Comodo Customer Success Operations

Customer Success Manager (CSM) Workflows and Responsibilities

VERSION CONTROL

Version Number	Date	Author	Description
1	08.21.2019	Loretta Harry	Workflow and Responsibilities for Customer Success Manager
2	08.23.2019	Loretta Harry	Edited workflows
3			
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1.0 Purpose

The Purpose of this document is to detail and outline the phases, roles, and responsibilities of Comodo's Customer Success Manager. After document review, there will be a clear understanding of the processes that encompass the Customer Success manager's roles and responsibilities.

2.0 Flow Chart
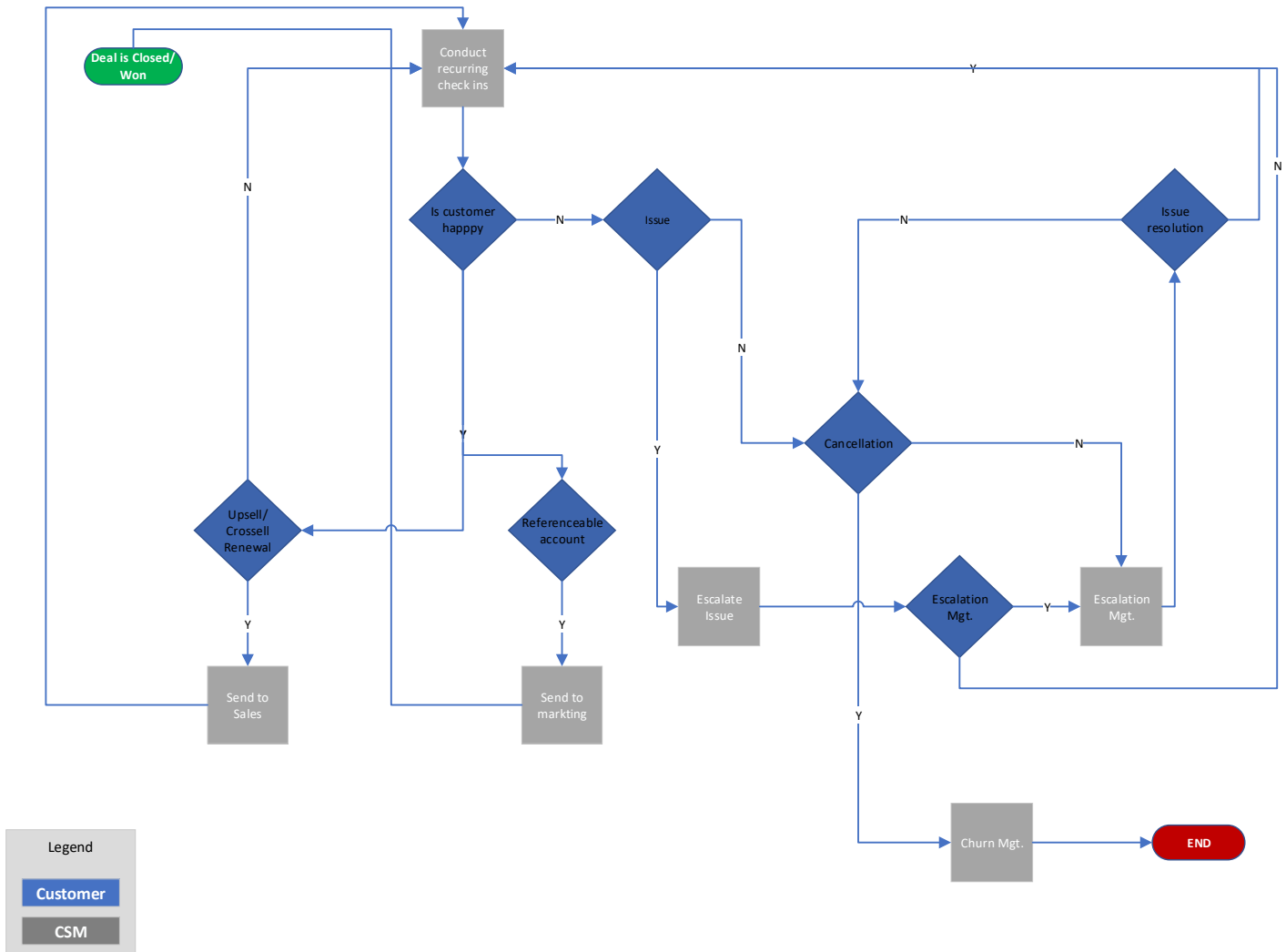
3.0 Task and Responsibilities Breakdown

Task	Action	System	Human
1.1	• Deal is Closed/Won		X
1.2	Conduct Recurring Check ins: a. Is Customer Happy? IF Yes: b. Upsell/Crossell/Renewal: • Select Sales inquiry in sales stage • Select Green under priority • Update description accordingly • Send e-mail with vtiger opportunity to sales team • Continue recurring check ins c. Referencable account: • Select Referencable under product dropdown • Select Green under priority dropdown • Update description accordingly • Send cutomer details to marketing team Continue recurring check ins		X
1.3	Is Customer Happy? If No: a. Identify the issue b. Escalation/Escalation Mgt: • Create activity with Customer Issues/Esaclation as subject • Track/Monitor support tickets • Select red under priority dropdown		X
1.4	Is issue resolved? If No proceed with Cancelation a. Churn Mgt: • Create activity with Churn Management as subject • Select red under priority dropdown Udate description accordingly		X