

How to Get the Most Out of Your CSM

Customer Toolkit



flextal[™]

THE #1 FLEXIBLE TALENT MATCHING PLATFORM

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Welcome and thank you for choosing FlexTal. We may be slightly biased when it comes to Talent Matching, but we think you've made an excellent choice.

Our team is here to ensure you get the best Talent, focusing on not just finishing your project or solving your problem, but on helping you move the needle – **helping your organization succeed**. If things have gone as planned, by now, our Sales Team should have already introduced you to your Customer Success Manager (CSM), and your CSM has connected with you. Right away, they get started working with you to understand your current needs and find you an excellent Talent Match.

But **your CSM is so much more** than just your Talent Matching guru. They'll be your advocate throughout your FlexTal journey.

For our Customer Success Team, the focus is precisely what the name says: **your success**. To that end, your CSM will be a resource for you to lean into and talk about this job or any other needs, projects, or open roles you need to fill. Think of your CSM as your ally, advocate, or buddy for all projects, problems, and roles.

What is a CSM?

Many people ask me for a definition of what a CSM does. A quick stop at Google to research the term "Customer Success Manager" garners pages of information about this role, including, **"They straddle the gap between service and sales, between company interest and customer interest, and between product expertise and customer insight."** Essentially, they want to learn about your organization and do their best to help you and your company succeed. At some level, each search result and online definition is correct, but for us, there's more to it.

Our CSMs are not just professionals available to assist you; they are passionate experts who desire to help you find success. When you succeed, they succeed. And if they need help helping you, they'll seek it out – from our other CSMs or the experts in our Talent Network.

Each CSM on our team brings their hands-on knowledge, experience, and expertise to their customers, and they all work together. So if your CSM has strengths in Email Marketing, for example, but you've got a Website conundrum or find yourself in an App Development pickle – your CSM likely has a peer that can hop on a call with you, and the three of you can talk it over and build a plan to move the project forward. While your main relationship will be with your CSM, your "CSM buddy" also gives you access to other CSMs, our Core Team, and our entire Talent Network.



IF YOU NEED HELP GETTING YOURSELF OUT OF AN APP DEVELOPMENT PICKLE —

YOUR CSM – OR THEIR PEER – CAN HELP YOU BUILD A PLAN TO MOVE YOUR PROJECT FORWARD.

An Entire Network at Your Service.

When you peck at your keyboard to draft an e-mail or pick up your phone to call about your project, problem, or contracted flexible talent, your CSM will utilize all their skills and expertise, as well as engage their peers and our Talent Network, to keep your project headed toward success.

How to Get the Most Out of Your CSM



Helping You Grow Your Business.

As you're fully aware, access to professional assistance is essential to a growing business, but unfettered access to a network of experts passionate about your success... *well, that's FlexTal.*

Of course, as I've noted, your Customer Success Manager is your primary contact, but you're not simply getting access to one specialist; you're getting professional, expert, friendly dedication from your CSM and our whole team.

We're genuinely glad you chose FlexTal, and we look forward to succeeding with you,

Chris Koens
Director of Customer Success

What can your CSM do for you?

CSMs Match Talent To Your Needs.

Your CSM uses information about your business and this project to find the best Talent Match for you.

- ☐ Provide an overview and background to the CSM
- ☐ Inform the CSM of any priority skills or attributes
- ☐ Contextualize the project or problem

CSMs Help Coach Talent or RE-Match.

If anything isn't going as planned with your Talent Match, your CSM can work with you to try to rectify the situation, assist the Talent, or can perform a Talent Re-Match.

- ☐ Notify your CSM whenever you have concerns
- ☐ All feedback – good or bad – is appreciated
- ☐ Earlier is better, your CSM can coach or Re-Match

CSMs Can Engage a Peer Expert to Assist.

If your CSM needs help helping you, they have access to other experts from different verticals and with differing skill-sets that they can have assist.

- ☐ Discuss new projects or ideas with your CSM
- ☐ Highlight, to CSM, new roles you're considering
- ☐ Other CSMs are available for additional consults

“YOUR CUSTOMER SUCCESS MANAGER WANTS TO LEARN ABOUT YOUR ORGANIZATION AND DO THEIR BEST TO HELP YOU AND YOUR COMPANY SUCCEED.”