How to Manage a CSM Portfolio During a Crisis

Episode 22 Companion Download

This Portfolio Crisis Management Toolkit provides the systematic frameworks and response protocols discussed in Episode 22: How to Manage a CSM Portfolio During a Crisis. Use these resources to triage accounts effectively during emergencies, coordinate internal teams under pressure, communicate with customers during disruption, and rebuild relationships after technical resolution. Whether you're facing a security incident, service outage, product failure, or organizational crisis, these tools will help you protect business outcomes while maintaining customer trust across your entire portfolio.

The Crisis Triage Framework

When a crisis hits your portfolio, you have limited time and attention. Triage is not optional - it's how you protect the business.

Critical Tier

These accounts get your immediate personal attention. Phone calls within the first hour, not emails.

Criteria for Critical Tier:

- Renewal within the next 90 days
- Active executive escalation or CEO involvement
- Compliance-sensitive customers (government, healthcare, financial services with audit requirements)
- Strategic partnerships or high-visibility accounts
- Accounts already at risk (yellow or red) before the crisis
- Customers with active business-critical processes affected by the crisis

Your Actions:

- Personal phone call within 60 minutes of crisis awareness
- Acknowledge the specific impact to their business
- Provide realistic timeline for resolution
- Commit to specific follow-up schedule
- Escalate internally to ensure these accounts get priority support

Standard Tier

These accounts need clear communication and responsive support, but they can operate within your normal protocols.

Criteria for Standard Tier:

- Affected by the crisis but not in immediate churn risk
- Healthy relationship with strong champion network
- Renewal timeline 90+ days out
- No compliance or regulatory sensitivities
- Not experiencing business-critical impact

Your Actions:

- Personalized email within 2 hours explaining situation and impact
- Clear timeline for resolution
- Direct contact information for escalation if needed
- Proactive status updates as committed
- Monitor sentiment closely but don't drop everything for every ping

Stable Tier

These accounts get proactive communication but are not your primary focus during acute crisis.

Criteria for Stable Tier:

- Minimally affected by the crisis
- Strong relationship with high trust
- No immediate business impact
- Not in active renewal or expansion discussions
- Customers who can weather short-term disruption

Your Actions:

- Proactive notification within 4 hours with context and reassurance
- Status updates at key milestones
- Available if they reach out, but not actively monitoring minute-by-minute

Not Affected

If customers aren't impacted by this specific crisis, they get no communication. Creating panic where there isn't any damages trust.

Crisis Communication Templates

Initial Acknowledgment (Send Within 60 Minutes)

Subject: [Company Name] Service Disruption - Immediate Update

[Customer Name],

I'm reaching out immediately regarding the [specific issue] affecting [specific service/function]. I understand this is creating [specific impact based on their use case] for your team, and I want to give you a clear picture of our response and timeline.

Here's what we know right now:
[Factual description without speculation - 2-3 sentences maximum]

Here's what we're doing about it:
[Specific actions being taken - engineering deployed, incident response team activated, etc.]

Here's when you'll hear from me next:
[Specific time - "I'll update you by 2 PM today" not "soon"]

Our technical team is [specific action] and estimates [realistic timeline] for [specific outcome].

I'll personally oversee our response for your account. You can reach me directly at [phone] or [email] if you have immediate questions or concerns.

[Your Name]

Technical Stakeholder Update

[Customer Technical Contact],

Following up on the [issue] as committed. Here's the current technical status:

WHAT HAPPENED:
[Technical details - what broke, root cause if known, scope of impact]

CURRENT STATUS:
[What's fixed, what's still in progress, what's being actively worked]

TECHNICAL TIMELINE:
[Realistic estimates with confidence levels - "We expect full restoration by 4 PM, with 80% confidence based on current progress"]

WHAT YOU CAN DO:
[Any workarounds available, actions they can take, what to avoid]

NEXT UPDATE:
[When they'll hear from you again - specific time]

Let me know if you need any additional technical detail or if your team has questions.

[Your Name]

Executive Stakeholder Update

[Customer Executive],

I wanted to provide you with a brief business impact update on the [issue] affecting [their business function].

BUSINESS IMPACT:
[How this affects their operations, risk profile, compliance posture - in business terms, not technical jargon]

OUR RESPONSE:
[What we're doing to protect their business - not just fix the technical problem]

PROTECTION MEASURES:
[What safeguards are in place, how we're preventing escalation, what monitoring we've added]

EXPECTED RESOLUTION:
[Realistic timeline in business terms - "Your team should be fully operational by end of business today"]

I'm coordinating our technical and support teams directly on your account. You can reach me at [phone] for any immediate concerns.

[Your Name]

Post-Crisis Relationship Recovery

Subject: Follow-up: [Issue] Resolution and Next Steps

[Customer Name],

Now that we've resolved the [issue], I wanted to schedule time to discuss how this affected your business and what we can do to rebuild confidence in our partnership.

Specifically, I'd like to understand:
• How the incident impacted your operations and team
• What could have been better in our response
• What you need from us going forward to feel secure in this relationship

This isn't about defending our response or making excuses. I genuinely want to hear your perspective and act on your feedback.

Are you available for a 30-minute conversation [suggest 2-3 specific times]?

[Your Name]

Internal Coordination Protocol

When a crisis hits, your internal team can either amplify your response or create additional chaos. Establish these protocols immediately.

STEP 1: ESTABLISH SINGLE SOURCE OF TRUTH
Create a shared document (Google Doc, Confluence page, Slack channel) where Engineering posts:

- Current status updates
- Timeline estimates
- Customer impact information
- Technical details
- Known workarounds

Everyone on the customer-facing side pulls from this source. No conflicting information.

STEP 2: DEFINE COMMUNICATION OWNERSHIP

- CS owns all customer communication
- Engineering owns technical resolution
- Leadership owns executive escalations
- Sales coordinates with AEs but directs customer questions to CS
- Support follows established escalation protocols

Stay in your lane. If a customer reaches Sales or Support, those teams direct back to CSM.

STEP 3: CREATE INTERNAL UPDATE CADENCE
Sync every 4 hours during acute crisis phase:

- Engineering provides status and revised timelines
- CS reports customer sentiment and escalations
- Leadership makes resource allocation decisions
- Everyone knows what's happening across the board

STEP 4: DOCUMENT EVERYTHING
Create a crisis log that captures:

- Every customer interaction (who, when, what was said, what was committed)
- Every timeline shared
- Every escalation received
- Every internal decision made

You'll need this for the post-mortem. Work from facts, not memory.

Crisis Decision Matrix

You can't give everyone everything they want during a crisis. Make decisions based on business logic. Evaluate every account against these three factors. Allocate resources accordingly.

Prioritization Factors:

Business Impact (Revenue + Timing)

- ARR value of the account
- Renewal timing (next 30/60/90 days)
- Expansion opportunity in pipeline
- Contract value compared to portfolio average

Relationship Risk (Likelihood of Churn)

- Current health score (red/yellow/green)
- Champion strength and engagement level
- History of escalations or issues
- Recent sentiment trends

Strategic Value (Future Potential)

- Reference account status
- Market positioning importance
- Growth potential beyond current contract
- Industry influence or visibility

Post-Crisis Recovery Checklist

The crisis isn't over when the technical problem is solved. It's over when your customers say it's over.

Within 48 Hours of Resolution:

- ☐ Send closure communication to all affected customers with final timeline and root cause summary
- ☐ Schedule post-crisis debriefs with all Critical Tier accounts (2 weeks out)
- ☐ Document lessons learned internally while details are fresh
- ☐ Review all commitments made during crisis and ensure they're tracked

Within 2 Weeks of Resolution:

- ☐ Complete post-crisis debriefs with Critical Tier accounts
- ☐ Document customer feedback from debrief conversations
- ☐ Create action plans for relationship recovery based on specific customer needs
- ☐ Update account plans with crisis impact and recovery steps

Within 30 Days of Resolution:

- ☐ Implement changes based on customer feedback (notification protocols, SLA commitments, check-in frequency)
- ☐ Hold internal post-mortem to identify process improvements
- ☐ Update crisis response protocols based on what worked and what didn't
- ☐ Share learnings with broader CS team

Within 90 Days of Resolution:

- ☐ Monitor sentiment aggressively for delayed churn signals
- ☐ Watch for signs of competitor evaluation
- ☐ Address trust concerns proactively before renewal discussions
- ☐ Demonstrate stability through consistent delivery

Difficult Decisions Framework

During a crisis, you'll have to make hard calls. Here's how to handle them professionally.

Don't:

- Apologize for making a business decision
- Make promises you can't keep to avoid conflict
- Blame other teams for resource constraints
- Over-explain or get defensive

Do:

- Acknowledge the disappointment: "I understand you were hoping for expedited support today"
- Explain the constraints clearly: "Our engineering team is fully allocated to restoring service, and we can't pull resources without affecting recovery timeline"
- Offer alternatives where they exist: "I can schedule dedicated time with our architect next week to address your configuration questions"

- Be honest about what you can and can't do: "I don't have authority to approve service credits beyond $5K, but I can escalate that request to my VP with a recommendation"

Script For Declining Requests:

"[Customer Name], I understand you're asking for [specific request]. Here's my situation: [explain constraint clearly]. What I can do is [offer alternative]. I want to be straight with you about what's possible rather than commit to something I can't deliver. Does [alternative] work, or do you need me to explore other options?"

Crisis Types and Specific Considerations

Security Incidents

- Legal review required before customer communication
- Compliance notification requirements may dictate timeline
- Preserve forensic evidence before taking corrective action
- Customer data access = critical tier automatically
- Document chain of custody for all communications

Service Outages

- Customers discover impact before you tell them = trust damage
- Communicate proactively even with incomplete information
- SLA credits may be automatic - know your contracts
- Twenty-four-seven operations customers need different handling than business hours customers

Product Bugs Affecting Multiple Accounts

- Not all customers notice all bugs - don't create panic
- Communicate only to affected customers with specific impact
- Provide workarounds immediately if available
- Schedule fix deployment around customer change windows when possible

M&A Announcements

- Customers fear contract changes, product sunset, service degradation
- Proactive communication before they hear it elsewhere
- Address contract continuity and product roadmap explicitly
- Executive engagement critical for strategic accounts

Leadership Changes

- Customers worry about relationship continuity and strategic changes
- Introduce new leadership quickly and professionally
- Emphasize continuity of service and commitment
- Use as opportunity to strengthen relationships through transparency

30-Day Crisis Preparedness Plan

Don't wait for a crisis to build your response capability.

Week 1: Assess Current State

- ☐ Review your portfolio and identify which accounts would be Critical/Standard/Stable in a crisis
- ☐ Document current escalation paths and decision authority
- ☐ Identify gaps in your crisis communication templates
- ☐ Review your company's incident response protocols

Week 2: Build Frameworks

- ☐ Create your crisis triage spreadsheet with all accounts categorized
- ☐ Adapt the communication templates to your industry and customer base
- ☐ Document your internal coordination protocol
- ☐ Create crisis log template for documentation

Week 3: Coordinate Internally

- ☐ Align with Sales on crisis communication ownership
- ☐ Confirm escalation paths with Support and Engineering
- ☐ Review decision authority with your manager (service credits, resource allocation, etc.)
- ☐ Establish update cadence expectations with leadership

Week 4: Test And Refine

- ☐ Run a crisis scenario exercise (pick realistic crisis for your industry)
- ☐ Walk through your triage, communication, and coordination steps
- ☐ Identify gaps or unclear processes
- ☐ Refine your protocols based on what you learned

Key Principles for Portfolio Crisis Management

Triage Ruthlessly

Not all accounts get equal attention. Critical accounts get personal focus. Standard accounts get structured communication. Stable accounts get proactive updates. Allocate time based on business impact and relationship risk.

Communicate Fast and Frequently

First message within 60 minutes. Tell customers you see it, you're working on it, and when they'll hear next. Keep commitments. Update even when nothing has changed.

Coordinate Before You Communicate

Single source of truth. Clear ownership. Regular internal updates. Document everything. Your team can amplify or undermine your response.

Customize By Stakeholder

Technical audiences get technical details. Executive audiences get business impact. Operational audiences get workarounds. Don't send the same message to everyone.

Plan For Recovery After Resolution

The crisis ends when customers say it ends, not when the technical problem is fixed. Schedule post-crisis debriefs. Ask for feedback. Act on what you learn.

Make Business Decisions Without Apology

You can't give everyone everything they want. Prioritize based on business logic. Communicate decisions clearly and professionally. Don't make promises you can't keep.

Next Steps and Resources

This guide is part of The Advanced Relationship Management mini-series on ClearPath Conversations:

- **Episode 21:** Stakeholder Mapping 201: What to Do When Everyone Changes
- **Episode 22:** How to Manage a CSM Portfolio During a Crisis
- **Episode 23:** The Art of Saying "No" as a CSM

Upcoming Episodes - The CS Strategy miniseries:

- **Episode 24:** The Internal CS Playbook You Wish You Had
- **Episode 25:** Building Your Personal CS Brand (Without Being Cringe)
- **Episode 26:** Customer Success Metrics That Actually Matter
- **Episode 27:** What Makes a CSM *Great*? My Non-Negotiables

Additional Resources:

- *ClearPath CX Website:* Templates, frameworks, and resources at ClearPathCX.com
- *LinkedIn:* Connect with Mark at linkedin.com/in/markbernardin