

# Customer Communication Standards - CSM

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## Purpose

This article defines the communication standards the CSM team follows when engaging with customers. The goal is to ensure clarity, consistency, and empathy in all interactions, while holding ourselves accountable to timelines that match our SLA commitments.

## Core Principles

1. **Proactive, not reactive** – Anticipate customer needs by reviewing health metrics, dashboards, and case queues regularly.
2. **Empathetic communication** – Acknowledge the customer's perspective, validate their concerns, and communicate in a professional yet approachable tone.
3. **Clarity and transparency** – Set expectations upfront about next steps and timelines. If delays occur, communicate them clearly and reset expectations.
4. **Consistency across accounts** – Use the same standards regardless of account size, ensuring fairness and reliability.
5. **Documentation-first** – Record all meaningful communication in Salesforce (cases, notes, internal comments) to ensure visibility across teams.

## Response Time Standards (aligned to CSM SLAs)

When managing cases or responding to customers, follow these internal expectations:

### Critical:

- Response to customer same day (within a few hours).
- Case assigned out immediately.
- Resolution may take longer, but communication must be timely and ongoing.

### High Priority:

- Respond to customer within 1 business day.
- Assign case to appropriate CSM for action.

### Medium & Low Priority:

- Aim to respond within 1 business day.
- Resolution or assignment may take longer, depending on workload and urgency.

# Setting Expectations with Customers

We agreed that customers should always know:

- What happens next – outline steps clearly (e.g., “I will connect with Product, then update you by end of day tomorrow”).
- When they will hear from us – commit to a specific timeline, even if it’s just an update without resolution.
- Who is responsible – clarify whether the next action belongs to CSM, Support, Product, or the customer themselves.
- Boundaries and scope – explain what we can and cannot change (e.g., “Our software cannot be customized for individual workflows, but here’s how we can configure it within best practices”).

## Preferred Communication Practices

- Email – primary channel for documentation and clarity; summarize calls in follow-up emails.
- Phone/Meetings – use for high urgency or sensitive topics; always follow with a written recap in Salesforce.
- Case Comments in Salesforce – for tracking escalations, customer-visible updates, and ensuring accountability.
- Internal Comments – use to share context that should not be customer-facing.

## Examples of Good Communication

- “Thank you for raising this concern. I understand how frustrating it must be. I’ll connect with our Product team this afternoon and send you an update by 3:00PM tomorrow.”
- “I’ve logged this in Salesforce so our Support team can track progress. In the meantime, can you confirm which users are affected so we can prioritize?”
- “This request falls outside of our standard configuration options, but here are two alternative solutions that could meet your needs.”

## Summary

The CSM team holds itself to high standards of responsiveness, empathy, and transparency. By documenting consistently in Salesforce and committing to clear timelines, we ensure customers always know the status of their requests and feel supported in their partnership with Bold Group.

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