

CSM daily task checklist

Customer Success Managers juggle a wide range of responsibilities, from building relationships to managing renewals and surfacing product insights.

This daily checklist is designed to help CSMs stay organized, proactive, and impactful each day. Use it to maintain customer momentum, reduce churn risk, and ensure no critical task falls through the cracks.

1. Morning setup (15–30 min)

Start your day with clarity and intention.

- Check calendar for meetings and time blocks
 - Review internal Slack/Teams messages and CS queue
 - Prioritize top 3 accounts to focus on today
 - Review new product updates or feature releases
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2. Customer communication (30–60 min)

Maintain momentum and proactively engage accounts.

- Send follow-up emails to customers from yesterday's meetings
 - Reach out to customers who haven't responded in 7+ days
 - Send a check-in email to top priority accounts
 - Congratulate customers on key wins or milestones (e.g., go-live, usage goal hit)
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3. Account monitoring & health checks (30 min)

Detect signals early and act accordingly.

- Review usage trends for top 5 accounts
 - Check for accounts with low or declining engagement
 - Look for red flags in support tickets or product feedback
 - Identify customers approaching a renewal or QBR (within 30–60 days)
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4. CRM & documentation hygiene (15–30 min)

Keep data clean and your future self thankful.

- Update CRM notes after meetings or email exchanges
 - Add or update health score inputs (e.g., sentiment, product usage)
 - Close out completed tasks and log any customer risks
 - Create follow-up tasks for tomorrow or next week
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5. Internal collaboration (15–30 min)

CS doesn't win alone, keep others in the loop.

- Sync with Sales, Product, or Support on any active issues
 - Flag any churn risks or expansion opportunities
 - Share customer feedback with relevant internal teams
 - Attend stand-ups or team syncs (if scheduled)
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6. Personal & team growth (Optional)

Invest in your development when time allows.

- Skim a CS-related article, webinar, or course module
 - Review feedback from a manager or peer
 - Share a learning or best practice with your team
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End-of-day wrap-up (10–15 min)

- Flag anything urgent for tomorrow
- Clear inbox or snooze messages for follow-up
- Log your day's key activities or updates