A challenge many organisations face, especially those who are scaling quickly is just…; "How to remove a CSM from a customer and replace with Tech Touch?". If you are a CSM, think about your customers and how would they react if they no longer had a direct line of communication with you.

Your business is taking on more and more customers and in reality there are only two options.

- You hire more CSM's in your business to manage the growth in your customer base.
- You segment longer tail customers to Tech Touch to free up your CSM's to look after the more premium customers.

The bottom line is, a lot of businesses don't consider these two options as early as they should. Instead they opt to load more and more customers onto the existing CSM's. This is typically bad for a number of reasons:

- CSM's can not do their work as effectively as they should or want to.
- Premium customers don't get the attention they deserve.
- Opportunities for upsell/cross-sell are missed.
- Timelines on deliverables between CSMs and customers are increased or missed.
- CSM's will begin to churn due to becoming frustrated in their role.
- Customers will begin to churn as they are getting inconsistent assistance and poor responses.

Removing a CSM from a customer is going to be hard though?

How to remove a CSM from a customer and replace with Tech Touch?

Done wrong, taking a CSM away can make a customer feel that you are pulling the rug from underneath them. But it doesn't have to be a difficult breakup. Instead, it can be more a case of we both want and need different things but are going to remain the best of friends.

Looker's [Brian LaFaille](#) articulated it really well in a recent webinar on the topic. "Don't present it as a customer losing a CSM, but more as a customer who has now graduated to take the lead." At the same time, Brian LaFaille highlighted, "you can't take a CSM away without the customer feeling they are getting something else, or more in return".

Self Help Resources

Ensure that you give your customers the tools they need to continue on their journey of success. Access to training videos, knowledge bases, online courses, and if the situation is right, an online community. They should also have a mechanism to raise a support case with the support team (not CSM).

Take it slow

Avoid the shock factor. When migrating customers away from a CSM take it slow. Provide your customer with the resources to help themselves, and give them time to digest the new relationship. Reach out to ensure they know how to find what they need and contact support if they need to.

Take it in steps with your customer so they don't feel they are getting abandoned. You want them to feel confident in your product, so much so we think they should take the lead, not a CSM.

Test your process

Once you have your resources in place and have made the decision to migrate some of your customers away from a CSM, start with an amenable customer. Move your first few customers one and a time, this gives you the chance to refine your process and respond/correct any negative reactions.

Thanks for reading.

[James](#) x

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