

Customer Success Manager

AI Prompt Library: High-Value Prompts by Common Motion

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Each prompt is designed to be pasted into an AI assistant with your specifics filled in. CSM prompts require real account data to produce useful output — paste your actual notes, health data, and usage context. Review all output before sending to customers.

01 QBR / EBR PREPARATION

QBR / EBR PREP

Build a Quarterly Business Review Agenda and Opening

When to use: 1-2 weeks before any QBR or EBR — not the night before.

Customize: [CUSTOMER NAME], [ARR], [HEALTH DATA], [USAGE SUMMARY], and their original success criteria.

I'm a CSM preparing a Quarterly Business Review for [CUSTOMER NAME]. Account data: ARR [AMOUNT], tenure [X MONTHS], health score [SCORE/TIER], product usage summary: [PASTE — e.g., DAU, feature adoption %, support ticket volume]. Their original success criteria when they bought: [PASTE FROM DEAL NOTES]. Open issues or at-risk signals: [LIST OR WRITE 'NONE']. Expansion products they could be using but are not: [LIST OR WRITE 'N/A']. Build a QBR agenda that: (1) Opens with their business outcomes — not our product metrics. (2) Shows measurable progress against their original success criteria. (3) Addresses open issues honestly without dwelling on them. (4) Identifies 1-2 expansion opportunities framed as business outcomes. (5) Closes with aligned next steps with owners and dates. Also draft the opening 2-minute framing I can deliver to open the meeting.

02 AT-RISK ACCOUNT MANAGEMENT

AT-RISK ACCOUNTS

Build a 30-Day Save Plan for a Disengaged Customer

When to use: As soon as a customer shows two or more declining health signals.

Customize: [CUSTOMER NAME], [ARR], [RENEWAL DATE], and the specific warning signs you are seeing.

I have a customer at [COMPANY] showing the following warning signs: [LIST: e.g., product logins dropped 60% in 30 days, no response to 2 emails, 3 open support tickets, missed last QBR, champion recently changed roles]. ARR: \$[AMOUNT]. Renewal date: [DATE]. Tenure: [X MONTHS]. What they were trying to achieve when they bought: [PASTE ORIGINAL GOALS]. Help me: (1) Identify the most likely root cause of disengagement based on the signals. (2) Build a 30-day save plan with specific actions, owners, and timelines. (3) Draft an outreach email to the champion that acknowledges the issue without being alarming or apologetic. (4) Recommend whether executive escalation (my VP or their exec) is appropriate now, and if so, what the framing should be.

03 EXPANSION IDENTIFICATION

EXPANSION

Identify and Frame Expansion Opportunities for a Specific Account

When to use: When an account is healthy and approaching a natural expansion trigger.

Customize: [CUSTOMER NAME], [CURRENT CONTRACT], [USAGE DATA], and any known trigger events.

I need to identify and frame expansion opportunities for [CUSTOMER NAME]. Current contract: [PRODUCT/TIER, ARR AMOUNT, SEATS OR USAGE LIMITS]. Usage data: [PASTE — e.g., hitting seat limits, high feature adoption in X area, new team onboarded in last 90 days]. What I know about their business: [TRIGGER EVENTS — new hire, product launch, geographic expansion, funding round]. Expansion products or tiers available: [LIST]. Help me: (1) Identify 2-3 realistic expansion opportunities that make sense for where they are right now — not aspirational upsells. (2) Frame each opportunity as a business outcome, not a product upgrade. (3) Draft a conversation-starter message I can use to open the expansion discussion with the champion — conversational, not a pitch. (4) Identify the right stakeholder to involve in each opportunity and when.

04 RENEWAL PREPARATION

RENEWAL

Prepare the Renewal Conversation and Assess Risk

When to use: 60-90 days before the renewal date — not 30 days.

Customize: [CUSTOMER NAME], [ARR], [RENEWAL DATE], [HEALTH SCORE], and any open issues.

I'm preparing for a renewal conversation with [CUSTOMER NAME]. Account summary: ARR \$[AMOUNT], renewal date [DATE], health score [SCORE], tenure [X MONTHS], champion: [NAME, TITLE, TENURE IN ROLE]. Usage trend last 90 days: [GROWING / FLAT / DECLINING + BRIEF DETAIL]. Open issues: [LIST OR 'NONE']. Relationship with economic buyer: [STRONG / SURFACE-LEVEL / NOT ESTABLISHED]. Help me: (1) Assess renewal risk — LOW / MEDIUM / HIGH — with a 2-sentence rationale. (2) List the 3 things I need to confirm or resolve before the renewal conversation. (3) Draft a renewal kick-off email that opens positively and sets the agenda without making it feel transactional. (4) Anticipate the 2 most likely negotiation positions they might take and suggest how to respond to each.

05 ONBOARDING PLAN

ONBOARDING

Build a 90-Day Onboarding Plan Anchored to Time-to-First-Value

When to use: Within 48 hours of a deal closing — before your first customer call.

Customize: [CUSTOMER NAME], [PRODUCT/TIER], [STAKEHOLDERS], [SUCCESS CRITERIA FROM DEAL], [TECH ENVIRONMENT].

I'm onboarding a new customer, [COMPANY]. What they bought: [PRODUCT / TIER / SEATS]. Key stakeholders: [LIST NAMES, TITLES, AND ROLES IN THE IMPLEMENTATION]. Their stated success criteria from the deal: [PASTE]. Technical environment: [BRIEF: CRM, data tools, IT contact if known]. Contract start date: [DATE]. Build a 90-day onboarding plan that: (1) Identifies the single most important 'time-to-first-value' moment and builds the plan backward from it. (2) Defines milestones at Day 7, Day 30, Day 60, and Day 90 with specific deliverables and customer-side owners. (3) Includes a check-in cadence and an escalation path if milestones slip. (4) Identifies the top 2 risks to a successful onboarding and how to mitigate them. Format as a plan the customer could read and sign off on.