CAREER SKILLS FIELD WORKBOOK

# The Client Success Manager Field Workbook

A hands-on, practice-first playbook to do the real job from day one — onboarding, health scoring, renewals, QBRs, expansion, and churn prevention.

5% Theory · 95% Practice | Copy-Paste Scripts | Fill-In Worksheets | Real SaaS Workflows

by KOMPRI • Career Skills Field Workbook Series
Self-study ready · Classroom & training ready • International workplace terminology
Edition 1.0 • A complete operational guide for new and aspiring CSMs worldwide

# Copyright & Disclaimer

## Copyright



**Author:** KOMPRI | **Publication:** Career Skills Field Workbook Series | **Format:** Digital PDF (ebook)

## Disclaimer

This workbook is an educational and professional-development resource. The frameworks, scripts, runbooks, and worksheets reflect widely used industry practices in the field of Customer/Client Success.

- The content is provided for general learning purposes and does not constitute legal, financial, or employment advice.
- Outcomes such as job placement, salary, retention rates, or revenue results are **not guaranteed** and depend on the reader's own effort, context, and the organization they work in.
- Company names, product types, and scenarios used in examples are illustrative only and do not represent any specific real organization.
- Terminology and metrics may vary slightly between companies and regions; readers should adapt the templates to their own workplace.

> **In short:** This book gives you the proven system and the tools to practice it. Real-world results come from applying it consistently with real customers.

For questions, feedback, or bulk/classroom licensing, contact the author through the Gumroad product page where this workbook was purchased.

# About This Workbook

> This workbook was built on one simple belief: **people learn a job by doing the job — not by reading about it.** That is why 95% of these pages are practice, scripts, and worksheets, and only 5% is theory.

## Why this workbook exists

Most career resources explain *what* a role is but leave you stuck on *how* to actually perform it on day one. The Client Success Manager (CSM) role is one of the fastest-growing jobs in the global technology industry, yet new and aspiring CSMs often start with no playbook at all. This workbook closes that gap by handing you the exact runbooks, scripts, and templates used in real Customer Success teams — ready to copy, fill in, and apply.

## Who this workbook is for

| Reader | What you get |
|---|---|
| **Aspiring CSM / career switcher** | A complete, job-ready system and a capstone portfolio piece for interviews. |
| **New CSM on the job** | A desk reference of runbooks and scripts to use from your first week. |
| **Trainer / lecturer / teacher** | Ready-made class material — each module is one session, each worksheet an exercise. |

## How this workbook was designed

- Built around the real **customer lifecycle** every CSM works through.
- Uses **standard international workplace terminology** (GRR, NRR, QBR, TTFV, NPS) so your skills transfer to any company worldwide.
- Every module ends with a **fill-in worksheet** so knowledge becomes a skill you can demonstrate.

## About the author

**KOMPRI** is an educator and developer of practical learning tools, focused on building hands-on, self-contained resources that help learners and professionals master real-world skills. This workbook is part of the *Career Skills Field Workbook Series* — a collection of practice-first guides designed for self-study, on-the-job use, and classroom teaching across the globe.

> **How to get the most from this book:** Don't just read it. Open a worksheet, pick a real or imagined customer, and fill it in. By the final page you'll have practiced the entire job end-to-end.

# How to Use This Workbook

This is not a textbook. It is a **doing manual**. Every section gives you the exact steps, the exact words to say, and a worksheet to fill in. Read 5 minutes, then practice for 25.

**Three ways to use it:**

- **Self-taught learner:** Work one module per day. Complete the worksheet using a real or imagined customer. By the end you will have a personal playbook you can show in interviews.
- **On the job:** Keep it open beside you. Copy the scripts, run the runbooks, fill the trackers with your actual accounts.
- **Trainer / lecturer / teacher:** Each module = one class session. Use the worksheets as in-class exercises and the checklists as assessments.

## Legend

**Lead idea** — the one thing that matters.

**Watch out** — a common mistake.

**Tip** — a pro shortcut.

**SCRIPT**
Words you can copy and send.

# Contents

# 01 · What a Client Success Manager Actually Does

THE 5% THEORY — read once, then never look back

A **Client Success Manager (CSM)** makes sure customers reach the outcome they bought your product for — so they stay, spend more, and recommend you. Sales wins the customer; the CSM keeps and grows them.

> **Your one job in a sentence:** Drive customer-desired outcomes and remove every obstacle between the customer and value — proactively, before they ask.

## The four outcomes you are paid to protect

| Outcome | What it means | How it's measured |
|---|---|---|
| **Adoption** | Customer actually uses the product the right way | Active users, feature usage, login frequency |
| **Retention** | Customer renews their contract | Gross/Net Retention, churn rate |
| **Expansion** | Customer buys more (seats, tiers, add-ons) | Upsell/cross-sell revenue, NRR |
| **Advocacy** | Customer refers others & gives references | NPS, referrals, case studies |

## CSM vs. the roles around you

| Role | Their focus | Where you hand off |
|---|---|---|
| Sales / Account Executive | Win new contracts | They close → you onboard |
| Support | Fix tickets reactively | You manage relationship; they fix issues |
| Onboarding / Implementation | Technical setup | They configure → you drive adoption |
| **You (CSM)** | **Outcomes, relationship, growth** | You own the account end-to-end |

> **Mindset shift:** A CSM is **proactive**, not reactive. If a customer has to email you with a problem, you were often too late. Your calendar should be full of *scheduled* check-ins, not just fire-fighting.

## Quick self-check

Write your answer in one line — this is the only theory exercise in the book.

In your own words, what is the difference between Customer *Support* and Customer *Success*?

# 02 · The Customer Lifecycle & Your Role

Every customer moves through the same journey. Your job changes at each stage. Memorize this map — it organizes the entire job.

| Stage | Customer is thinking... | Your action | Success signal |
|---|---|---|---|
| **1. Handoff** from Sales | "Did I make the right choice?" | Read the deal notes, learn their goals, schedule kickoff | Kickoff booked in <5 days |
| **2. Onboarding** | "How do I get started?" | Run setup plan, train users, reach first value fast | "First value" milestone hit |
| **3. Adoption** | "Is this becoming part of our work?" | Drive usage, share best practices, monitor health | Daily/weekly active usage rising |
| **4. Value Realization** | "Are we getting ROI?" | Run QBRs, prove results vs. their goals | Customer can state the ROI |
| **5. Renewal** | "Should we continue?" | Confirm value early, secure renewal | Renewed on time |
| **6. Expansion** | "What else can this do?" | Identify upsell/cross-sell, advocacy | NRR > 100%, referral given |

### Key term: "Time to First Value (TTFV)"

> TTFV is how long it takes a new customer to experience their first real win with your product. **Shorter TTFV = higher retention.** Cutting TTFV is one of the highest-impact things a CSM does.

### Worksheet 2.1 — Map one product to the lifecycle

Pick any product you know (yours, or a tool like a CRM, design app, or LMS). Define what each milestone looks like.

| Milestone | Your definition for this product |
|---|---|
| What is "First Value"? | |
| What does "fully adopted" look like? | |
| What ROI would the customer claim? | |
| One obvious expansion opportunity | |

> **Practice now:** If you can fill this table for any product, you can do the core thinking of a CSM. Do it for 2–3 different products to build the muscle.

# 03 · Onboarding Playbook — First 90 Days

The first 90 days decide whether a customer stays for years or churns. Follow this runbook exactly.

## The 90-Day Runbook

| When | Step | What you do |
|---|---|---|
| **Day 0–2** | 1 Internal handoff | Get goals, success criteria, key contacts, and risks from Sales. Never start blind. |
| **Day 3–5** | 2 Welcome + book kickoff | Send welcome email (see §09), confirm decision-makers, schedule kickoff call. |
| **Week 1** | 3 Kickoff call | Confirm goals, agree the success plan, set the "First Value" milestone and date. |
| **Week 2–3** | 4 Setup & configure | Drive technical setup, integrations, data import; train the core users. |
| **Week 3–4** | 5 Reach First Value | Help them complete their first real task. Celebrate it out loud. |
| **Week 5–8** | 6 Drive adoption | Expand to more users, share best practices, monitor usage weekly. |
| **Day 75–90** | 7 30-day review | Review progress vs. goals, fix gaps, set the next quarter's plan. |

## The Kickoff Call — exact agenda (45 min)

1. **(5 min) Introductions & agenda** — who's who, what we'll cover.
2. **(15 min) Confirm goals** — "What does success look like in 90 days? In a year?"
3. **(10 min) Walk the success plan** — milestones, owners, dates.
4. **(10 min) Logistics** — meeting cadence, communication channel, support process.
5. **(5 min) Next steps** — recap commitments, send written summary same day.

**KICKOFF OPENING LINE**

"Thanks everyone for joining. My job is simple — to make sure you get the results you signed up for. So before we touch the product, I want to hear in your words what a great outcome looks like 90 days from now."

## Worksheet 3.1 — Build a Mutual Success Plan

A Mutual Success Plan (also called a Success/Onboarding Plan) is a shared document of goals, milestones, owners, and dates. Fill it for one real or sample customer.

| Field | Entry |
|---|---|
| Customer name | |
| Primary goal (their words) | |
| How success will be measured | |
| "First Value" milestone & target date | |
| Key contacts (Champion, Decision-maker, Users) | |
| Known risks | |

| Milestone | Owner | Due | Status |
|---|---|---|---|
| Kickoff completed | | | |
| Setup & integration done | | | |
| Core users trained | | | |
| First Value achieved | | | |
| 30-day review held | | | |

**Watch out:** Never let onboarding drift without a date. "Sometime soon" is how customers go silent and churn. Every milestone gets an owner and a deadline.

**Trainer exercise:** Have learners role-play a kickoff call in pairs (CSM + customer) using this plan, then swap roles.

# 04 · Building a Customer Health Score

A **Health Score** is a single number (or color) that tells you instantly which accounts are thriving and which are at risk — so you act *before* they churn.

> **Rule:** Green = healthy, leave alone. Yellow = watch, schedule a touch. Red = at risk, intervene now. Spend your week from Red → Yellow → Green.

## A simple, real scoring model

Assign points to each signal, then total them. Adjust weights to fit your product.

| Signal | What to look at | Weight |
|---|---|---|
| Product usage | Logins / active users vs. expected | 30% |
| Adoption depth | Key features being used? | 20% |
| Relationship | Champion engaged? Replies to you? | 20% |
| Support & sentiment | Ticket volume, NPS/CSAT, complaints | 15% |
| Commercial | Invoices paid, renewal date, growth | 15% |

## Worksheet 4.1 — Score an account

| Signal | Score 1–5 | Why (one line) |
|---|---|---|
| Product usage | | |
| Adoption depth | | |
| Relationship | | |
| Support & sentiment | | |
| Commercial | | |
| **Overall color (R/Y/G)** | | |

### Now write the action

Based on the color, what is the single next action and by when?

---

> **Red-flag triggers to memorize:** usage dropping for 2+ weeks, your Champion leaves the company, no reply to 2 messages, a renewal <90 days away with low usage. Any one of these = act immediately.

# 05 · The Quarterly Business Review (QBR)

A **QBR** (also called an Executive Business Review) is a scheduled meeting where you prove value, align on goals, and plan the next quarter with the customer's decision-makers.

## QBR Agenda Template (45–60 min)

| Section | Content | Time |
| --- | --- | --- |
| 1. Recap & goals | The goals we set last quarter | 5 min |
| 2. Results / ROI | Usage, outcomes, wins vs. those goals | 15 min |
| 3. Insights | What's working, what to improve | 10 min |
| 4. Roadmap & opportunities | New features, expansion ideas | 10 min |
| 5. Next-quarter plan | New goals, owners, dates | 10 min |

**Watch out:** A QBR is **not** a product demo. Lead with *their* results and ROI, not your features. If you can't show value, fix that before booking the meeting.

## Worksheet 5.1 — Prepare a QBR

| Prep item | Your notes |
| --- | --- |
| Top 3 results to highlight | |
| One number that proves ROI | |
| One risk or gap to address | |
| One expansion idea to plant | |
| The ask / decision needed | |

**QBR OPENING LINE**

"Last quarter we agreed success meant [GOAL]. Today I'll show you exactly where you stand against that, what we learned, and a plan to push further next quarter."

**Cadence:** Run QBRs quarterly for high-value accounts, twice a year for mid, and a lightweight email review for small accounts.

# 06 · Renewals & Churn Prevention

Renewal is won months before the renewal date — through value, not negotiation. Start early.

## The Renewal Runbook

| Timeline | Action |
|---|---|
| **120 days out** | Review health score, confirm value is being realized, flag any risk. |
| **90 days out** | Run a value-focused QBR; surface the renewal informally. |
| **60 days out** | Send formal renewal proposal; confirm budget & decision process. |
| **30 days out** | Handle objections, finalize terms, get verbal commit. |
| **Renewal date** | Sign, confirm, thank, and reset goals for the new term. |

## The 5 reasons customers churn — and your counter-move

| Churn reason | Your counter-move |
|---|---|
| Never reached value | Re-onboard; set a fast new First-Value milestone |
| Champion left | Find & build a new champion immediately |
| Low adoption | Targeted training + usage plan |
| Budget cut | Re-prove ROI in money terms; offer right-sized plan |
| Competitor | Reinforce differentiators & switching cost |

## Worksheet 6.1 — Churn-save plan

| Question | Answer |
|---|---|
| Real reason for risk | |
| Who is the decision-maker? | |
| What value can you prove this week? | |
| Your specific save offer | |
| Next action + date | |

**RENEWAL VALUE LINE**

"Before we talk terms, I want to recap what you've gained this year: [RESULT 1], [RESULT 2]. Renewing keeps that momentum and unlocks [NEXT GOAL]."

# 07 · Expansion, Upsell & Cross-Sell

Growing existing customers is faster and cheaper than finding new ones. This is where you drive **Net Revenue Retention (NRR)** above 100%.

> **Definitions: Upsell** = more of what they have (seats, higher tier). **Cross-sell** = a different product/add-on. **Expansion** = either, once the customer is already succeeding.

> **Watch out:** Never pitch expansion to an unhealthy account. Earn the right first — expansion follows value, never the other way around.

## How to spot an expansion signal

- They've hit a usage limit (seats, storage, volume).
- A new team or department starts using the product.
- They ask "can it also do X?" — X is your cross-sell.
- They report a strong result and want more of it.

## The expansion conversation (4 steps)

1. **Anchor on value** — restate the result they're already getting.
2. **Surface the need** — connect their stated goal to a gap.
3. **Propose the fit** — recommend the specific upgrade/add-on.
4. **Make it easy** — clear price, clear next step, low friction.

## Worksheet 7.1 — Expansion opportunity map

| Item | Your notes |
|---|---|
| Account & current value proven | |
| Expansion signal you observed | |
| Upsell or cross-sell? Which one? | |
| The specific recommendation | |
| Who must approve it? | |

**SOFT EXPANSION LINE**

"You're getting great results with [CURRENT USE]. A few customers in your position add [ADD-ON] to also [BENEFIT]. Want me to show you what that would look like for your team?"

# 08 · Escalations & Difficult Conversations

How you handle problems builds more loyalty than when everything is smooth. Stay calm, own it, follow a process.

## The E.A.R.S. framework for any angry customer

| Step | What to do | What to say (pattern) |
|---|---|---|
| **E — Empathize** | Acknowledge the impact first | "I understand why this is frustrating, and I'm sorry it's affecting [IMPACT]." |
| **A — Ask** | Clarify the real problem | "So I fully understand — can you walk me through what happened?" |
| **R — Resolve** | State action + owner + time | "Here's what I'll do, by when: [ACTION] by [TIME]." |
| **S — Summarize** | Confirm in writing, follow up | "To recap our plan: [STEPS]. I'll update you on [DATE]." |

**Never:** get defensive, blame other teams in front of the customer, over-promise, or go silent. Silence during a crisis is the fastest path to churn.

## Escalation decision: when to pull in others

- **Technical issue you can't solve** → loop in Support/Engineering with full context.
- **Commercial dispute** → involve your manager + Sales.
- **Executive anger / churn threat** → escalate internally *same day* with a written summary.

## Worksheet 8.1 — Handle a real escalation

| E.A.R.S. step | Your wording for a current/sample issue |
|---|---|
| Empathize | |
| Ask | |
| Resolve (action + time) | |
| Summarize | |

**Pro habit:** After any escalation, send a written recap within the hour. It calms the customer and protects you with a clear record.

# 09 · Email & Call Script Library

Copy, paste, and replace the bracketed parts. These cover 90% of daily CSM communication.

### 1 · WELCOME EMAIL (AFTER HANDOFF)

Subject: Welcome to [PRODUCT] — let's get you to results fast

Hi [NAME],
I'm [YOUR NAME], your Client Success Manager. My job is to make sure you reach [THEIR GOAL]. To kick things off, I'd love 30 minutes this week to align on your goals and map out your first win. Here's my calendar: [LINK]. Looking forward to working together.

### 2 · KICKOFF FOLLOW-UP / RECAP

Subject: Recap & next steps from our kickoff

Hi [NAME], great talking today. To recap what we agreed:
• Goal: [GOAL]
• First Value milestone: [MILESTONE] by [DATE]
• Owners: [WHO does WHAT]
I'll handle [YOUR ACTIONS]. Could you confirm [THEIR ACTION] by [DATE]? Thanks!

### 3 · CHECK-IN / NUDGE (LOW USAGE)

Subject: Quick idea to get more from [PRODUCT]

Hi [NAME], I noticed [SPECIFIC, e.g. "the team hasn't used [FEATURE] yet"]. Customers who use it typically see [BENEFIT]. Want a quick 15-min walkthrough? Happy to set it up.

### 4 · RE-ENGAGE A SILENT CUSTOMER

Subject: Still here for you, [NAME]

Hi [NAME], I haven't heard back and want to make sure you're getting value. Are we still on track for [GOAL]? Even a one-line reply helps me support you better. If timing is bad, just tell me when to circle back.

## Script Library (continued)

**5 · QBR INVITATION**

Subject: Your quarterly review — let's measure the wins

Hi [NAME], it's time for our quarterly review. I'll show your results against the goals we set, share what's working, and propose a plan for next quarter. Does [DATE/TIME] work for you and [DECISION-MAKER]?

**6 · RENEWAL OPENER (90 DAYS OUT)**

Subject: Looking ahead to your renewal

Hi [NAME], your renewal comes up on [DATE]. Before then I'd like to recap the value you've seen — [RESULT 1], [RESULT 2] — and align on goals for the next term. Can we find 30 minutes in the next two weeks?

**7 · EXPANSION PROPOSAL**

Subject: An idea to extend your results

Hi [NAME], you're seeing strong results with [CURRENT USE]. Based on [SIGNAL], adding [UPGRADE/ADD-ON] could help you [BENEFIT]. I've outlined what it would look like and the cost here: [LINK]. Want to discuss?

**8 · ESCALATION ACKNOWLEDGEMENT**

Subject: I'm on it — [ISSUE]

Hi [NAME], thank you for flagging this, and I'm sorry for the disruption to [IMPACT]. I've raised it with [TEAM] as a priority. Here's the plan: [ACTION] by [TIME]. I'll update you by [DATE] no matter what.

**9 · ASKING FOR A REFERRAL / REVIEW**

Subject: A quick favor?

Hi [NAME], so glad [PRODUCT] is delivering [RESULT]. If you know anyone who'd benefit, an intro would mean a lot — and a short review here helps others like you: [LINK]. No pressure at all, and thank you for being a great partner.

**Worksheet 9.1:** Rewrite scripts 1 and 6 in your own voice for a product you know. Personalized scripts always outperform generic ones.

# 10 · Metrics, KPIs & Weekly Operating Rhythm

## The KPIs every CSM must know

| Metric | Plain meaning | Good target |
|---|---|---|
| **Gross Retention (GRR)** | % revenue kept, excluding upsell | > 90% |
| **Net Revenue Retention (NRR)** | Revenue kept + expansion | > 100% (110%+ great) |
| **Churn rate** | % customers/revenue lost | As low as possible |
| **Adoption rate** | % of users actively using | Rising over time |
| **NPS / CSAT** | Customer satisfaction/loyalty | NPS > 30 / CSAT > 90% |
| **Time to First Value** | Speed to first win | As short as possible |

**Quick formula — NRR:** (Starting revenue + expansion − downgrades − churn) ÷ Starting revenue × 100. Above 100% means your existing customers grow even if you add no new ones.

## Your Weekly Operating Rhythm

| Day | Focus |
|---|---|
| **Monday** | Review all health scores. List every Red & Yellow account. Plan the week around them. |
| **Tue–Thu** | Customer calls: onboardings, check-ins, QBRs, escalations. Proactive outreach. |
| **Friday** | Update notes & CRM, send recaps, prep next week, log renewals/expansions in pipeline. |

## Worksheet 10.1 — Your account dashboard

| Account | Health | Renewal date | Next action | Due |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

**Watch out:** An empty CRM is a fired CSM. Log every interaction the same day — your manager, your teammates, and future-you all depend on those notes.

# 11 · Capstone — Build Your Own Account Plan

> This is your final project. Complete it for one real or realistic customer. When finished, you'll have a portfolio piece to show in interviews and a working template for the job.

## Part A — The account

| Field | Entry |
|---|---|
| Customer & industry | |
| Product they bought | |
| Their main goal | |
| Contract value & renewal date | |
| Champion & decision-maker | |

## Part B — The plan

| Element | Your entry |
|---|---|
| First Value milestone & date | |
| Current health score & color | |
| Top risk + your mitigation | |
| One expansion opportunity | |
| QBR date & key message | |
| Renewal strategy in one line | |

## Part C — The 90-day action list

1. Week 1–2:
2. Week 3–6:
3. Week 7–12:

> **Trainer note:** Have learners present their capstone in 5 minutes as if briefing a manager. This is the single best assessment of CSM readiness.

# Practice Notes & Account Journal

Use these pages to log real conversations, wins, risks, and follow-ups. A CSM who writes things down is a CSM who keeps customers.

## This week's priority accounts

| Account | Why it's a priority | Next action |
|---|---|---|
| | | |
| | | |
| | | |

## Conversation log

## Wins to celebrate (use these in QBRs & renewals)

## Risks to watch

> **Habit:** Spend 10 minutes every Friday updating this journal and your CRM. Future-you will thank you at renewal time.

# 12 · Readiness Checklist & Glossary

Tick every box. When all are checked, you can confidently do the core CSM job.

- ☐ I can explain the difference between Support and Success in one sentence.
- ☐ I can map any product to the 6-stage customer lifecycle.
- ☐ I can run a kickoff call and write a Mutual Success Plan.
- ☐ I can build and act on a customer health score.
- ☐ I can prepare and lead a value-focused QBR.
- ☐ I can run a renewal from 120 days out and build a churn-save plan.
- ☐ I can spot an expansion signal and pitch it after proving value.
- ☐ I can de-escalate an angry customer using E.A.R.S.
- ☐ I can write all 9 core emails in my own voice.
- ☐ I know my KPIs (GRR, NRR, churn, adoption, NPS, TTFV) and what good looks like.
- ☐ I run a weekly operating rhythm and keep my CRM current.
- ☐ I completed the capstone account plan.

## Glossary of standard CSM terms

| Term | Meaning |
|---|---|
| **CSM** | Client/Customer Success Manager |
| **Onboarding** | Getting a new customer set up and to first value |
| **TTFV** | Time to First Value — speed to first win |
| **Health Score** | Single indicator of account risk/strength |
| **QBR / EBR** | Quarterly / Executive Business Review |
| **Champion** | Your internal advocate at the customer |
| **GRR** | Gross Retention Rate |
| **NRR** | Net Revenue Retention (incl. expansion) |
| **Churn** | A customer leaving / lost revenue |
| **Upsell / Cross-sell** | Selling more of / a different product |
| **NPS / CSAT** | Net Promoter Score / Customer Satisfaction |
| **Adoption** | How fully the customer uses the product |

> **You're ready.** Keep this workbook beside you, fill the worksheets with real accounts, and revisit the runbooks before every kickoff, QBR, and renewal. The job is a repeatable system — and now you own it.

The Client Success Manager Field Workbook · Edition 1.0 · For self-study, on-the-job use, and classroom training.

# License of Use

By purchasing and downloading this workbook, you (the buyer) are granted the following license. Please read it — it protects both your rights as a buyer and the author's rights as the creator.

## You ARE allowed to:

- ☐ Use this workbook for your own personal learning and professional development.
- ☐ Print one copy for your personal use.
- ☐ Fill in the worksheets and use the scripts and templates in your own job and with your own customers.
- ☐ Use it as teaching material in your own classroom, training session, or workshop, with proper credit to the author **KOMPRI**.

## You are NOT allowed to:

- ☐ Resell, redistribute, or give away the file (in whole or in part) to others.
- ☐ Upload it to file-sharing sites, public drives, or any platform for free or paid download.
- ☐ Claim authorship of the content or remove the author's name and copyright.
- ☐ Repackage the content into another product for sale without written permission.

## Classroom & team licensing

If you are a lecturer, trainer, or organization that wants to distribute this workbook to many students, employees, or trainees, please obtain a **multi-seat / institutional license**. This keeps the resource sustainable and allows continued updates. Contact the author through the Gumroad product page to arrange a fair group rate.

**A note from the author:** Independent educational resources like this survive on the honesty of their buyers. Thank you for respecting the work that went into it — and for putting it into practice. Your success is the whole point of this book.

**The Client Success Manager Field Workbook**



Career Skills Field Workbook Series