

A CSM's weekly 1 to 1 template

Regular one-to-one (1:1) meetings between CS leaders (either VPs, Directors or Heads of Customer Success) and Customer Success Managers are invaluable. You can't possibly function without them. Unfortunately, they can often be unstructured.

Having a structure in place can make it easier to track progress week-to-week and ensure that you come out of each weekly 1:1 with actionable plans to help CSMs achieve their goals incrementally.

Use this quick and easy template as a guide to help structure your CSM's weekly 1:1 meetings and instantly make them a more productive use of time. The notes and discussion points are just a suggestion, so tailor them to your customer success team's specific requirements as and when you need.

Topic	Notes & discussion points
From last week's meeting:	Quickly recap the previous 1 to 1: <ul style="list-style-type: none">- What action points were discussed last week?- How were those actioned?- Any relevant/related stats?
Challenges and blockers	Did anything hinder progress over the last week? <ul style="list-style-type: none">- Was anything more challenging than expected?- Were there any significant blockers?- How do you plan to address them?
Pipeline review:	How has the pipeline changed in the past week? <ul style="list-style-type: none">- New opportunities- Deals progressed

	<ul style="list-style-type: none"> - Overall pipeline health
Closed deal review:	<p>Have any deals closed since the last 1 to 1?</p> <ul style="list-style-type: none"> - What was won? - What was lost? - What learnings can you take? (what went well/can be improved?)
Stats and figures	<p>Review the previous week's stats and sales activities:</p> <ul style="list-style-type: none"> - [These will vary from team to team and rep to rep.] - [As an example, think about things like activity numbers here.]
Action items	<p>What actions need to be taken before the next 1 to 1?</p> <ul style="list-style-type: none"> - [As above, these will depend on the meeting's content.] - [Try to include items whose progress can be tracked next week!]