



TRAINING

CSM (Customer Success Manager)

LEARNING OBJECTIVES

- Understand the strategic role of the Customer Success Manager in client retention
- Implement a proactive client support approach
- Develop skills in client relationship, analysis and portfolio management
- Master CRM tools, KPIs and satisfaction processes

TRAINING DURATION

2 days (14 hours)

TARGET AUDIENCE

Customer service, sales relationship and client success professionals

PREREQUISITES

None

ACCESS TIME

Eligibility based on application and interview with the Experience team: response within 48 hours.

PRICE

- Inter-company training: €1,490 excl. VAT per person
- Intra-company / tailor-made training: on request

Crews Education

3 rue Lac du Mont-Cenis, BP 70408, 73370 Le Bourget du Lac, FRANCE

Tél : +33 (0)4 80 81 94 50 - Email : contact@crews-education.com

www.crews-education.com



DETAILED PROGRAM

- Understanding the role of the Customer Success Manager
 - Evolution of the role: from support to client success
 - Scope and key missions: onboarding, follow-up, upsell, retention
 - CSM vs Account Manager vs Support: clearly defining responsibilities
- Implementing a Customer Success strategy
 - Client portfolio segmentation
 - Setting up personalised follow-up plans
 - Using CRM tools and client dashboards
- Communicating with impact
 - Active listening techniques and advisory posture
 - Managing objections, frustration and dissatisfaction
 - Building a lasting and proactive client relationship
- Monitoring and measuring performance
 - Choosing the right KPIs: churn, NPS, adoption rate, retention
 - Driving satisfaction and client lifetime value
 - Organising client reviews (QBRs) and generating actionable feedback
- Practical workshop
 - Case study based on a SaaS or B2B service company
 - Identifying opportunities, drafting a success plan
 - Client pitch and follow-up simulation

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CAREER OPPORTUNITIES, PATHWAYS AND FOLLOW-UP COURSES

At the end of the training, learners will be able to take on a Customer Success Manager role, build an effective support strategy, and actively contribute to customer retention and revenue growth.

TEACHING METHODS, RESOURCES AND SUPPORT

- Training delivered by professionals actively working in the digital field
- Varied and dynamic teaching methods (case studies, workshops, assignments)
- Individual support by the Experience team

TRAINING TOOLS

- High-performance digital tools: Google Workspace for Education, Edusign...
- Practical case studies based on real-life business situations

EVALUATION METHODS

- End-of-training assessment via quiz or project submission

RESULTS AND PERFORMANCE INDICATORS

- Satisfaction rate at the end of training: NA
- Individual progress rate: NA

ACCESSIBILITY

Accessibility for people with disabilities or specific difficulties, contact us to organize an interview and offer you a program adapted to your needs: handicap@crews-education.com

Accessibility to international attendants, contact us: international@crews-education.com

CONTACTS

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- By WhatsApp: +33(0)7 56 10 93 20
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