates effectively, leaning on different management styles. Confident setting departmental and individual KPIs.

	Leadership					
	1	2	3	4	5	6
Management &	Able to support	Actively	Proactively	Proactively	Proactively	A natural

leadership	team members when asked.	supports team members.	supports team members.	supports team members and any direct reports. Responsible for yours and your direct reports KPIs and development plans, with support from your manager.	supports and inspires team members and direct reports. Responsible for yours and your direct reports KPIs and development plans, with support from your manager. Delegates effectively, leaning on different management styles and supports junior managers in your team.	leader. Proactively supports and inspires team members and direct reports. Responsible for yours and your direct reports KPIs and development plans. Delegates effectively, leaning on different management styles. Confident setting departmental and individual KPIs.