The Call You Should Have Had

CS Enablement Program | Step 2: Live Session

Customer Success Team | 2026

The program — four initiatives over five weeks

	Initiative	Description	Format	Timing	Pillars
1	**Product Value Guide + Quiz (Self-guided)**	Barb shares the guide on June 8. CSMs complete a 20-question quiz covering MSP product value propositions, feature-level knowledge, cross-product scenarios, and Engage. Deadline: June 22.	Async	June 8 → June 22	Pillar 1
2	**The Call You Should Have Had (Live Training)**	60-min session with the full team. Contrasting call roleplay, prep framework introduction, live application with real customers.	Full Team	June 25	Pillars 1+2
3	**Strategic Scenario Quiz (Self-guided)**	Scenario-based quiz distributed June 29. Tests strategic judgment — including Engage-readiness as a dimension of every customer conversation.	Async	June 29	Pillars 2+3
4	**Roleplay Sessions by Manager (Team Meeting)**	60-min session per manager. Each CSM arrives with a real customer prepared using the prep checklist. Manager facilitates, having reviewed quiz responses as coaching input — also used in 1:1s. At least one Engage-ready customer roleplayed per session.	Manager Level	Week of July 6	Pillars 2+3

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What we're doing today

01 — 15 min

The Contrast

Two versions of the same call — what changes everything?

03 — 25 min

Live Application

Pick a real customer and apply the framework now

02 — 15 min

The Prep Framework

A simple checklist you can use before your next call

04 — 5 min

The Commitment

One upcoming call where you use this approach

Part 1

The Contrast

Same customer. Same week.
Two completely different calls.

Jordan — Financial Services

Litmus + Everest | Litmus Proof & Email Guardian never activated

CALL A — The Metrics-Focused CSM

Customer: Jordan, Email Operations Manager @ a financial services company. Products: Litmus + Everest

CSM

Hey Jordan! Quick check-in — pulled up your Everest dashboard before the call. Inbox placement is at 89%, reputation is clean. I do see it's running a bit low on Microsoft specifically — I'd probably look at tightening your engagement window there, focus on contacts who've engaged in the last 30 days or so.

Jordan

Okay, good to know. Yeah, it's been a pretty normal month for us.

CSM

Good. Litmus side looks fine too, you've been running tests. Anything specific you wanted to cover today?

Jordan

Not really. We just had a big product launch campaign last week so I wanted to make sure nothing looked off.

CSM

Yeah, nothing else jumping out. I'd just keep an eye on that Microsoft placement and tighten that engagement window before the next send. I'll keep monitoring and flag anything that comes up.

CALL A — The Metrics-Focused CSM

CSM

Oh, one more thing before we wrap — we just launched something new in Litmus. Gmail is now using Gemini AI to summarize emails in the inbox. You can now preview how Gmail is summarizing your emails before you deploy. Pretty cool!

Jordan

Nice, I'll take a look!

CSM

Great, talk soon!

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⏱ **Call: ~10 minutes**

CALL A — The Metrics-Focused CSM

What just happened?

Generic recommendation, no investigation

The CSM flagged Microsoft placement but gave a generic fix — without asking about the product launch Jordan just mentioned.
The CSM suggested "tightening your engagement window" but didn't ask about current engagement window.

The launch was a signal — and it was ignored

Jordan said 'we just had a big product launch.' That's a list composition question, a BriteVerify conversation. That's is a discovery opportunity. The CSM heard it and moved on.

No questions, no context

The CSM never asked about upcoming projects, goals, or what was coming next. They have no idea what Q3 looks like for Jordan.

No next step

'Talk soon!' is not a next step. Jordan ends the call exactly where she started. The CSM is now fully reactive.

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CALL B — The Strategic CSM

Customer: Jordan, Email Operations Manager @ a financial services company. Products: Litmus + Everest

CSM

Hey Jordan! Before we jump into the numbers — I was looking at your account before the call and noticed you seeded 5 campaigns in the last 10 days, and they all seem to be related to a new product launch. Is that right?

Jordan

Yes! We just wrapped the main launch send for Q2 last week.

CSM

That's exciting. I was actually reviewing our conversation about your goals and objectives for this year — I remember you mentioned your company was planning to do a big product launch per quarter. This is that one, right?

Jordan

Exactly, yes — Q2's launch.

CSM

Love that. How did it go? And are there follow-up emails still going out as part of this launch, or was last week the main send?

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⏱ Call: still going…

CALL B — The Strategic CSM (continued)

Jordan

There are a few more going out this week — nurture emails for people who opened but didn't convert.

CSM

Are those emails already in Litmus?

Jordan

Not yet, no.

CSM

Can you send them over so I can take a look and make sure everything is good before you deploy?

Jordan

Yeah, absolutely.

⏱ **Call: still going…**

CALL B — The Strategic CSM (continued)

CSM

Awesome. Once you send it, I'll review and send a follow up email. One thing I want to flag — your inbox placement on the main launch came in at 89%, and where you normally perform is closer to 95%. A 6-point drop in a product launch like this, means a large portion of your audience never saw the campaign — and that has a real impact on the success of the launch. For this send, did you go broader than usual on the list?

Jordan

Yes, we wanted to maximize reach for the launch so we pulled from a wider segment.

CSM

That's likely what affected placement. Do you know if those addresses were validated before the send — confirmed as still active?

Jordan

Honestly no. I don't think so. We just pulled them from the database.

CSM

Really common, but that's where you lose placement fast. You know you have a validation service in your contract — BriteVerify — that checks addresses directly with the providers before you send and flags anything risky or invalid. For a launch where you're going broader, that's exactly where it pays off. Worth setting up before the next one?

Jordan

Yes, I didn't realize we could do that upfront.

⏱ **Call: still going…**

CALL B — The Strategic CSM (continued)

CSM

Yes, that is the whole idea of BV. And while I'm looking at these templates — how does your team typically review and approve emails before they go out? What does that process look like?

Jordan

Honestly it's a mess. Versions going back and forth in email, different people commenting in different threads — legal sign-off alone takes almost two weeks sometimes.

CSM

Two weeks is a lot, especially for a time-sensitive launch. You actually have Litmus Proof in your account and it's never been activated — it centralizes the whole review process, comments, status, legal sign-off in one place. Teams usually cut that time in half. Do you have a few minutes now for me to show you, or would you prefer a dedicated call?

Jordan

Let's set up a separate call — I'd want our creative lead on that one too.

⏱ **Call: still going…**

CALL B — The Strategic CSM (continued)

CSM

Perfect, I'll send a calendar invite after this. And looking ahead — when is Q3's launch planned?

Jordan

We're targeting September. Early stages of planning right now.

CSM

Good timing to loop us in early. Before the next launch, I'd love to be involved from the start — help you think through the contact list, the email templates, the send strategy. That's where we can make the biggest difference. Can we put a placeholder on the calendar for a planning session in the next few weeks?

Jordan

That would actually be really helpful, yeah.

⏱ **Call: still going…**

CALL B — The Strategic CSM

CSM

One more thing before we wrap — we just launched something in Litmus that's really relevant for this big launches. Gmail is now using Gemini AI to summarize emails directly in the inbox. Users are starting to rely on those summaries instead of reading the full email — which means open rates, click rates, everything is affected by how well the AI captures your message. With Litmus you can now preview exactly how Gmail is summarizing your emails before you deploy. For a launch where a specific message needs to land — that's critical.

Jordan

Wait, I didn't know that was even possible. That's something I'd definitely want before September.

CSM

I'll include it in the calendar invite. So to recap: Proof walkthrough with your creative lead, BriteVerify before the next send, planning session for Q3 launch, and Gemini summary previews. Sound good?

Jordan

Yes. Thank you!

Prep (20-30min): Noticed 5 campaigns seeded in last 10 days — all product launch related. Reviewed account goals & objectives. Reviewed unused features.Litmus Proof never activated, Email Guardian inactive. Everest: placement 89%, Microsoft dip.

Group Discussion

What did you notice?

1. What was the single biggest difference between the two calls?

2. What did Call B’s CSM know before joining that Call A’s CSM didn’t?

3. Think of one customer you spoke with recently. Which call does yours look more like?

CALL B — What made the difference?

✓ Never stopped asking questions

Every product, every insight, every next step came from a question. Without questions, there's no consulting.

✓ Metrics anchored in their reality

A 6-point drop in a product launch means a large portion of the audience never saw the campaign. The CSM connected the metric to a real business problem.

✓ Usage gaps through their words

The CSM didn't say 'you're not using Proof.' They asked about the review process — Jordan described the nightmare herself.

✓ Reviewed goals & objectives, brought them to the call

The CSM connected what Jordan shared to documented account goals — ensuring relevance, not just a metrics review.

✓ Asked about the roadmap and upcoming priorities

The CSM asked about Q3's launch and positioned Validity as a partner in planning, not just a tool for reporting what already happened.

✓ Brought a meaningful proactive insight

The Gemini AI feature wasn't reactive — it was relevant to Jordan's context. She didn't know she needed it. That's what builds a trusted advisor.

✓ The call ended with momentum

Four concrete next steps. Jordan is already thinking about September. The CSM is now part of the Q3 planning process.

Part 2

The Prep Framework

5 questions. 10 minutes. A completely different conversation.

The Pre-Call Prep Checklist

★

What do I want to happen before I hang up?

Not just check in.' A real outcome: 'I want to activate Email Guardian today.' 'I want to understand Q3 priorities.' If you can't answer this before joining, you're not ready.

1

What are they using — and what are they NOT using?

Open their products before every call. Check every feature. Write down what's inactive. Unused features = opportunities to add value — if you connect them to something they care about.

2

Review your account before every call

ChurnZero — CS Value Drivers and account notes. What are their goals and priorities? **Gong** call recordings — What deserves follow through? What comes next?. **Recent support tickets.**
The more you know about what your customer is working toward, the easier the renewal conversation becomes — you're not selling value, you're showing it.

3

What is their business context right now?

Industry trends, recent company news, upcoming campaigns or events. 2 minutes of research changes everything.

4

If you spot a problem, connect it to their business

A deliverability issue isn't just a number — it's emails not reaching inboxes before a major campaign. Always ask: what does this mean for what they're working on right now?

5

What's one insight I can bring that they aren't expecting?

Check Validity product updates, the Litmus blog, or Everest release notes. Is there anything new that maps to what this customer is doing right now?

Use Dante to help you prep — **Dante was built for you**. Ask it to summarize recent account activity, surface open items from past Gong calls, check support tickets, and pull business context — all in one place. Before your next call, try: *"Help me prep for my call with [contact] — summarize their business context, platform usage, and any open items"* in Slack or Salesforce. Use it.

When to loop in your Account Manager

Your prep (and your customer calls) should flag situations where the AM needs to be involved. You don't own the relationship alone — use each other.

Signal	Your move
! **Customer is barely using the product**	**Driving awareness and usage is on you first — own it**. Understand why: is it awareness, capability, or fit? If it's fit, loop in the AM before renewal. If it's awareness, that's your opportunity to drive value.
! **Your champion left or a key contact changed**	This is a risk signal — don't wait. Flag it to the AM immediately. A new POC means starting the relationship from scratch, and a lost champion means the account has lost its internal advocate. Act as a team to engage the new contacts and rebuild the relationship together.
! **Customer mentions a new company initiative with commercial potential**	Not every initiative is a commercial signal — but when it is, flag it to the AM right away. They can follow up on expansion, and you stay in your lane as a trusted partner.
! **Customer is using a competitor alongside Validity**	Don't try to handle this alone. Loop in the AM to understand the risk and decide together on the right response.

These are a few examples. There will be other situations where getting the AM involved is necessary (risk, happy customer, upsell opp...)

Positioning usage gaps: say this, not that

Never make a customer feel audited. Connect the gap to something they already told you they care about.

Don't say:	Say this instead:
❌ *"I noticed you're not using Litmus Proof at all. Why not?"*	✔ *"You mentioned your review process takes two weeks — I'd love to show you Proof, which other teams have used to cut that in half."*
❌ *"You have access to MailCharts but I don't see any activity there."*	✔ *"With holiday campaigns coming up, MailCharts could be useful for seeing what competitors in your space are doing — do you have 5 minutes for me to show you how you can use it?*
❌ *"Your Everest usage is really low. Are you actually using this?"*	✔ *"I want to make sure Everest is set up in a way that's useful for your team. Everest insights play a critical role in campaign success. What does your current deliverability look like?"*

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Part 3

Your Turn

Pick a real customer. Use the checklist. Find the gap.

10 minutes — do this now

Open ChurnZero and pick one account where you have value drivers documented and an upcoming call or check-in in the next two weeks.

1. Review their value drivers in ChurnZero. What do you actually know about their business priorities right now? (If you're not sure, that's your answer.)
2. Pull up their account. What features or products are they NOT using that they have access to?
3. Pick ONE gap. Why might they not be using it? What would make it relevant to them?
4. Write one question you'd ask to open that door — without making them feel like they're being evaluated.
5. Is there anything here that warrants a conversation with your AM before the call?

Share what you found

We'll hear from 2 people. You don't need to have all the answers.

Which customer did you pick, and why?

What usage gap did you find that you hadn't noticed before?

What's the one question you'd ask to open that door — without making it feel like an audit?

Once you open that conversation — what's your follow-through plan to get them actually using it?

Part 4

The Commitment

One call. One customer. One different conversation.

Before you leave today

This is not aspirational. It's a specific, trackable commitment.

My commitment:

I will use the prep framework before my call with

[customer name]	on	*[date]*

I'll share what happened with my manager.

What happens next

→ After the call, share one thing that went differently — a win or a miss — with your manager

→ Your manager will follow up in your next 1:1: "Which customer did you use the prep framework for this week?"

→ Continue to have value/discovery conversations with your customer and logging CS Value Drivers in Churnzero.

The difference between a good CSM and a great one

is not what they know.

It’s what they ask and the VALUE they show.