# Venn Diagram: KAM vs. CSM Responsibilities

**KAM**

Strategic relationship building

Strategic account planning

Negotiating and closing large deals

Competitive intelligence

Advocacy and influence

Industry expertise

**CSM**

Onboarding and training

Proactive support

Product usage optimization

Customer satisfaction

Relationship management

Product knowledge

**JOINT**

Voice of the customer

Joint business planning

Data analysis

Communication and collaboration

Customer success metrics

Account health monitoring

**Key Account Management Only (Left Circle):**

* **Strategic relationship building:** Cultivating deep relationships with key decision-makers.
* **Strategic account planning:** Developing long-term growth plans aligned with client objectives.
* **Negotiating and closing large deals:** Securing significant contracts and renewals.
* **Competitive intelligence:** Monitoring competitor activity and developing competitive strategies.
* **Advocacy and influence:** Championing the client within the organization.
* **Industry expertise:** Deep understanding of the client's industry and its trends.

**Customer Success Management Only (Right Circle):**

* **Onboarding and training:** Ensuring smooth product adoption and user success.
* **Proactive support:** Resolving customer issues and proactively addressing challenges.
* **Product usage optimization:** Maximizing product adoption and value realization.
* **Customer satisfaction:** Monitoring and improving customer satisfaction metrics.
* **Relationship management:** Building positive relationships with all customer stakeholders.
* **Product knowledge:** Expertise in the product's features, functionalities, and benefits.

**Joint/Overlapping Responsibilities (Intersection):**

* **Voice of the customer:** Capturing and communicating customer needs and feedback.
* **Joint business planning:** Collaborating on plans to achieve mutually beneficial goals.
* **Data analysis:** Utilizing data to understand customer behavior and identify opportunities.
* **Communication and collaboration:** Maintaining open communication and collaboration between teams.
* **Customer success metrics:** Tracking and reporting on key customer success metrics.
* **Account health monitoring:** Proactively identifying and addressing potential customer churn.

## Spark discussions within your key account management and customer success teams:

**Brainstorming Prompts:**

**Overlap Zone:**

* **Which overlapping responsibilities create the most collaboration challenges in your teams?**
* **How can we improve communication and coordination in these areas?**
* **What tools or processes can we implement to streamline collaboration?**
* **What specific metrics can we track to measure the effectiveness of our teamwork?**

**KAM-Specific Responsibilities:**

* **How can CSMs better support KAMs in building strategic relationships with key decision-makers?**
* **How can KAMs leverage their strategic insights to inform CSM efforts in maximizing product usage?**
* **What data or information can KAMs share with CSMs to enable proactive support and issue resolution?**

**CSM-Specific Responsibilities:**

* **How can CSMs effectively communicate customer needs and feedback to KAMs for strategic planning?**
* **How can CSMs tailor their onboarding and training programs to align with KAM-driven account goals?**
* **How can CSMs proactively identify and address potential churn risks, informing KAMs for early intervention?**

**Overall Collaboration:**

* **What are the biggest benefits of strong KAM-CSM collaboration for your customers?**
* **What are the biggest benefits for your teams (e.g., increased efficiency, improved morale)?**
* **What joint success stories can we celebrate to motivate and inspire further collaboration?**
* **How can we create a culture of open communication and knowledge sharing between teams?**

**Instructions:**

1. Download the KAM & CSM Venn Diagram and share it with your teams.
2. Choose 1-2 discussion prompts to focus on based on your team's current challenges or priorities.
3. Schedule a dedicated brainstorming or discussion session.
4. Encourage active participation and creative thinking from all team members.
5. Capture key ideas and next steps for action.
6. Regularly revisit and review your progress towards improving KAM-CSM collaboration.

**Bonus Tip:** Consider inviting a neutral facilitator to guide the discussion and ensure diverse perspectives are heard.

Remember, strong KAM-CSM collaboration is a cornerstone of customer success. Use these prompts and instructions to spark meaningful conversations and empower your teams to work together towards achieving exceptional results!