

# CARES

C A R E S  
CS METHODOLOGY

## Coaching Guide

Customer Care Methodology

Manager reference for coaching CS teams on the CARES framework

**C**

Connect

**A**

Assess

**R**

Resolve

**E**

Expand

**S**

Sustain

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# How to Use This Guide

This coaching guide is designed for CS managers running 1:1s, account reviews, or team training sessions using the CARES framework. Use it to structure coaching conversations, identify rep skill gaps, and build consistent proactive CS habits across your team.

## Coaching Questions

Use these in 1:1s or account reviews. They are designed to reveal whether the rep is working the CARES stages proactively or reactively.

## Red Flags

Warning signals that indicate a rep is not fully applying CARES. Surface these early and address them with specific stage work.

## Coaching Scenario

A real-world situation to walk through with your rep. Compare their response to "What Good Looks Like" to identify coaching moments.

## Mastery Indicators

Use these to assess rep readiness and set development goals. A rep demonstrating all five is CARES-certified in practice.

# CARES

## Customer Care Methodology -- CS Methodology

Connect | Assess | Resolve | Expand | Sustain

### PURPOSE

Help CS managers coach reps to move from reactive firefighting to structured, proactive customer success using the CARES framework.

### MANAGER COACHING QUESTIONS

- Walk me through the Connect you ran with [customer]. What success criteria did you align on?
- What's the current health score for this account? Which CARES dimension is the biggest risk right now?
- What's on your Resolve backlog for this account? Who owns each item and when is it due?
- What signals are you tracking for Expand? What's your expansion hypothesis for the next QBR?
- When does this account renew? What's your Sustain plan and when does it formally start?

### RED FLAGS TO WATCH

- Rep can't articulate what success means to the customer
- Health score hasn't been updated in 30+ days
- No Resolve backlog exists -- 'everything's fine'
- Expansion conversation only comes up at QBR, not between them
- Renewal discussion starts less than 60 days out

### COACHING SCENARIO

#### SETUP

A CSM has an account renewing in 90 days. They're in 'Assess' but haven't started Resolve or Sustain. Account health is yellow across two dimensions.

#### WHAT GOOD LOOKS LIKE

The CSM builds a joint success plan, runs an EBR to re-align on outcomes, proactively opens the Sustain conversation, and creates a Resolve sprint to close health gaps before renewal.

### MASTERY INDICATORS

- 1 Runs structured Connect conversations with every new account in week 1
- 1 Maintains current health scores for all accounts -- no unknowns
- 1 Resolve backlog is part of weekly account planning
- 1 Expansion conversations happen between QBRs, not just at them
- 1 Sustain motion starts automatically at the 90-day renewal mark