How to Engage with the CSM Team (Internal)

04/13/2026 7:20 pm EDT

The CSM team will work with customers - both Key Accounts and all customers - on a variety of topics. See the below matrix for details.

The CSM Case Queue is the managed point for requests directed to the Customer Success team.

This article sets expectations for when and how internal teams should submit cases to the CSM Queue to ensure visibility, accountability, and consistent handling of customer issues.

General Expectations

Prior to escalation to the customer success email/queue, internal resource will:

a. Ensure a case has been submitted
    - If not, instruct the customer to put in a case
b. Ping the case owner for an update
c. Wait 1 business day, then escalate to the customer success email/queue for further ownership
d. To escalate the CSM team, forward the customer's email to customersuccess@boldgroup.com.
    - Emails forwarded to customersuccess@boldgroup.com will create a case for the CSM to work.

All requests to the CSM team must be submitted through a Salesforce Case assigned to the CSM Queue.

- Cases are owned by the CSM team and not individuals to maintain visibility by the whole CSM team. Secondary ownership will be assigned to the resource working the issue.
- CSMs review the queue in a daily standup and assign cases based on workload, urgency, and account ownership.
- Submissions should include clear context, urgency level, and any prior actions taken.
- To ensure proper documentation and visibility, the CSM team cannot accept requests via email or Teams messages.
    - If a request is received this way, the sender will be asked to open a case in Salesforce.
    - This process is not about adding red tape—it ensures:
        - A consistent record of all customer inquiries.
        - Visibility for leadership and cross-functional teams.
        - Accountability and clear ownership.
        - A complete picture of the customer experience, even when there is no open project to track against.

When to Use the CSM Queue

Engagement Type	Applies To	Notes / Clarification
Cancellation requests/exit interviews	All Accounts	CSM will fact-find and document before passing to SalesOps; provide guidance on credits; attempts to save account should be made. CSM will do S&R.

Escalation to facilitate customer communications	All Accounts	When internal teams cannot reach the customer or facilitate owning the customer, communications and engagement is needed.
Beta coordination for product enhancements	All Accounts	Applies to existing products and new features. Limited to key accounts.
Invoice Explanation	All Accounts	CSM will work with the customer on explaining their invoice.
CSM needed on a temp basis	All Accounts	All requests should flow through the governance meeting. Potential criteria for consideration should be if non-assigned CSM is churn risk, executive escalation, or other criteria as decided.
Audit of Cases	All Accounts	Escalate to a CSM if this is requested only after efforts to explain have been exhausted.
Churn Risk	All Accounts	CSM team will monitor customer health through renewals.
Executive Contact Required	All Accounts	Escalate via case to the CSM queue.
Collections / AR support	Key Accounts	Includes outreach (post closed/won status) to confirm payment status; facilitate customer communications on behalf of AR & Collections.
Escalations on critical customer cases	Key Accounts	Use to increase visibility or provide coordinated communication updates.
Cross-department call coordination	Key Accounts	For important customer calls requiring multiple teams.
Retention support/Churn Risk	Key Accounts	Only when a CSM is assigned, focus on accounts at risk of churn.

Submitting a Case via the CSM Queue

- Navigate to: **Salesforce > Cases > select "Customer Success"** from the drop-down filter.
  - Or use the direct link: Customer Success Case Queue *TIP* Bookmark this link for quick access.
- When submitting to the CSM Queue, please include:

1. Customer account name, account number, contact name and info.
2. Reason for submission (e.g., escalation, renewal, cancellation, retention risk).
3. Summary of situation (what's been tried, what outcome is expected).
4. Relevant documentation (emails, agreements, customer comms, etc.). Please make note of what the attached files are.
5. Description of what you're asking the CSM team to do (e.g., call the customer, escalate, work w/ the PMs, set up a meeting, etc.)
6. Anything the customer is expecting from us.
7. Urgency level: Critical, High, Medium, or Low.

Refer to How to Submit a Case to the CSM Queue (Internal)

Special Scenarios

- **RMR**: If customer is running their first RMR, submit a case marked Critical to the CSM queue so it is monitored proactively.
- **Training**: If request is training-related, CSM may redirect to Application Consultant/Training team.
- **Dev Involvement**: Consider including Dev in customer training for complex workflows; cases should still flow through the CSM queue.

> - CSM monitors cases proactively and will follow up directly with customers when appropriate.
> - "This should be resolved. Can you check with the customer?" is not sufficient. Please include details of what has been done and what action you expect from CSM.
> - Key accounts will be assigned a dedicated CSM for a defined period; engagement terms and renewal of that assignment are being finalized.

Internal SLA Expectations

The CSM team commits to the following service levels when handling cases submitted to the queue by 12:00PM Mountain M-F:

Priority	SLA
Critical	Case will be acknowledged and assigned within a few hours. Resolution may take longer, but same-day customer communication is guaranteed.
High Priority	Case will be acknowledged and assigned within 1 business day.
Medium & Low Priority	Aim to acknowledge within 1 business day. Resolution or assignment may take longer depending on workload and case type.