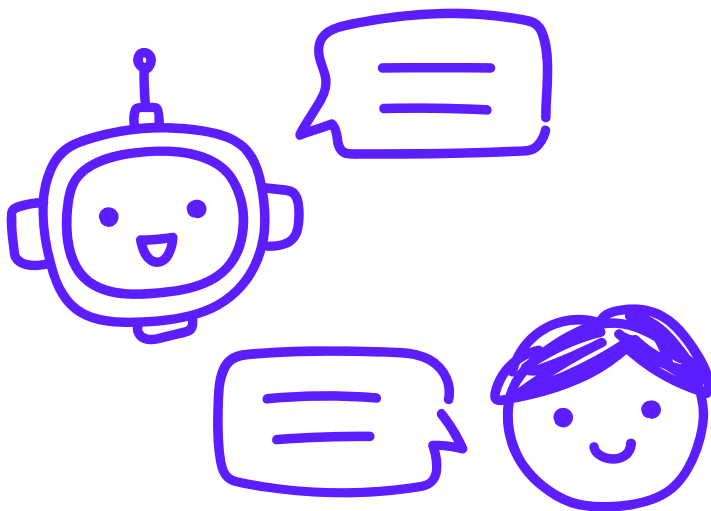

A COMPLETE GUIDE FOR CUSTOMER SUCCESS MANAGERS

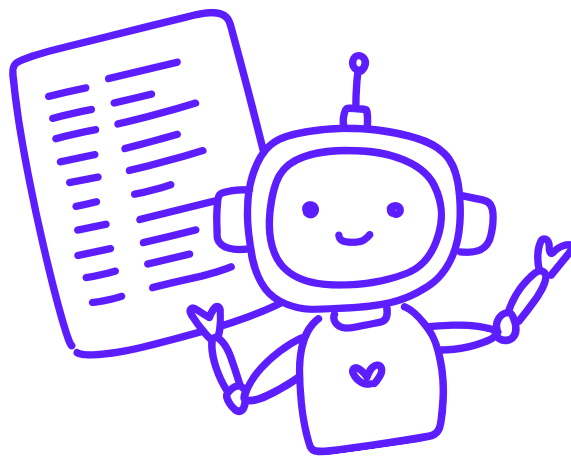
AI FOR CUSTOMER SUCCESS GUIDEBOOK



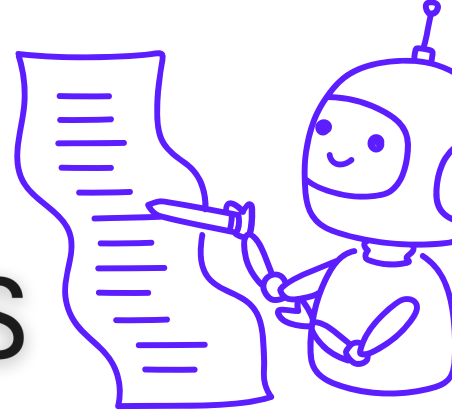
100 Prompts
to Drive
Engagement,
Retention, and
Growth

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HOW TO USE THIS GUIDEBOOK



Overview of AI in Customer Success

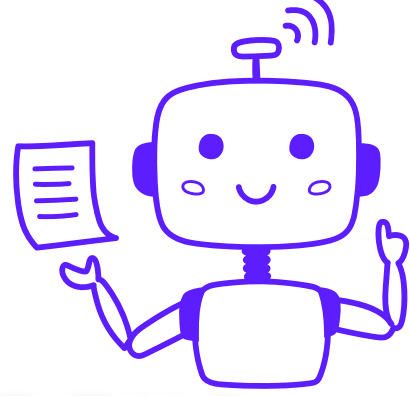
AI is no longer just a buzzword—it's a game-changer in Customer Success. By using AI, CSMs can automate repetitive tasks, predict customer behavior, and deliver personalized experiences at scale.

Imagine being able to proactively engage with customers before they even realize they need help or spot churn risks early on and address them head-on. That's the power of AI in customer success! It enables us to focus on what truly matters—building strong, lasting relationships with our customers.

How to Use This Ebook

This ebook is your go-to guide for incorporating AI into your daily workflow as a CS Pro. It's broken down into practical chapters filled with 10 ready-to-use AI prompts per chapter. They are designed to help you across different areas of customer success, from onboarding and engagement to feedback collection, driving revenue and strategic planning.

Each chapter is focused on a specific aspect of the customer journey and provides prompts you can plug into your AI tools right away. Simply pick a chapter that aligns with your current goals, grab a prompt that resonates, personalize the prompt to your company/customer and let AI do the rest! Whether you're a seasoned CS Pro or just starting out, this guide will help you take advantage of AI and hopefully make your work life a whole lot easier.



PROMPTS FOR CUSTOMER ONBOARDING



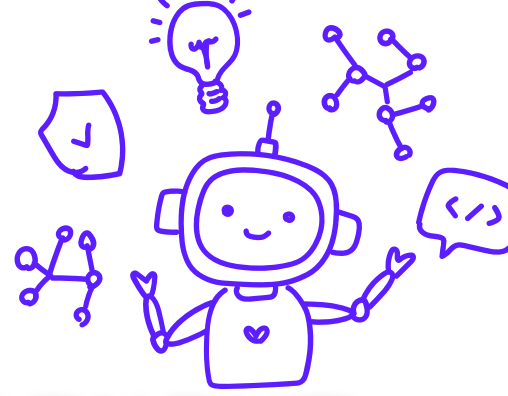
You should start all of these prompts with 'assume the role of a CSM at [your company name]' and also fill in the [brackets] with relevant data about your company, customer, product etc

- 01 Prompt: Generate a personalized welcome email for a new customer in the [industry] sector, outlining the first three steps they should take to get started with our [product/service] and highlighting key resources available to them.
- 02 Prompt: Create a series of 5 onboarding emails that guide a new user through the setup process of our [product/service], ensuring each email has a clear call to action and focuses on a different feature or benefit.
- 03 Prompt: Draft a script for a customer onboarding call where we walk the user through the dashboard, key features, and best practices for maximizing the value of our [product/service]. Include a section for addressing common questions or concerns.
- 04 Prompt: Write a personalized follow-up email to be sent 7 days after a customer starts using our [product/service], asking them about their initial experience, offering additional resources, and encouraging them to schedule a call if they need further assistance.



If these prompts don't give you exactly what you are looking for make sure in the same thread you continue to ask your AI bot to [clarify](#) or [give you more options](#).

- 05 Prompt: Generate a step-by-step interactive onboarding checklist that customers can follow to ensure they are fully set up with our [\[product/service\]](#). Include tips for each step and links to relevant knowledge base articles or videos.
- 06 Prompt: Create an onboarding survey to be sent to customers after their first 30 days, asking for feedback on their experience so far and what could be improved to help them reach their goals with our [\[product/service\]](#).
- 07 Prompt: Draft a template for a personalized onboarding success plan that outlines key milestones, success criteria, and customized recommendations for a new customer based on their specific [\[use case\]](#) and [\[goals\]](#).
- 08 Prompt: Write a reminder email template to be sent when a new customer hasn't completed a critical onboarding step, such as setting up their account or scheduling their first training session, with a friendly nudge and helpful resources.
- 09 Prompt: Create a video script for a 3-minute onboarding tutorial that introduces new customers to the top three features of our [\[product/service\]](#). The script should be engaging, easy to follow, and highlight how these features can help them achieve their specific goals.
- 10 Prompt: Draft a step-by-step technical integration guide for new customers that outlines how to seamlessly connect our [\[product/service\]](#) with their existing tools or platforms (e.g., CRM, ERP, etc.). Include code snippets, troubleshooting tips, and contact information for technical support if they encounter any issues.



PROMPTS FOR CUSTOMER ENGAGEMENT



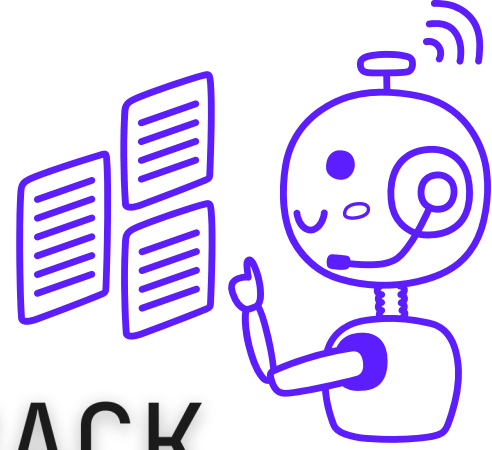
You should start all of these prompts with 'assume the role of a CSM at [your company name]' and also fill in the [brackets] with relevant data about your company, customer, product etc

- 11 Prompt: Generate a personalized follow-up email for a customer who hasn't logged in or engaged with our [product/service] in the past 30 days, reminding them of the key features they may have missed and offering a 15-minute check-in call.
- 12 Prompt: Write a script for a customer success webinar aimed at advanced users, focusing on best practices, advanced tips, and a live Q&A to help them maximize the value of our [product/service]
- 13 Prompt: Create an email sequence for re-engaging a churned customers, starting with a gentle reminder of the benefits of our [product/service], followed by a case study showcasing how a similar customer achieved success, and ending with a special offer to encourage resubscribing.
- 14 Prompt: Write a template for a customer success check-in email that is personalized based on recent customer activity, highlighting new achievements, offering tailored tips, and suggesting next steps to take full advantage of our [product/service].



Sometimes AI makes things up. To keep this from happening, in your prompts I would add at the end 'do not lie or make up stuff' when prompting your AI tool.

- 15 Prompt: Generate a customer advocacy email that invites highly engaged users to participate in case studies, provide testimonials, or join a customer advisory board, emphasizing the benefits and recognition they would receive for their participation.
- 16 Prompt: Create a detailed plan for a virtual customer meetup or roundtable event where customers can share their experiences, best practices, and challenges using our [product/service], with facilitation guidelines and discussion topics to drive meaningful engagement.
- 17 Prompt: Develop a personalized onboarding dashboard that visually tracks a customer's progress through the onboarding process, offering badges, milestones, and tips for each stage to encourage completion and ongoing engagement.
- 18 Prompt: Design a customer journey map that outlines key engagement touchpoints throughout a customer's lifecycle with our [product/service], including automated actions, personalized content, and resources at each stage to enhance their experience.
- 19 Prompt: Create a customer health scoring model that uses engagement metrics (such as login frequency, feature usage, and support interactions) to predict customer satisfaction and identify opportunities for proactive outreach.
- 20 Prompt: Create a personalized product usage dashboard that provides customers with insights into their activity, progress, and achievements within the [product/service], along with tailored recommendations for features they haven't explored yet or areas where they could get more value.



PROMPTS FOR CUSTOMER FEEDBACK



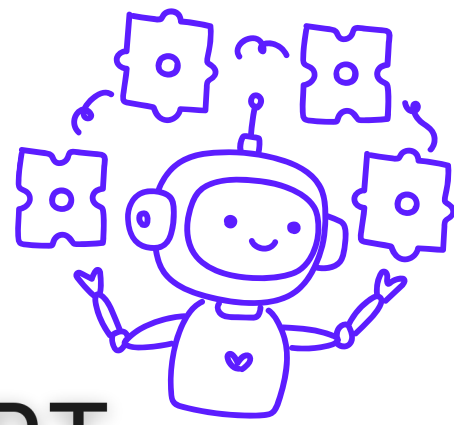
You should start all of these prompts with 'assume the role of a CSM at [\[your company name\]](#)' and also fill in the [\[brackets\]](#) with relevant data about your company, customer, product etc

- 21 Prompt: Design a quarterly customer satisfaction (CSAT) survey with a mix of quantitative and qualitative questions that gauge overall satisfaction, feature usability, and potential areas for new development.
- 22 Prompt: Generate a list of open-ended questions to ask during a one-on-one customer interview, aimed at understanding their specific pain points, desired outcomes, and how our [\[product/service\]](#) fits into their workflow.
- 23 Prompt: Create a framework for analyzing customer feedback data, including methods for categorizing responses, identifying common themes, and prioritizing action items based on impact and effort.
- 24 Prompt: Generate an AI-powered sentiment analysis model to categorize customer feedback as positive, neutral, or negative, and suggest next steps for improving customer experience based on each sentiment group.



To make your AI prompts work better, **be clear and give as much detail as you can**. Don't just use vague or general instructions—be specific about who it's for, the tone you want, what you're trying to achieve.

- 25 Prompt: Outline a process for combining qualitative feedback from surveys and interviews with quantitative data (like usage metrics) to uncover deeper insights into customer behavior and preferences.
- 26 Prompt: Create a product improvement roadmap presentation template that incorporates customer feedback, highlighting which features or updates are being prioritized and why.
- 27 Prompt: Generate an email sequence for upselling customers who have expressed satisfaction with a particular feature, offering advanced plans, add-ons, or complementary services that align with their needs.
- 28 Prompt: Outline a strategic plan for a quarterly 'Voice of the Customer' meeting with the product, sales, and marketing teams, focused on reviewing feedback trends, discussing customer insights, and aligning on action items.
- 29 Prompt: Develop a guide for building a customer advisory board that regularly provides feedback on new features, beta tests, and strategic decisions, ensuring a continuous loop between customers and the company.
- 30 Prompt: Design a post-churn survey to be sent to customers who have recently canceled their subscription or stopped using our [\[product/service\]](#), focusing on understanding their reasons for leaving, what could have been done differently, and if there are any conditions under which they would consider returning.



PROMPTS FOR CUSTOMER SUPPORT



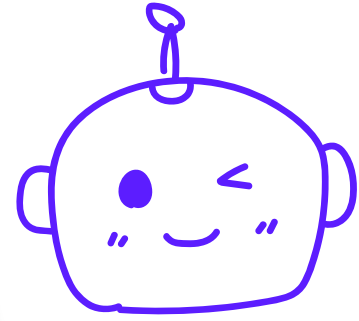
You should start all of these prompts with 'assume the role of a CSM at [your company name]' and also fill in the [brackets] with relevant data about your company, customer, product etc

- 31 Prompt: Generate a customer support playbook for onboarding new support team members, including common customer queries, preferred resolution pathways, and best practices for maintaining a positive customer experience.
- 32 Prompt: Create a framework for a tiered support system that segments customers based on their subscription level or account value, detailing the types of support each tier receives and the criteria for escalation.
- 33 Prompt: Draft an email template for responding to a customer who reported a technical issue with our [product/service], acknowledging the problem, explaining the steps being taken to resolve it, and providing a timeline for updates.
- 34 Prompt: Write an empathetic email template for handling a situation where a customer has experienced a recurring issue, acknowledging the repeated inconvenience, assuring them of a permanent fix, and offering a goodwill gesture.



Provide **background information** and **context** to help the AI understand the scenario better. This could include details about your business, the customer's journey, or the purpose of the content

- 35 Prompt: Create a template for a personalized support follow-up email that suggests an upgrade or add-on based on the customer's current needs, usage patterns, or feedback received during the support conversation.
- 36 Prompt: Generate a chat script for a customer support agent to recommend a premium support package or additional services after resolving a complex issue for a high-value customer.
- 37 Prompt: Develop a knowledge base article template for documenting solutions to common support issues, including step-by-step instructions, screenshots, and links to related resources.
- 38 Prompt: Outline a process for conducting regular support ticket audits to identify recurring issues, assess the quality of resolutions, and develop action plans for improving response times and customer satisfaction.
- 39 Prompt: Create a template for an automated support ticket acknowledgment message that reassures customers their issue is being addressed, provides an estimated response time, and includes links to helpful resources.
- 40 Prompt: Write a script for a customer support call where the agent needs to deliver bad news about a delayed fix or feature, ensuring the conversation remains empathetic, clear, and solution-focused.



PROMPTS FOR DATA ANALYSIS



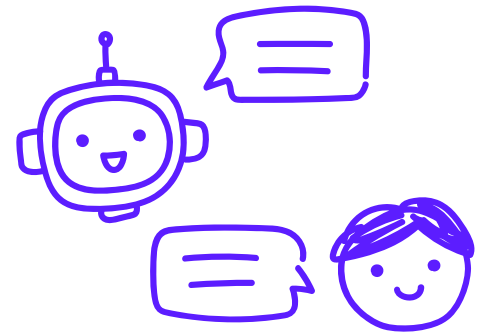
You should start all of these prompts with 'assume the role of a CSM at [your company name]' and also fill in the [brackets] with relevant data about your company, customer, product etc

- 41 Prompt: Develop a checklist for regular data quality audits, focusing on cleaning, validating, and standardizing customer data to ensure accuracy in reporting and decision-making.
- 42 Prompt: Develop a visual representation of customer lifecycle stages with corresponding metrics highlighting customer progress, engagement, and potential churn risks, to be included in stakeholder presentations.
- 43 Prompt: Design a dashboard template for visualizing key customer success metrics, such as churn rate, NPS, customer health score, and revenue expansion, to be used in executive meetings.
- 44 Prompt: Create a customer health score report format that combines various data points (e.g., product usage, support tickets, survey responses) to provide a holistic view of customer satisfaction and engagement.



Clearly mention the [format and style you want](#). Whether it's a bullet point list, a step-by-step guide, or a narrative, specifying this helps the AI deliver content that's easier to use.

- 45 Prompt: Generate a data-driven case study outline showcasing a successful customer who achieved significant results using our [\[product/service\]](#), including before-and-after metrics to upsell similar customers.
- 46 Prompt: Develop a revenue growth strategy using customer data to identify upsell and cross-sell opportunities, including triggers such as increased usage, feature requests, or positive feedback.
- 47 Prompt: Draft a strategic plan for using customer data to drive renewal conversations, including data points to highlight (e.g., usage growth, ROI achieved) and personalized renewal offers to present.
- 48 Prompt: Create a personalized email template to be sent to customers after analyzing their usage data, highlighting underutilized features and suggesting ways they can get more value from the [\[product/service\]](#).
- 49 Prompt: Draft an email template for sharing a quarterly customer success report with key stakeholders, summarizing key metrics, trends, and action plans for improving customer satisfaction and retention.
- 50 Prompt: Outline a plan for segmenting customers based on their engagement level, purchase history, and usage patterns to identify high-value customers, at-risk accounts, and upsell opportunities.



PROMPTS FOR CUSTOMER RETENTION



You should start all of these prompts with 'assume the role of a CSM at [your company name]' and also fill in the [brackets] with relevant data about your company, customer, product etc

- 61 Prompt: Create a loyalty program for long-term customers that rewards them with exclusive content, early access to new features, or discounts, with the goal of enhancing retention and driving more revenue.
- 62 Prompt: Create a template for a personalized customer success plan document that outlines specific milestones, goals, and support resources tailored to a customer's unique needs and usage patterns.
- 63 Prompt: Write a script for a customer success call focused on renewal conversations, including open-ended questions to uncover any concerns, demonstrate value, and suggest personalized solutions to drive retention.
- 64 Prompt: Draft a customer success story template to showcase how certain customers have achieved significant ROI with our [product/service], and use this to encourage similar customers to renew or upgrade.



When unsure of the exact style or content you need, [request multiple variations in a single prompt](#). This allows you to compare different outputs and choose the best one.

- 65 Prompt: Write an email template for customers who are approaching their renewal date, including a summary of the value they've gained so far, new features released, and options for renewing or upgrading their subscription.
- 66 Prompt: Draft an email template for a quarterly 'Value Review' with customers, highlighting key achievements, product usage metrics, and suggesting new features or services that can add additional value.
- 67 Prompt: Develop an upsell strategy that leverages customer usage data to identify opportunities for recommending higher-tier plans or additional features to customers who are getting significant value from our [\[product/service\]](#).
- 68 Prompt: Generate a post-renewal email sequence to onboard customers into new features, services, or add-ons they've subscribed to, ensuring they quickly see the value of their upgrade or renewal decision.
- 69 Prompt: Draft an email template for sharing a quarterly customer success report with key stakeholders, summarizing key metrics, trends, and action plans for improving customer satisfaction and retention.
- 70 Prompt: Draft a customer success story template to showcase how certain customers have achieved significant ROI with our [\[product/service\]](#), and use this to encourage similar customers to renew or upgrade.

PROMPTS FOR TEAM COLLABORATION



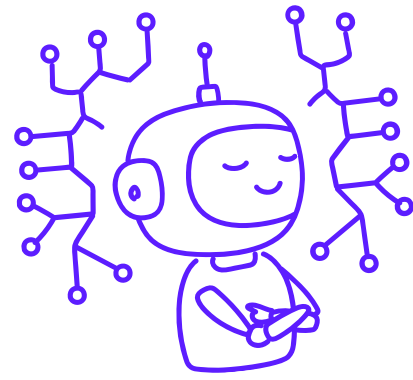
You should start all of these prompts with 'assume the role of a CSM at [your company name]' and also fill in the [brackets] with relevant data about your company, customer, product etc

- 71 Prompt: Develop a strategy for improving collaboration between Customer Success Managers (CSMs) and Sales teams to ensure smooth handoffs and aligned customer communication, including regular syncs, shared resources, and a common knowledge base.
- 72 Prompt: Generate a playbook for aligning the Customer Success and Marketing teams to create customer advocacy programs, such as case studies, testimonials, and referral programs that drive more revenue.
- 73 Prompt: Write a template for a monthly internal newsletter that updates the Customer Success team on key wins, upcoming training sessions, product updates, and important customer insights.
- 74 Prompt: Outline a plan for implementing regular team retrospectives in Customer Success to identify what's working well, what can be improved, and actions to take for continuous improvement in customer engagement and retention.



Tailor the prompt to emphasize **what you want to achieve** or the action you want the AI to encourage. For instance, “Create a compelling call-to-action paragraph for a customer success newsletter”

- 75 Prompt: Generate a playbook for identifying ‘at-risk’ accounts and collaborating with Account Managers to develop personalized engagement plans that aim to retain these customers and drive renewals.
- 76 Prompt: Create a training program for Customer Success Managers focused on recognizing and acting on revenue-generating opportunities, including modules on value-based selling, handling objections, and effective negotiation.
- 77 Prompt: Generate a training schedule for a Customer Success workshop focused on data-driven decision-making, including hands-on sessions on analyzing customer data, creating reports, and drawing actionable insights.
- 78 Prompt: Design a template for a weekly team meeting agenda that encourages collaboration, updates on key accounts, knowledge sharing, and a dedicated slot for discussing challenges and brainstorming solutions.
- 79 Prompt: Generate a template for a Customer Success team feedback survey to gather insights on team collaboration, training needs, and overall satisfaction, with questions focused on identifying areas for improvement.
- 80 Prompt: Create a quarterly Customer Success team offsite workshop agenda that includes team-building activities, deep dives into customer case studies, collaborative problem-solving sessions, and strategic planning for the next quarter.



PROMPTS FOR PERSONALIZATION



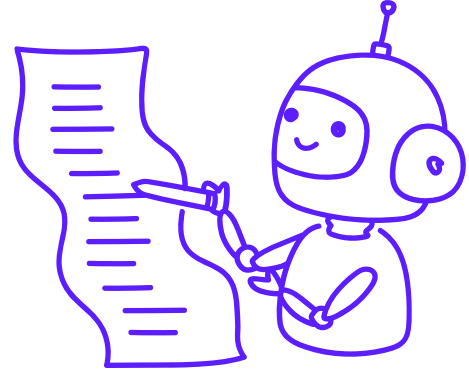
You should start all of these prompts with 'assume the role of a CSM at [your company name]' and also fill in the [brackets] with relevant data about your company, customer, product etc

- 81 Prompt: Create a framework for implementing AI-driven personalization throughout the customer journey, from onboarding and engagement to renewal and advocacy, detailing the data points and triggers needed for each stage.
- 82 Prompt: Outline a strategy for leveraging customer personas to create customized onboarding experiences that cater to different customer goals, challenges, and preferred learning styles.
- 83 Prompt: Create an automated email template that is triggered when a customer achieves a specific milestone (e.g., reaching a usage threshold), celebrating their progress and suggesting the next steps or advanced features to explore.
- 84 Prompt: Develop an automated workflow for identifying upsell and cross-sell opportunities based on customer behavior, usage patterns, and feedback, including automated triggers for outreach and follow-up sequences.



To make your prompts more effective, always clarify **who** the target audience is, **what** specific outcome you want, **why** the task is important, and **how** you expect the AI to deliver the content.

- 85 Prompt: Create a strategy for using predictive analytics to identify and automate engagement with customers likely to upgrade, providing them with personalized offers and educational resources to support their decision.
- 86 Prompt: Draft an email template for announcing a new feature release to customers, explaining what the new feature does, how it addresses a common customer pain point, and including a quick-start guide or video tutorial to help them get the most out of it.
- 87 Prompt: Write an email template for a 'Personalized Feature Highlight' campaign, where customers receive automated emails showcasing features of our [product/service] that align with their specific usage patterns and business goals.
- 88 Prompt: Create an automated renewal reminder sequence for customers approaching their subscription end date, including a series of emails that showcase their achieved ROI, new feature highlights, and an exclusive limited-time discount to encourage early renewal.
- 89 Prompt: Design a revenue-boosting campaign that automatically segments customers into different lifecycle stages and sends personalized messages with relevant offers or upgrades at critical points (e.g., post-onboarding, feature adoption, approaching renewal).
- 90 Prompt: Create an automated recommendation engine that analyzes customer usage patterns and preferences, generating personalized emails or in-app notifications suggesting complementary products, features, or add-ons to drive cross-sell and upsell opportunities.



PROMPTS FOR STRATEGIC PLANNING



You should start all of these prompts with 'assume the role of a CSM at [\[your company name\]](#)' and also fill in the [\[brackets\]](#) with relevant data about your company, customer, product etc

- 91 Prompt: Develop a strategic plan for the next quarter that uses AI to identify key at-risk accounts, prioritize them based on potential revenue impact, and create personalized engagement plans for each segment.
- 92 Prompt: Create an AI-driven model for forecasting customer churn over the next 12 months, taking into account historical customer behavior, usage data, support tickets, and NPS scores, and recommend proactive measures to prevent churn.
- 93 Prompt: Design a data-driven strategic plan for customer segmentation that leverages AI to analyze customer behaviors, preferences, and engagement levels to create more targeted retention and upsell campaigns.
- 94 Prompt: Create a predictive AI model to prioritize customers for renewal conversations based on their engagement, satisfaction levels, and usage patterns, suggesting personalized renewal offers to maximize retention and revenue.



Start your prompts with **clear action verbs** (like “Create,” “Develop,” “Generate,” “Write,” or “Design”) and specify the desired outcome to guide the AI effectively.

- 95 Prompt: Develop an AI-driven approach for continuously analyzing customer sentiment from surveys, social media, and support interactions, using the insights to inform strategic decisions and enhance customer experience.
- 96 Prompt: Create a strategy for setting up AI-powered dashboards that consolidate data from multiple sources (CRM, support tools, product analytics) and provide real-time insights for strategic decision-making in customer success.
- 97 Prompt: Draft a strategic plan for implementing AI-driven customer health scoring models that continuously update based on key metrics (e.g., product usage, support interactions, NPS) to help prioritize CSM efforts and resources.
- 98 Prompt: Outline a strategic framework for co-developing a success plan with customers that incorporates AI insights into their market trends, competitor analysis, and evolving needs, aligning the product roadmap and service offerings to their long-term business strategy.
- 99 Prompt: Create an email template for a ‘Revenue Growth Opportunity’ discussion with a customer, highlighting personalized insights from their recent usage data, identifying specific areas where additional features or services could drive increased value, and suggesting a call to explore tailored upgrade or expansion options.
- 100 Prompt: Create an email template to re-engage a customer showing signs of churn, highlighting key benefits they’ve experienced, acknowledging any challenges, and proposing a call to discuss a tailored plan to enhance their experience.



Want to learn more and apply
these tactics in real life?
Join our CS Pro course!

If you found value in this prompt list of how to unlock revenue while using AI daily then you will enjoy our upcoming cohort course. This master class has limited spaces. Ready to get control of your book of businesses and finally hit your targets? Come learn how to have the strategic conversations that let you stop firefighting and finally focus on customer outcomes... (and look like a rockstar to your boss) in RevUP CSM! Join the waitlist today...

JOIN THE WAITLIST