



The  
**CSCYCLE**

experience growth

# CSM Account Handover



## Internal Preparation and Alignment

- What is the **reason** for changing the CSM?
- **Background:** Use case, Meeting notes ,Account plans, QBRs, etc.
- Future **priorities** and **commitments**
- **Stakeholders**
- Ongoing – Open tickets, Feature requests, etc.
- Opportunities/Risks
- Plan the **transition** and **communication** to the customer



## Handover Objectives

- **Seamless transition** (nothing “falls between the cracks”)
- **ZERO impact** on the customer (“**Show MUST GO ON**”)
- Minimize the duration of the new **CSM getting up-to-speed**



## Customer Facing Activities

- Preliminary communication (The reason for the change)
- Explain the **timelines** and handover process
- Assess customer **sentiment** and address any issues promptly.
- Allow some time for **overlap** between the two CSMs
- **Follow up** after transition

# THANK YOU!



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