FIELD NOTES 03 / ENGAGEMENT

Proactive outreach is part of the CSM's job

Bring commercial confidence to account outreach while protecting the relationship.

Where the service includes a CSM, involvement is part of the customer's investment. Taking the initiative matters before a complaint, payment issue, or renewal deadline. Useful outreach combines a clear purpose, earned account context, and a thoughtful way to begin.

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THE CORE IDEA

Understand the customer → Put learning to work → Keep the next step clear

FIELD NOTES 03 / SECTION 01

01. Know which conversation needs to happen

Distinguish between re-engaging an existing account and exploring a new team or use case. Both need relevance and persistence, but their purposes differ.

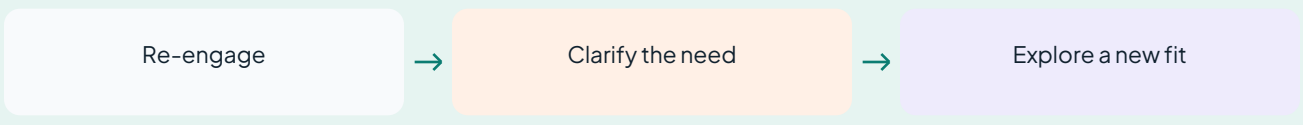
With an unresponsive or dormant account, the aim is to understand what changed and whether the customer is still achieving the expected outcome.

With another business unit, the aim is to test whether a problem the product can solve exists there too. An existing relationship supplies context; it does not establish a need in every part of the organization.

- Re-engagement: What changed, and is the original goal still relevant?
- New use case: Is there a comparable problem worth exploring?
- For either: What evidence supports reaching out?
- What specific next step should the conversation make possible?

> Choose the purpose before choosing the message.

FIELD PATTERN / 01



FIELD NOTES 03 / SECTION 02

02. Use the context the account team has earned

Continuous discovery and value conversations provide a reason to contact the customer. Start with the original problem, the benefits confirmed, and the needs still unresolved.

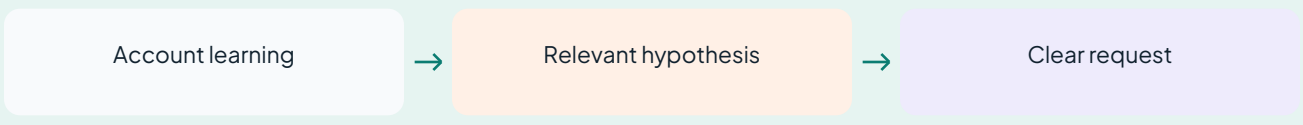
For a disengaged account: “Improving [workflow] was a priority when we last spoke. Is that still the case, or has something changed in the team or project?”

For another unit: “The account team has been supporting [team] with [specific use case]. There may be a relevant connection to your workflow. Would it be useful to compare notes?”

The message still asks someone to consider a conversation. Ground that request in a specific hypothesis rather than a generic assumption that the product must help.

> Earn attention with a relevant reason to speak.

FIELD PATTERN / 02



FIELD NOTES 03 / SECTION 03

03. Ask current contacts for a route into the organization

Before contacting another team, speak with the people already involved. A user, manager, or director may know who owns the workflow and whether an introduction makes sense.

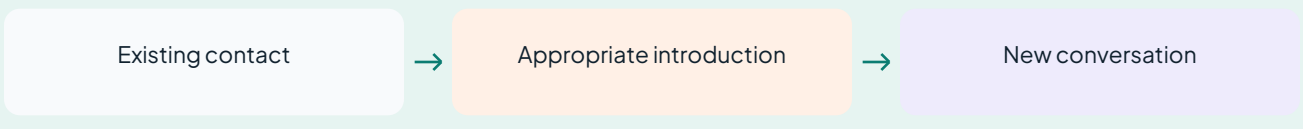
Ask: “Who would be the right person to discuss that process with? Would you be comfortable making an introduction, or with the account team mentioning the work together?”

Describe the existing relationship accurately. An introduction, shared name, or account connection should never become an implied endorsement that the contact has not given. Transparency protects the relationship while making the next step more informed.

- Confirm who owns the relevant problem.
- Ask whether an introduction is appropriate.
- Agree what can be said about the existing work.
- Keep the original contact informed where relevant.

> A route into the organization should come with context and permission.

FIELD PATTERN / 03



FIELD NOTES 03 / SECTION 04

04. Be persistent at a pace that respects the account

Thoughtful follow-up takes patience. Another stakeholder may have different priorities from the original contact. Begin with an appropriate channel and space attempts around the situation.

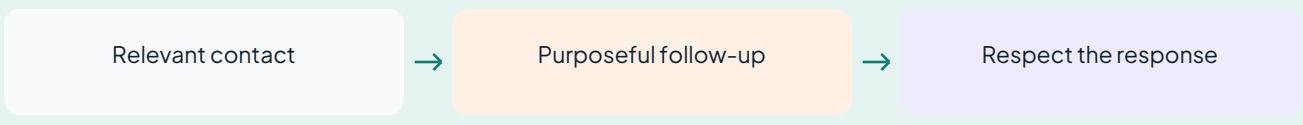
There is no universal number of emails to send. Each follow-up should add something: a better example, a clearer question, or a connection to a priority the customer has identified.

When a person says the topic is outside their scope or that they are not interested, acknowledge the answer and stop pushing. A simple response is enough: “Understood. Thanks for clarifying. Happy to revisit if the situation changes.”

- Use an appropriate business contact route.
- Give each follow-up a purpose.
- Notice signs to continue, pause, or stop.
- Accept a clear no without becoming defensive.

> Persistence is useful only while it respects the relationship.

FIELD PATTERN / 04



FIELD NOTES 03 / SECTION 05

05. Be willing to pick up the phone

Email can become a way to keep preparing without ever having the conversation. A legitimate reason to speak may justify a call or voicemail through an appropriate business route.

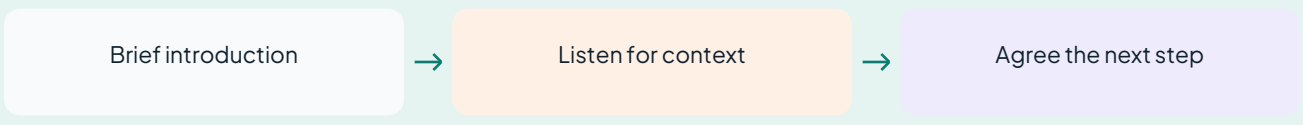
A conversation can reveal context missing from the email exchange: a changed project, a new owner, or a contact who is simply overwhelmed. That can be especially valuable when an existing account has become quiet.

For a new business unit, keep the opening brief: identify the caller, the relevant relationship, the reason for calling, and the question of fit. The first call does not need to carry the entire evaluation.

- Explain who is calling and the relevant account context.
- State one useful reason for the conversation.
- Ask whether the topic is relevant.
- Respect contact preferences and agree an appropriate next step.

> Use the call to establish context and fit, not to force a decision.

FIELD PATTERN / 05



FIELD NOTES 03 / SECTION 06

06. Build urgency around the customer's timing

Useful urgency follows the customer's reason to act. Discovery notes, onboarding conversations, and later reviews can reveal the deadline or decision cycle that matters.

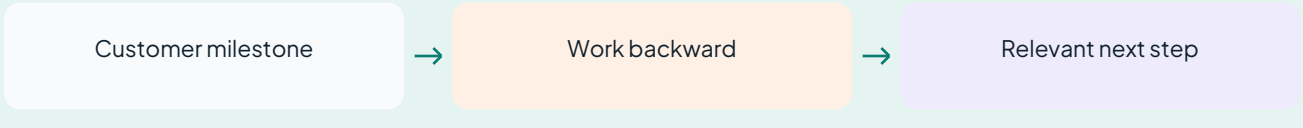
Record that timing and work backward. If a project must launch in a particular month, include evaluation, approval, and implementation lead time before recommending when to begin.

A supplier's fiscal period may explain a desire to close a deal. It is not a substitute for a customer priority.

- A project or implementation deadline.
- An initiative with a specific delivery date.
- A budget planning or approval cycle.
- An operational problem with consequences if it continues.

> Build the timeline around a real customer constraint.

FIELD PATTERN / 06



FIELD NOTES 03 / SECTION 07

07. Use discounting with a clear purpose

Where it is available and commercially appropriate, pricing flexibility can help make a purchase workable. Establish the need, the fit, and the customer's reason to act first.

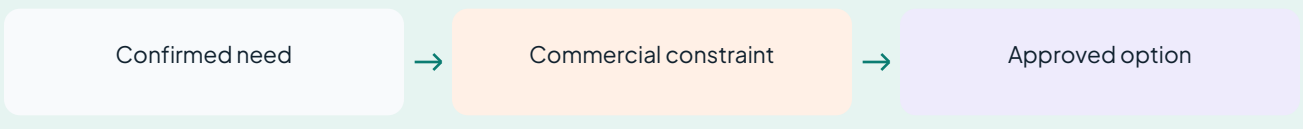
A discount cannot resolve uncertainty about usefulness. Understand the obstacle: a genuine budget constraint, a scope mismatch, or terms that may have an approved alternative.

Any deadline, condition, or commitment must be real, clearly explained, and within the person's authority. The aim is a decision the customer can stand behind, with a relationship the account team can continue to support.

- Validate the need and the fit.
- Identify the specific commercial obstacle.
- Explore scope and approved terms.
- Explain genuine conditions accurately.

> Pricing flexibility should address a real obstacle, not manufacture a reason to buy.

FIELD PATTERN / 07



FIELD NOTES 03 / SECTION 08

08. Check the purpose before the next outreach

Before contacting a quiet account or another business unit, make the purpose, evidence, and request explicit.

Commercial confidence makes it easier to initiate a conversation. Customer context, patience, and accountability determine whether that initiative is useful.

After the conversation, record what changed, what was declined, and which action was agreed. Follow through at the pace the situation warrants.

- Is this re-engagement or exploration of a new use case?
- What is known about the problem?
- Which evidence or example makes contact relevant?
- Has the current contact suggested an appropriate route?
- Can the existing relationship be described accurately?
- What is being asked for now?
- Is there a genuine deadline or decision cycle?
- What would indicate continue, pause, or stop?

> Protect the existing relationship while creating the next useful conversation.

FIELD PATTERN / 08

