Customer Success Institute

Mission

The mission of the Customer Success Institute (CS Institute) is to elevate the customer management profession by delivering rigorous, cutting-edge **training** tailored to the evolving demands of the industry. We are committed to providing a prestigious, accredited certification**, the Certified Customer Success Manager (CCSM),** that assures competence and readiness for the challenges of modern customer management roles. Through partnerships with industry leaders and continuous refinement of best practices, we prepare our candidates to excel and lead in their careers.

Vision

Our vision is to set the global standard for excellence in Customer Success (CS). We aim to be the leading institute recognized by industry professionals and employers alike for our commitment to developing job-ready talent and pioneering customer success practices. By fostering strong collaborations with thought leaders and companies, we strive to innovate and uphold the highest standards, ensuring our certification is synonymous with expertise and value in the marketplace.

Recognized Certification, Standards, and Training Elevates CSM's

Program Overview

The role of Customer Success Manager (CSM) has experienced significant growth in recent years, reflecting its increasing importance in various industries, particularly in technology and software sectors; though we belive that a CSM could provide ROI-proven benefits to companies outside of the technology and software sectors.

Companies are increasingly recognizing the value of customer success teams in driving revenue growth and enhancing customer experiences. While there are many types of training, certifications, and varying approaches to the "CSM" career path, we will maintain a set of standard competencies and rigorous certifications (CCSM) that align with employer needs as well as input from industry leaders and the evolving skillsets needed by CSMs to meet current and future demands.

CSM Program Structure

- **Duration**: 16 weeks (4 months)
- **Modules**: 16 weekly modules covering foundational to advanced customer success topics.

- **Format**: A combination of live lectures, workshops, role-playing, group activities, case studies, and AMA (Ask Me Anything) sessions with industry leaders.
- **CCSM Certification Exam**: A 180-question certification exam including scenarios and multiple-choice questions.

Key Features

- **Standards & Competencies**: Entire curriculum based on CSM standards, competencies, and professional CSM skill development.
- **Leadership Development**: Integrated sessions to cultivate leadership and influence-building skills.
- **Practical Applications**: Case studies, role-playing, and group activities for real-world scenarios.
- **Job-Ready Curriculum**: Emphasis on emerging technologies, job-ready competencies, and integration of key CSM tasks.

Curriculum Overview

Week 1	Introduction to Customer Success Management
Week 2	Fundamentals of Customer Success Management I
Week 3	Fundamentals of Customer Success Management II
Week 4	Managing Customer Health and Risk
Week 5	Driving Renewals & Retention
Week 6	Leading Strategic Collaboration
Week 7	Tools of the Trade
Week 8	Problem Solving & Critical Thinking
Week 9	Advocacy, Education, & Influence
Week 10	Renewal Strategies & Negotiation
Week 11	Advanced Customer Success Practices
Week 12	Leadership in Customer Success
Week 13	Advanced Topics in Customer Success, Part I
Week 14	Advanced Topics in Customer Success, Part II
Week 15	The AI-First CSM
Week 16	Career & Exam Prep

Competencies Achieved

Customer Communication and Relationship Management	• Mastery of professional, empathetic, and effective communication with customers. • Ability to manage challenging conversations, including handling escalations and saying "no" constructively. • Building and sustaining long-term customer relationships to drive satisfaction and loyalty.
Customer Intelligence and Strategic Insights	• Proficiency in researching and understanding customer needs, preferences, and goals. • Using data to anticipate customer challenges and opportunities. • Translating customer insights into actionable strategies for engagement and retention.
Customer Lifecycle and Experience Management	• Comprehensive understanding of the customer lifecycle, including onboarding, adoption, renewals, and expansion. • Developing and executing strategies to optimize each lifecycle stage. • Utilizing proactive engagement techniques to enhance the customer experience.
Data-Driven Decision Making Metrics	• Ability to interpret key metrics such as Net Promoter Score (NPS), customer health scores, and churn rates. • Using data to inform decision-making and craft success plans. • Familiarity with CRM tools and customer success dashboards for effective data management.
Risk and Excalation Management	• Identifying and mitigating risks to prevent customer churn. • Managing bugs, feature requests, and other technical challenges with cross-functional collaboration. • Turning around ailing accounts and managing escalations effectively.
Strategic Account Management	• Developing and maintaining success plans that align with customer and business goals. • Leading Quarterly Business Reviews (QBRs) and Customer Outcomes Reviews (CORs) to ensure alignment and value. • Driving account growth through upselling, cross-selling, and expansion strategies.
Problem-Solving & Critical Thinking	• Analyzing complex customer scenarios to identify root causes and recommend solutions.

	- Implementing creative problem-solving techniques to overcome customer challenges. - Demonstrating professional time management and prioritization in complex environments.
Leadership and Cross-Functional Collaboration	- Leading customer success initiatives and mentoring junior team members. - Building alignment and strategic partnerships with sales, product, and implementation teams. - Influencing internal stakeholders to prioritize customer-centric solutions.
Technology and Tools Mastery	- Using segmentation and playbooks to personalize customer engagement. - Familiarity with CRM tools, customer success platforms, and productivity tools like Excel or Google Sheets. - Leveraging emerging technologies and AI to scale customer success operations.
Advocacy and Influence	- Creating and managing advocacy programs that encourage customers to champion your products or services. - Effectively educating customers to maximize product value and ensure long-term adoption. - Building trust and influence with internal and external stakeholders to achieve shared goals.
Professional Development and Industry Knowledge	- Continuous improvement through professional development and upskilling in customer management practices. - Understanding the fundamentals of value creation, sales alignment, and success planning. - Staying informed about industry trends, innovations, and future opportunities in customer success.

Becoming Certified

In order to develop and maintain an industry-standard certification for customer success management professionals, the following eligibility requirements and processes have been put in place. These are based on current employer needs and input. They may change and update according to employer and career standards.

Certificate Eligibility Requirements

Educational Background	• High school diploma or higher education degree
Professional Experience	• Minimum of 1 year in a customer-facing role (e.g., customer success, account management, or support).
Training Completion	• Completion of an approved CSM preparatory course (e.g., 35+ hours of training).
Code of Ethics Agreement	• Commitment to uphold the professional code of conduct for customer management professionals.

Certification Process

- **Comprehensive Exam**: A rigorous, 180-question exam covering all modules and competencies. A score of 70% or higher is needed to pass.
- **Final Review:** A final review of all submitted materials including the exam, application, and framework.

Examination Content Outline

The Certified Customer Success Manager (CCSM) certification examination reflects the critical knowledge areas, skills, and tasks required to excel as a customer success manager. The exam is designed following the standards for educational and psychological testing and aligns with IACET accreditation requirements. It validates professionals who can effectively manage customer relationships, drive adoption, and ensure long-term customer success.

The CCSM exam includes **180 questions**, with a mix of multiple-choice, scenario-based, and application-oriented questions. Candidates have **230 minutes** to complete the examination. The following outline details the domains, tasks, and enablers that form the foundation of the CCSM certificate:

Domains, Tasks, and Enablers

Domain I: Customer Relationship Management (40%)

Tasks:

1. **Build and Maintain Customer Relationships**
   - Establish trust and rapport with stakeholders.
   - Conduct regular check-ins and QBRs to align on goals.
2. **Proactively Address Customer Needs**
   - Use active listening and empathy in communication.
   - Develop strategies to anticipate and mitigate customer pain points.
3. **Foster Advocacy and Loyalty**
   - Identify and cultivate customer champions.
   - Collaborate with marketing on case studies and success stories.

Enablers:

- Engage customers through onboarding and enablement sessions.
- Create tailored Customer Success Plans (CSPs).
- Use Net Promoter Scores (NPS) and other metrics to measure relationship health.

Domain II: Process and Operational Excellence (40%)

Tasks:

1. **Customer Lifecycle Management**
   - Map and optimize customer journeys.
   - Monitor engagement and adoption metrics.
2. **Risk and Escalation Management**
   - Proactively identify risk signals.
   - Develop escalation frameworks for effective resolution.
3. **Retention and Growth Strategies**
   - Conduct renewal and upsell/cross-sell negotiations.
   - Leverage data to identify expansion opportunities.

Enablers:

- Use CRM tools and dashboards to track customer health.
- Employ segmentation frameworks to prioritize high-value accounts.
- Conduct after-action reviews for churn cases to improve strategies.

Domain III: Leadership and Influence (5%)

Tasks:

1. **Internal Collaboration and Alignment**
   - Build cross-functional partnerships with Sales, Product, and Support teams.
   - Advocate for customer needs in internal roadmap discussions.
2. **Mentorship and Coaching**
   - Mentor team members and peers in customer success best practices.

- ○ Lead initiatives to share knowledge and improve organizational maturity.

Enablers:

- Create dashboards for internal reporting.
- Lead workshops on customer-centric methodologies.
- Present success metrics and ROI to executive stakeholders.

Domain IV: Technical Proficiency and Analytics (20%)

Tasks:

1. **Leverage Tools for Efficiency**
   - ○ Master CRM, data visualization, and communication tools.
   - ○ Optimize workflows using automation and AI-driven insights.
2. **Data-Driven Decision Making**
   - ○ Analyze customer metrics to guide strategic decisions.
   - ○ Use predictive analytics to forecast customer outcomes.

Enablers:

- Generate and interpret customer health scores.
- Implement AI tools for customer insights and automated outreach.

Exam Composition

- **Scored Questions**: 175
- **Pretest Questions**: 5 (unscored)
- **Total Examination Questions**: 180

Time Allocation

- Examination Duration: 230 minutes
- Two 10-minute optional breaks.

Want To Partner with us?

For Employers

- Access to job-ready professionals with validated skills and knowledge.
- Certified candidates who meet industry benchmarks and best practices.

For CSM Leaders

- Opportunity to contribute as an advisor or mentor, shaping the next generation of CSMs.
- Influence curriculum and certification standards to align with real-world needs.

For Advisors

- Collaborate with a pioneering institute to elevate the profession.
- Share your expertise to enhance the program and influence the industry.

Contact Us

Shane Ketterman

Founder, Customer Success Institute LLC

Shane is the founder of the **Customer Success Institutue**, an organization dedicated to establishing the gold standard for excellence in Customer Success Management. With over a decade of experience in Customer Success and Client Management, Shane has honed a deep understanding of what it takes to drive customer satisfaction, loyalty, and business growth.

Shane's professional journey includes earning an MBA and running a successful small business, where his expertise in Customer Success directly contributed to sustained growth and profitability. His hands-on experience has given him a unique perspective on how cultivating meaningful customer relationships can transform businesses of any size.

Motivated by a passion to elevate the Customer Success profession, Shane founded CS Institute to empower Customer Success Managers (CSMs) with the tools, skills, and community they need to thrive. CS Institute serves as a trusted resource for CSMs and organizations alike, setting benchmarks for excellence and advancing the role of Customer Success as a strategic business driver.

Under Shane's leadership, the CS Institute is fulfilling its mission to inspire, educate, and connect professionals, creating a legacy of transformative impact in the field of Customer Success.

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