



5 FREE PROMPTS FROM THE CSM'S AI TOOLKIT

CSM AI Starter Kit

aitoolkitshop.com →

CSM AI Starter Kit

5 Free Prompts from The CSM's AI Toolkit

This is a sample of The CSM's AI Toolkit — 5 prompts pulled from the full collection of 31. Each one covers a different stage of the customer success lifecycle.

Why these aren't generic prompts. Most AI prompts for customer success are variations of "write me a professional email." The output sounds like AI wrote it, and you spend more time editing than you saved. Every prompt here is built for a specific CS task — the context, tone, and format are already baked in. That's why the output reads like a CSM wrote it, not a chatbot.

What's inside:

- 1. Customer Welcome & Introduction Email** — Make a strong first impression the day the deal closes
 - 2. Check-in Call Follow-Up Email** — Turn messy call notes into structured follow-ups with action items
 - 3. QBR Executive Summary Generator** — Feed in data and milestones, get a polished executive summary back
 - 4. Re-engagement Email (Gone Dark Customer)** — Break through silence without sounding desperate
 - 5. Customer Data Anonymization Guide** — Use AI safely with customer information
-

How to use: Copy the prompt, paste it into ChatGPT, Claude, Gemini, or any AI tool, replace the [BRACKETED_PLACEHOLDERS] with your details, and run it.

Onboarding & First Impressions

#1 Customer Welcome & Introduction Email

Onboarding

- A new account just closed and you've been assigned as the CSM. You need to send the first touchpoint that introduces you, sets expectations for onboarding, and makes the customer feel like they're in capable hands -- not like they've been tossed into a queue.

THE PROMPT

I'm a Customer Success Manager writing a welcome email to a new customer after the sales-to-CS handoff. Write a warm, professional welcome email that accomplishes the following:

1. Introduce myself as their dedicated CSM and explain my role (strategic partner, not support ticket router)
2. Reference specific details from their sales process so they know I've done my homework
3. Set clear expectations for the onboarding timeline and what the first 30 days look like
4. Include a specific call-to-action to schedule our kickoff call
5. Briefly mention what they should prepare or think about before the kickoff

Keep the tone confident but approachable. No corporate fluff. This email should feel like it was written by a person who's already invested in their success, not auto-generated by a CRM workflow.

Customer details:

[COMPANY_NAME]

[INDUSTRY]

[PRIMARY_PRODUCT_PURCHASED]

[KEY_GOALS_FROM_SALES_NOTES]

[CHAMPION_NAME_AND_TITLE]

[CONTRACT_VALUE_AND_TERM]

[ANY_SPECIFIC_COMMITMENTS_FROM_SALES]

My name and title:

[YOUR_NAME_AND_TITLE]

Scheduling link:

[SCHEDULING_LINK]

EXAMPLE INPUT

Company: BrightPath Learning, a 200-person edtech company building corporate training platforms.

Industry: EdTech / SaaS

Product purchased: Enterprise Analytics Suite + API access

Key goals: They want to reduce time-to-insight for their clients' training ROI reports from 2 weeks to same-day. Also want to embed analytics into their own product via API.

Champion: Sarah Chen, VP of Product

Contract: \$85K ARR, 2-year term

Commitments from sales: Dedicated solutions engineer for first 60 days, priority API documentation access, quarterly executive check-ins with our VP of CS.

My name: Jordan Rivera, Senior Customer Success Manager

Scheduling link: calendly.com/jrivera-kickoff

EXAMPLE OUTPUT

Subject: Welcome to [Platform], Sarah -- let's get BrightPath to same-day insights

Hi Sarah,

I'm Jordan Rivera, your dedicated Customer Success Manager. From here on out, I'm your strategic partner for everything related to getting value from [Platform] -- not just when things break, but for planning, optimization, and making sure your investment pays off.

I've spent time reviewing your sales conversations and implementation goals, so I'm not starting from zero. I know BrightPath is focused on two big outcomes:

1. Cutting time-to-insight on training ROI reports from 2 weeks to same-day
2. Embedding analytics directly into your platform via our API

Both are achievable, and I've seen similar implementations succeed with companies in your space. I also want to make sure we deliver on everything discussed during sales -- that includes your dedicated solutions engineer for the first 60 days, priority API documentation access, and quarterly executive check-ins with our VP of CS.

Here's what the first 30 days look like:

- **Week 1:** Kickoff call (you, me, and your solutions engineer). We'll align on goals, timeline, and who needs to be involved on your side.
- **Weeks 2-3:** Technical setup and API sandbox access. Your SE will lead this, and I'll make sure nothing stalls.
- **Week 4:** First checkpoint -- we'll review initial configuration, flag any blockers, and confirm we're tracking toward same-day insights.

Before our kickoff, it would help to know:

- Who on your team will be the day-to-day technical contact for API integration?
- Are there any hard deadlines (product launch dates, client commitments) we should build the timeline around?
- Any hesitations or concerns your team has that didn't come up during sales?

Let's get the kickoff scheduled: calendly.com/jrivera-kickoff

I'd suggest 60 minutes so we have time to go deep on the API timeline without rushing. Aim for sometime this week if possible -- momentum matters in the first 30 days.

Looking forward to working with you and the BrightPath team.

Best,
Jordan Rivera
Senior Customer Success Manager

- ★ Reference something specific from the sales notes in your first email. Customers dread the "starting over" feeling when they move from sales to CS. Showing you already know their goals, contract terms, and any promises made during the deal builds immediate trust and signals that this isn't a generic handoff.

Relationship Management & Check-ins

#11 Check-in Call Follow-Up Email

Relationship Management

- After every regular check-in call with a customer. This is your highest-frequency writing task -- you might send 8-12 of these per week across your book of business. The goal is a fast, structured recap that takes you 5 minutes to write, not 30.

THE PROMPT

I'm a Customer Success Manager writing a follow-up email after a regular check-in call with a customer. Write a concise follow-up that includes:

1. **Key discussion points** -- 3-5 bullet summary of what we talked about
2. **Action items** -- Table with item, owner, and due date
3. **Health pulse** -- One sentence on overall account trajectory (positive, stable, or flagging a concern)
4. **Next meeting** -- Date and any agenda items to prep

Maximum 200 words. Use bullets and a table. This email should take the customer 60 seconds to read and serve as a searchable reference later.

Call notes:

[CALL_NOTES_OR_KEY_DISCUSSION_POINTS]

Action items from call:

[ACTION_ITEMS_WITH_OWNERS_AND_DATES]

Account health context:

[CURRENT_HEALTH_SCORE_OR_GENERAL_SENTIMENT]

Next meeting:

[DATE]

EXAMPLE INPUT

Call notes: Biweekly check-in with Priya at CloudFirst. Usage is up 15% month-over-month -- the NPS workflow is driving the increase. She flagged that two team members are still not using the automated reporting and asked for help. Also mentioned they're expanding the CS team from 12 to 18 in Q3 and want to discuss adding licenses. Renewal is in 5 months; she said budget conversations start next month.

Action items:

- CSM to schedule 1:1 training for the 2 non-adopters by March 20
- Priya to send new headcount timeline for Q3 expansion

- CSM to prepare expansion pricing options for 6 additional seats
- CSM to send renewal timeline overview at next check-in

Health: Green -- usage trending up, champion engaged, expansion signal detected.

Next meeting: April 3 at 10am ET.

EXAMPLE OUTPUT

Subject: CloudFirst check-in recap -- March 20

Hi Priya,

Quick recap from today:

****Discussion Summary****

- Usage up 15% MoM -- NPS workflow driving the increase
- 2 team members still not on automated reporting; scheduling 1:1 training for them
- Q3 team expansion from 12 → 18 CSMs -- discussing additional licenses
- Renewal in 5 months; budget conversations starting next month

****Action Items****

Action	Owner	Due
Schedule 1:1 training for 2 non-adopters	Jordan (me)	Mar 25
Send Q3 headcount timeline	Priya	Mar 28
Prepare expansion pricing (6 seats)	Jordan (me)	Apr 3
Share renewal timeline overview	Jordan (me)	Apr 3 (next call)

****Account Pulse:**** Strong trajectory -- adoption growing, expansion on the horizon, champion fully engaged.

****Next check-in:**** April 3 at 10am ET. I'll bring expansion pricing options and a renewal timeline overview.

Best,
Jordan

- ★ Build a template for this email in your text expander or note-taking app. The structure never changes (summary, actions, pulse, next steps) -- only the content does. If you're spending more than 5 minutes on any check-in follow-up, you're overwriting. Save the detailed prose for QBR summaries and escalation briefs.

QBR & Strategic Reviews

#15 QBR Executive Summary Generator

QBR

- You need to produce the executive summary for a Quarterly Business Review. This is the single highest-stakes writing task most CSMs face -- it's read by the customer's executive sponsor, your VP of CS, and sometimes the C-suite on both sides. It needs to be tight, data-driven, and strategically framed.

THE PROMPT

I'm a Customer Success Manager writing the executive summary for a Quarterly Business Review (QBR). Write a 1-page executive summary that includes:

- Partnership overview** -- One sentence: who, what product, how long, contract value
- Goals recap** -- The 2-3 success criteria from the mutual success plan, with current status (achieved / on track / at risk)
- Key metrics** -- A data table showing the most important metrics with baseline, current, and target values
- Wins this quarter** -- 3-4 specific accomplishments with quantified impact
- Challenges and mitigations** -- Honest assessment of what's not working and what we're doing about it
- Strategic recommendations** -- 2-3 forward-looking suggestions for the next quarter
- Health score** -- Current score with brief interpretation

The tone should be executive-level: concise, data-forward, no filler. Every sentence should earn its place. An executive should be able to read this in 3 minutes and understand the full state of the partnership.

Account data:

[COMPANY_NAME]
[PRODUCT_AND_CONTRACT_DETAILS]
[QUARTER_BEING_REVIEWED]
[SUCCESS_CRITERIA_AND_STATUS]
[KEY_METRICS_WITH_BASELINES_AND_CURRENT]
[TOP_WINS_THIS_QUARTER]
[CHALLENGES_OR_ISSUES]
[STRATEGIC_CONTEXT_OR_UPCOMING_CHANGES]
[HEALTH_SCORE]

EXAMPLE INPUT

Company: LogiTrack (\$175K ARR, 2-year contract, Month 14 of 24)
Product: Fleet Analytics Platform + Predictive Maintenance module
Quarter: Q1 2026

Success criteria:

- 1. Reduce unplanned vehicle downtime by 25% (baseline: 18% downtime rate). Current: 11.2% -- ACHIEVED
- 2. Fleet utilization rate to 85% (baseline: 72%). Current: 81% -- ON TRACK
- 3. Maintenance cost reduction of 15% (baseline: \$2.4M/quarter). Current: \$2.1M -- ON TRACK (12.5% reduction so far)

Key metrics: Active vehicles on platform: 340/340 (100%). Predictive alerts generated: 1,247. Alerts acted on: 89%. Average response time to alerts: 4.2 hours (target: <6 hours). User adoption: 28/30 fleet managers active.

Wins: (1) Unplanned downtime dropped from 18% to 11.2% -- exceeded the 25% reduction target. (2) Predictive maintenance caught a critical engine failure pattern across 12 vehicles, saving an estimated \$180K in emergency repairs. (3) 100% fleet onboarded ahead of schedule.

Challenges: (1) Two fleet managers still not using the platform -- both manage remote depots with limited connectivity. (2) Integration with their fuel management system stalled due to API compatibility issues on their vendor's side.

Strategic context: LogiTrack is acquiring a regional competitor in Q2, adding ~150 vehicles. Potential expansion opportunity.

Health score: 88/100 (Green)

EXAMPLE OUTPUT

```
# Quarterly Business Review -- Executive Summary
## LogiTrack + [Our Company] | Q1 2026
**Contract:** $175K ARR | 2-year term | Month 14 of 24
**Health Score:** 88/100 (Green)

---

### Goals Status

| Success Criteria | Baseline | Target | Current | Status |
|-----|-----|-----|-----|-----|
| Reduce unplanned downtime | 18% | ≤13.5% (-25%) | 11.2% | **ACHIEVED** |
| Fleet utilization rate | 72% | 85% | 81% | On Track |
| Maintenance cost reduction | $2.4M/qtr | $2.04M (-15%) | $2.1M (-12.5%) | On Track |

### Key Platform Metrics

| Metric | Value |
|-----|-----|
| Vehicles on platform | 340/340 (100%) |
| Predictive alerts generated | 1,247 |
| Alert action rate | 89% |
| Avg. alert response time | 4.2 hrs (target: <6 hrs) |
| Fleet manager adoption | 28/30 (93%) |
```

Q1 Wins

1. ****Downtime target exceeded:**** Unplanned vehicle downtime dropped from 18% to 11.2% -- surpassing the 25% reduction goal by month 14, with 10 months remaining on the contract.
2. ****\$180K in avoided emergency repairs:**** Predictive maintenance identified a critical engine failure pattern across 12 vehicles before any broke down. This single catch more than covers the annual platform cost.
3. ****Full fleet onboarded ahead of schedule:**** All 340 vehicles live on the platform as of February -- two weeks ahead of the original timeline.

Challenges & Mitigations

1. ****Two fleet managers at remote depots are not active.**** Root cause: limited internet connectivity at remote sites. Mitigation: Evaluating offline-capable mobile interface (beta available Q2). CSM will coordinate pilot.
2. ****Fuel management integration stalled.**** Blocked by API compatibility on the fuel vendor's side, not ours. Mitigation: CSM has drafted a technical requirements doc for LogiTrack to share with their fuel vendor. Fallback: manual CSV import as interim solution.

Strategic Recommendations for Q2

1. ****Prepare for acquisition scale-up.**** LogiTrack's Q2 acquisition will add ~150 vehicles. Recommend scoping expansion pricing and onboarding plan now to ensure a smooth transition. This is both a growth opportunity and a retention lever -- demonstrating platform scalability during a high-stakes integration builds executive confidence.
2. ****Target the remaining 2 fleet managers.**** 93% adoption is strong, but 100% adoption strengthens the renewal narrative. The offline beta could solve the connectivity barrier.
3. ****Build the renewal business case now.**** With downtime targets exceeded and \$180K in documented savings, the value story is compelling. Recommend assembling the renewal narrative in Q2 so it's ready when budget conversations start.

Prepared by: [CSM Name] | Next QBR: Q2 2026

- ★ The executive summary is the only page of the QBR deck that every attendee will actually read. Optimize it ruthlessly. Lead with the metric that matters most to the executive sponsor (usually cost savings or revenue impact), not the metric that makes your platform look best. If you can show that your platform delivered more value than it costs, the renewal conversation is already half won.

Risk & Escalation

#25 Re-engagement Email (Gone Dark Customer)

Risk

- A customer has stopped responding to your emails and calls. They've gone dark -- missed check-ins, no replies, possibly declining usage. You need an email that breaks through the silence without being desperate, guilt-tripping, or pretending nothing is wrong.

THE PROMPT

I'm a Customer Success Manager writing a re-engagement email to a customer who has gone dark. They haven't responded to my last [NUMBER] outreach attempts over [TIME_PERIOD]. Write an email that:

1. Acknowledges the silence without being passive-aggressive or guilt-tripping
2. Leads with something genuinely useful (not "just checking in")
3. Makes it easy to re-engage with a low-friction ask (not "let's schedule a 60-minute call")
4. Provides an out -- if they're evaluating alternatives or want to reduce engagement, give them permission to tell you
5. Is under 150 words -- long emails from vendors you've been ignoring get deleted unread

Do NOT: use "I haven't heard from you," guilt-trip about unanswered emails, or pretend nothing is wrong. The customer knows they've been ignoring you. Acknowledge it with grace.

Context:

[COMPANY_NAME]

[CHAMPION_NAME]

[HOW_LONG_SINCE_LAST_CONTACT]

[NUMBER_OF_UNANSWERED_OUTREACH_ATTEMPTS]

[KNOWN_OR_SUSPECTED_REASON_FOR_SILENCE]

[SOMETHING_GENUINELY_USEFUL_YOU_CAN_OFFER]

EXAMPLE INPUT

Company: Vantage HR

Champion: Dana Park, Director of Talent Acquisition

Last contact: 10 weeks ago

Unanswered attempts: 3 emails, 1 voicemail

Suspected reason: Frustration with mobile app issues (field team uninstalled).

Lost confidence in the platform.

Something useful: v4.2 shipped with 80% mobile crash reduction. Also have benchmark data showing their recruiting team's screening volume is 30% above industry average.

EXAMPLE OUTPUT

Subject: Two things for Vantage -- mobile fix + a benchmark you'll want to see

Hi Dana,

I know things have been quiet between us, and I'd rather be direct than pretend otherwise.

Two things worth 60 seconds of your time:

1. **Mobile app fix is live.** The crash issues your field team dealt with have been addressed -- crash rate is down 80% in v4.2. If your field recruiters are willing to give it another shot, I'll personally make sure the experience is solid this time.

2. **Your screening numbers are impressive.** I ran a benchmark comparison, and Vantage's screening volume is 30% above the industry average for companies your size. Happy to send the full report -- useful for internal reporting or headcount justification.

If your priorities have shifted or you'd prefer a different engagement cadence, that's completely fine -- just let me know and I'll adjust.

Worth a 15-minute call this week?

Best,
[CSM Name]

- ★ The re-engagement email is about reducing the cost of responding. When a customer has been ignoring you for weeks, the psychological barrier to replying gets higher with every unanswered email. Your job is to lower that barrier. Offer something useful (not a meeting request), keep it short (not a wall of text), and give them permission to change the relationship terms. Sometimes the best way to save an account is to say "if you want less from me, that's okay too."

Compliance & Data Safety

#30 Customer Data Anonymization Guide

Compliance

- Before using AI tools (ChatGPT, Claude, Copilot, etc.) with customer data. CSMs handle sensitive information daily -- customer names, ARR figures, health scores, stakeholder details, and internal business data. This prompt generates a step-by-step guide for anonymizing customer data before inputting it into any AI tool, protecting both the customer and your company.

THE PROMPT

I'm a Customer Success Manager who needs to use AI tools for drafting customer communications, analyzing account data, or generating reports. Before I input any customer information into an AI tool, I need to anonymize the data properly.

Given the following raw customer data, generate:

1. **Anonymized version** -- Replace all identifying information with realistic but fictional substitutes. Map every replacement so I can de-anonymize the output later.
2. **Replacement mapping table** -- A clear table showing original → anonymized values for every substitution
3. **Risk flag** -- Call out any data points that are particularly sensitive (revenue figures, contractual terms, health scores, personal contact info) and recommend whether to include them at all
4. **Sanitized prompt** -- Rewrite my intended AI prompt using the anonymized data, ready to paste into any AI tool
5. **De-anonymization checklist** -- Reminders for what to replace back in the AI output before sending to anyone

The anonymization should be realistic enough that the AI generates useful output -- don't replace company names with "Company A" or person names with "Person 1." Use plausible fictional names and figures.

Raw data I want to use with an AI tool:

[PASTE_YOUR_RAW_CUSTOMER_DATA]

The prompt I want to run:

[PASTE_YOUR_INTENDED_AI_PROMPT]

EXAMPLE INPUT

Raw data:

Company: Meridian Financial Group. Champion: Maria Torres, Director of Revenue Ops. Exec sponsor: CFO James Park. ARR: \$175K. Renewal: October 2026. Health: 88. They're consolidating 4 reporting tools into our platform. Monthly close

time dropped from 5 days to 2.3 days. 8 revenue ops analysts, all active. Considering APAC expansion (40 users). CFO wants TCO comparison.

Prompt I want to run:

"Write a QBR executive summary for this customer highlighting their reporting consolidation progress and the APAC expansion opportunity."

EXAMPLE OUTPUT

Anonymized Data

****Company:**** Pinnacle Advisory Partners
****Champion:**** Rachel Kim, Director of Financial Operations
****Exec Sponsor:**** CFO David Chen
****ARR:**** \$160K
****Renewal:**** November 2026
****Health Score:**** [REMOVED -- see Risk Flag]
****Project:**** Consolidating 4 reporting tools into single platform
****Result:**** Monthly close time reduced from 5 days to 2.5 days
****Team:**** 8 financial operations analysts, all active
****Expansion:**** Evaluating APAC team expansion (35 users)
****CFO Request:**** Total cost of ownership comparison

Replacement Mapping

Original	Anonymized
Meridian Financial Group	Pinnacle Advisory Partners
Maria Torres	Rachel Kim
Director of Revenue Ops	Director of Financial Operations
James Park	David Chen
\$175K ARR	\$160K
October 2026	November 2026
88 health score	[REMOVED]
8 analysts	8 analysts (kept -- not identifying)
40 APAC users	35 users
5 days → 2.3 days	5 days → 2.5 days

Risk Flags

Data Point	Risk Level	Recommendation
Health score (88)	**High**	Remove. Internal metric that reveals your assessment of the customer relationship. If leaked, could damage trust.
Exact ARR (\$175K)	**Medium**	Modify slightly (\$160K). Exact contract values are often under NDA.
CFO name and title	**Medium**	Anonymize. Personal information of a C-level executive.
Renewal date	**Low**	Shift by 1 month. Not highly sensitive but could identify the account in context.
Close time metrics	**Low**	Keep approximately accurate -- the AI needs realistic numbers to generate useful output.

Sanitized Prompt (Ready to Paste)

Write a QBR executive summary for a customer called Pinnacle Advisory Partners. They are a financial services company with a \$160K annual contract renewing in November 2026. Their

Director of Financial Operations, Rachel Kim, is the champion; CFO David Chen is the executive sponsor.

Key highlights: They consolidated 4 legacy reporting tools into our platform. Monthly close time dropped from 5 days to 2.5 days. All 8 financial operations analysts are actively using the platform. They're evaluating expanding to their APAC team (35 additional users), and the CFO wants a total cost of ownership comparison vs. their previous tool stack.

Write the executive summary highlighting consolidation progress, the close time improvement, and frame the APAC expansion as a strategic discussion topic for the QBR.

De-Anonymization Checklist

Before sending the AI output to anyone:

- [] Replace "Pinnacle Advisory Partners" → Meridian Financial Group
- [] Replace "Rachel Kim" → Maria Torres
- [] Replace "Director of Financial Operations" → Director of Revenue Ops
- [] Replace "David Chen" → James Park
- [] Replace "\$160K" → \$175K
- [] Replace "November 2026" → October 2026
- [] Replace "2.5 days" → 2.3 days
- [] Replace "35 users" → 40 users
- [] Re-add health score (88) if needed for internal version
- [] Review entire output for any AI-generated details that accidentally match real data

- ★ Build a personal anonymization template for your top 10 accounts so you can swap data quickly. The five minutes you spend anonymizing before using an AI tool protects you from the career-ending scenario of customer data showing up in an AI training dataset or being visible to another user on a shared platform. This isn't paranoia -- it's professional discipline. Treat every AI tool as a public channel until your company's security team tells you otherwise.

Want the Full Toolkit?

The full CSM's AI Toolkit covers your entire customer success lifecycle — from onboarding to renewal close.

Standard — \$39

- 31 copy-paste AI prompts (including 2 data safety prompts)
- Real examples with every prompt
- Pro tips grounded in CS best practices
- Workflow map, prompt chains, and quick-reference cheat sheet
- Customization guide for adapting prompts to your product and customers

Get the toolkit at: aitoolkitshop.com/customer-success-managers/

Built by AI Toolkit Shop — professional AI toolkits for specific industries. aitoolkitshop.com