FIELD NOTES 05 / COLLABORATION

Be the playmaker for your customer

Work effectively with Sales and Support to give customers a clearer path forward.

CSMs communicate across customers, Sales, Support, Product, and technical specialists. Effective relationships on both sides matter: customer rapport cannot compensate for internal friction, and strong internal relationships need clear customer communication. Being a playmaker means connecting those pieces so the situation moves forward.

IN THIS GUIDE

01 Learn how colleagues work before their help is needed

02 Know enough about the product to make handoffs useful

03 Give Support the technical and business context

04 Use internal relationships to give customers a clear path

05 Work through expectation gaps without a blame game

06 Learn from the teams involved

07 Use a checklist for being a better playmaker

THE CORE IDEA

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

FIELD NOTES 05 / SECTION 01

01. Learn how colleagues work before their help is needed

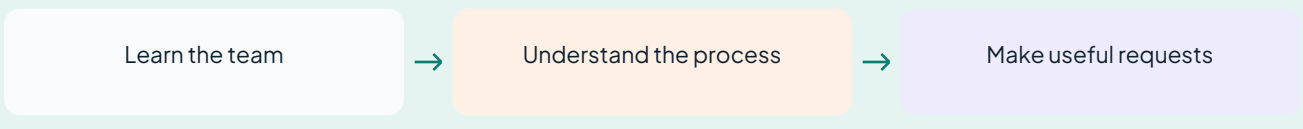
Onboarding is an opportunity to learn the people and processes behind the product. Spend time with Support and Sales, understand how Product evaluates requests, and learn when Sales Engineering gets involved.

Ask what information each team needs and how it prefers to engage. These are the teams the CSM will rely on throughout the customer relationship. Understanding the process early makes later requests more useful.

- What makes a support ticket useful from the start?
- What should happen before an issue is escalated?
- Where are sales commitments and customer expectations documented?
- What context helps Product evaluate a request?
- When is it appropriate to involve a technical specialist?

> Reduce friction internally as well as in the customer conversation.

FIELD PATTERN / 01



FIELD NOTES 05 / SECTION 02

02. Know enough about the product to make handoffs useful

A good relationship with Support includes respecting the work the team does. Learn enough to recognize common issues, attempt appropriate quick fixes, and describe the situation clearly.

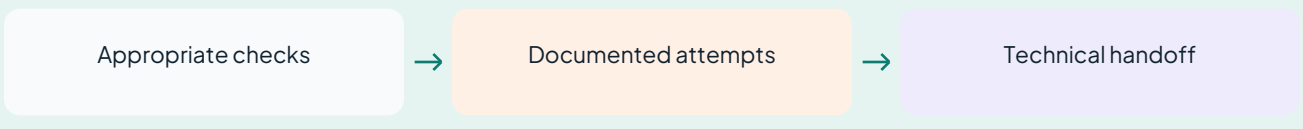
Recognize the limits of the CSM role. Some troubleshooting may be appropriate, but prolonged investigation outside that expertise can delay resolution and crowd out other responsibilities.

When raising an issue, document the steps already attempted and what did not work. This creates a starting point for the next person and can prevent the customer being asked to repeat the same checks.

- Recognize common issues and relevant product behavior.
- Attempt checks that fit the role and the company process.
- Record the evidence and steps already tried.
- Bring in deeper technical expertise at the right point.

> A useful handoff makes it easier for the next person to take action.

FIELD PATTERN / 02



FIELD NOTES 05 / SECTION 03

03. Give Support the technical and business context

A useful escalation explains what is happening and why it matters. Give the technical team enough detail to investigate and enough account context to understand the impact.

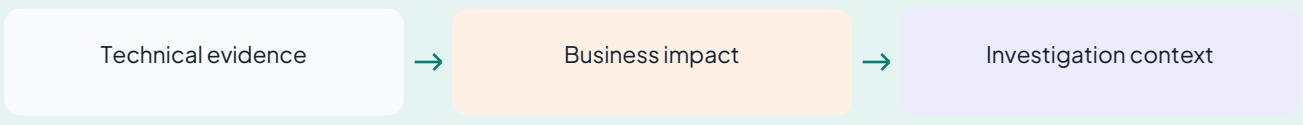
Account size, renewal timing, and deadlines can be relevant, but they should sit alongside technical severity and the company's escalation criteria.

Distinguish evidence from suspicion. "This workflow stopped after this change" is a useful observation. A broad statement that the product is broken gives the team much less to investigate.

- What the customer is trying to accomplish.
- What is happening instead, with examples or evidence.
- Who is affected and whether a workaround exists.
- What has already been checked or attempted.
- The effect on the customer's workflow.
- Relevant deadlines, renewal timing, or account context.

> Pair the observed behavior with the customer impact.

FIELD PATTERN / 03



FIELD NOTES 05 / SECTION 04

04. Use internal relationships to give customers a clear path

Internal coordination becomes visible in external communication. Explain why another team is being involved, which information it needs, and what the customer should expect next.

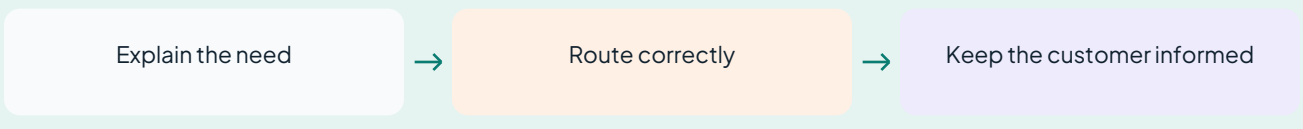
A useful message might be: “A technical specialist can review this workflow through the agreed escalation process. The handoff will include the account context and the steps already attempted.”

Follow the company’s engagement process. Knowing someone internally does not authorize a promise about their availability or deadline. The CSM still has a role in keeping the customer informed and ensuring the handoff progresses.

- Explain why the additional expertise is relevant.
- Provide the context needed for the next step.
- Confirm availability through the correct process.
- Keep the customer informed of status and ownership.

> Coordinate the next step without making commitments on another team’s behalf.

FIELD PATTERN / 04



FIELD NOTES 05 / SECTION 05

05. Work through expectation gaps without a blame game

When a customer says a capability was promised during the sale, establish what happened. The cause may be missing handoff information, a misunderstanding, or an expectation set incorrectly.

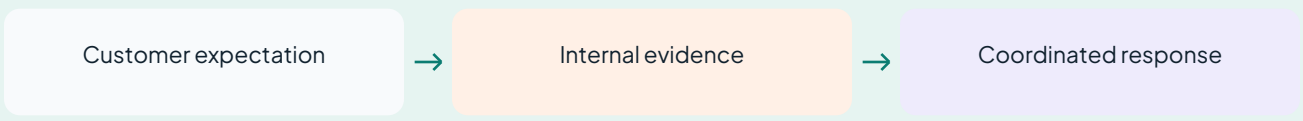
Ask what the customer understood, review the notes, and speak with the colleagues involved. Return with an honest explanation of what is possible and a realistic next step.

Acknowledge mistakes when they occurred. Resolve internal disagreements through the appropriate channels; the customer should not have to navigate a dispute between the account executive and the CSM to get an answer.

- Clarify the customer's understanding.
- Review the available evidence and internal context.
- Acknowledge any incorrect expectation.
- Explain limitations and a realistic way forward.
- Improve the handoff or expectation-setting process.

> Present a coordinated response while remaining honest about the gap.

FIELD PATTERN / 05



FIELD NOTES 05 / SECTION 06

06. Learn from the teams involved

Cross-functional relationships can improve the CSM's own practice. Sales colleagues demonstrate how to ask questions, run discovery, and understand the business problem behind a request.

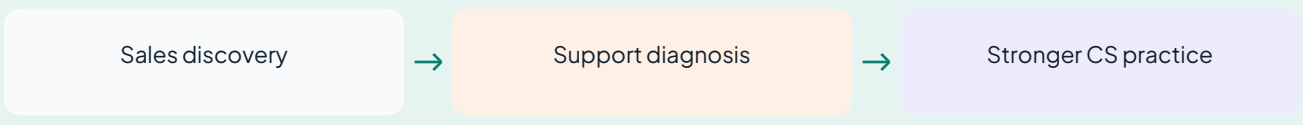
Support colleagues can help refine diagnosis, improve follow-up questions, and distinguish a product limitation from a misunderstanding or broken workflow.

Over time, this learning improves the work before a handoff is needed. The CSM recognizes missing information, asks more useful questions, and involves the right people sooner.

- Observe how Sales explores the problem behind a request.
- Learn how Support narrows down a technical issue.
- Apply those questions in customer conversations.
- Use feedback to make future handoffs more complete.

> Internal collaboration builds better customer judgment as well as better relationships.

FIELD PATTERN / 06



FIELD NOTES 05 / SECTION 07

07. Use a checklist for being a better playmaker

Before involving another team, check that the request is clear, well supported, and routed through the right process.

The CSM may not own the technical answer or next decision, but can still help keep the situation moving. The customer experiences the combined work of the company, including the quality of the handoffs between teams.

- Is the customer's intended outcome understood?
- Has the information this team needs been gathered?
- Are the steps already attempted documented?
- Is the correct engagement or escalation process being followed?
- Is the business impact described accurately?
- Does the customer know what happens next?
- Is the next action owner clear?
- Who will communicate the update, and when?

> Strong internal relationships matter most when they create a clearer customer experience.

FIELD PATTERN / 07

