

Facilitator Guide

Who are we?

We are a **Customer Success Community** run by Customer Success Managers. We position Nordics as a global leader in SaaS by cultivating a Community that drives excellence in Customer Success. We host face-to-face events every other month because we believe **People** and **Companies** learn better peer-to-peer.

One-stop shop for



in Nordics

Thank you for being our guest!



To share the best of your expertise with our Community, please review the points below, each came from our experience :)



What to expect?

As a Facilitator of a small group discussion, you'll lead a group of 6-8 people in exploring a specific topic. Your main goal is to foster a productive, engaging discussion with some sparks of excitement.

- How will it look like on the actual event?

We will start at 17:10 and first, we will have some intro slides, no longer than 20 min. So, around 17:30 we will start Round Tables and ask people to take drinks and casually select a Table to participate. You will have 80 minutes of facilitated discussions in small groups. We will wrap at 18:50 with short summaries from each table, and we finish the event at 19.00.

Your preparation (general)

- Please book time in your Calendar with our Luma link for the event;
- Prepare your intro - a quick, powerful summary of who you are. Years in Customer Success, your level, maybe top achievement (managed double digits annual revenue, reduced churn to 6%, retained Uber / Volkswagen in 2023). A fun fact also could be a good addition, for example, how many languages you speak, sports you practiced in life, countries you have lived etc. Anything that makes you as you.

Your preparation (deep dive to your expertise)

Imagine yourself after a long working day: what professional discussion will be really fun and challenging for you at the same time? **Create it!** Below, we collected some best practices from Facilitators on previous events using Change Management as a template - please note that on your event the topic will be different.



5 Major Pillars of Round Table Discussions:

- **Quick introduction round** (name company and why you're here);
- **Intro to the task and expectations:** We're here to discuss Change Management;
- **Ice breakers** to get everyone warmed up;
- **Intro to Change Management** and what this topic means to you;
- **Case study and key findings** that we want to share per point. Someone to present.

ICE BREAKERS

- Raise your hand if you've ever had a customer request deprioritized internally, only to have it blow up later?
- Raise your hand if you ever had to deal with a new customer, just to have them already disappointed because sales had promised something that doesn't exist?
- Have you ever had a customer unexpectedly renew when you thought they were churning? What do you think made the difference?

WOULD YOU RATHER (A/B intro):

- Handle a major product outage at a top customer OR manage a reorg where all your champions left?
- Work with a highly engaged but constantly changing customer team OR a stable but disengaged customer?



INTRO to Change Management and what this topic means to you:

At its core, change management is about **facilitating**, **enabling**, and **sustaining change within an organization**.

In CSM work, change takes many forms, such as:

- Customers adopting your product, wanting to make changes or customize it
- Customers restructuring their security, IT, or procurement teams
- Regulatory compliance forcing new processes (e.g., DORA, NIS2)
- Mergers & acquisitions shifting priorities
- Internal restructuring affecting customer engagement (e.g., account handovers)

A CSM's role in change management is not only to support change but to drive and influence it proactively. This requires:

- Strategic alignment with key stakeholders
- Proactive risk identification and mitigation
- Cross-functional collaboration with Product, Sales, and Support
- Clear communication and expectation-setting: how many of you have ever felt stuck between what your customer needs and what your internal teams can deliver?

Most churn risks start months before they become visible. The best CSMs I've seen don't just prevent churn; they turn it into an opportunity. What does that mean to you?



Key Takeaways

1. Change Management is Core to Customer Success

- Change is constant in enterprise SaaS—whether it’s internal (company strategy, product changes, resource shifts) or external (customer reorgs, new leadership, security risks, M&As).
- The best CSMs don’t just react to change—they proactively guide their customers through it.
- Proactive > Reactive → The earlier you recognize change, the more influence you have over the outcome.

2. CSMs Must Be Change Enablers, Not Just Supporters

- Change management is not a single playbook—it’s a combination of strategic thinking, influence, and execution.
- The best CSMs excel at:
 - Identifying risks early before they escalate.
 - Aligning with key stakeholders (not just end users, but leadership).
 - Influencing Product, Sales, and Support internally to drive customer success.
 - Turning reactive escalations into strategic opportunities.

3. Key strategies for turning churn risk into growth:

- Engage higher-level decision-makers (like the CISO in our case).
- Position CSM as a strategic partner, not just a vendor relationship.
- Use crises to introduce innovation and expansion opportunities.
- Follow up with an action plan and long-term commitment, not just a fix.

Closing with a Powerful Thought “CSMs don’t just manage change—we create it. The best customer success teams don’t just react to what’s happening; they guide customers through uncertainty and make sure they come out stronger”.



Group Work Ideas

Exercise 1. Reactive and Proactive Change Management Discussion

How do you define proactive vs. reactive change management?

SPLIT PEOPLE INTO PROACTIVE AND REACTIVE TEAMS IN THE MIDDLE!! →

Everyone lists 2-3 things for reactive and proactive (what is it) + think of a time when you were reactive or proactive in your CSM work (delivery of expectations or preventing churn)

- What are some blockers you've faced in your work that prevent you from being proactive?
- A/B do you think you can plan ahead for change? (what can you plan for, what can't you?)
- A/B is there more proactive change management in your company?
- Provide a situation where change happened suddenly (reactive) vs. one where change was planned (proactive). Have participants identify what was different

Exercise 2. Cross-Functional Collaboration

- Working with Product, Sales, and Support Customer Success is not an isolated function. Successful change requires strong cross-functional collaboration.
- What's one challenge you've faced in working with another internal team? How did you resolve it?
- A/B: sales (or you) over-promising features that don't exist. Has that happened to you?
- What kind of processes do you have for cross-team collaboration, and do you think they are effective?
- What other key teams should CSMs work with or engage with, if any?



Exercise 3. Turning Churn Risk into a New Opportunity.

- Not all churn risks are lost cases. Churn is a direct outcome of poorly managed change—whether the change is happening inside the customer’s organization (e.g., leadership shifts, budget cuts) or externally (e.g., product misalignment, competitive pressure).
- How Customer Reorgs Relate to Change Management: Internal reorganizations are one of the most common but overlooked churn risks.
- Why Collecting & Monitoring Feedback Matters in Change Management: Negative feedback is an early warning system that signals potential churn risks. It helps CSMs proactively manage change by identifying misalignment before it becomes irreversible.
- A/B: do you believe that this statement is true: churn is a direct outcome of poorly managed change?
- Have you ever turned a churn risk into an upsell? What made it work?
- A customer with a new CIO might deprioritize tools purchased by the previous leadership. A proactive CSM would engage early, educate the new CIO on past success metrics, and reposition the tool as a strategic asset instead of just another vendor.
- How to Identify a Churn Risk Early? Low engagement signals, negative feedback or complaints about product fit, budget cuts or internal reorgs at the customer, etc.

FINAL TAKEAWAYS

- Has this session changed your view on what change management is in CSM work?
- What’s one new insight you’ll apply in your work?
- Will you still promise to love your sales colleagues even after they will keep overpromising and leaving you manage the change?



CASE STUDY

Exercise: Managing Change & Churn Risk at Insure Nederland

Context

Insure Nederland, a Dutch insurance provider, has been our customer since 2021, with a contract worth €70K ARR. They operate exclusively in the Netherlands, where all corporate communication is in Dutch, making localization a critical factor in their security awareness strategy.

Customer's Initial Experience & Satisfaction

- Insure Nederland onboarded with our company enthusiastically, excited about automated phishing training and incident response tools.
- They found the training SaaS product impactful and well-received by employees, and early adoption metrics looked best-in-class.
- However, from the beginning, they emphasized that localization was critical, and requested that all phishing simulations be delivered in Dutch to reflect their real-world threat landscape.
- The initial promise from our company was that while English simulations were kept partly included to reflect global threat landscape, increasing Dutch-language content would be explored in the future.



Early Warning Signs & Build-Up to Crisis

Over the course of 2022 and early 2023, several signals were present that indicated potential dissatisfaction brewing:

1. Customer Feedback & Requests

- The Security Awareness Lead at Insure Nederland brought up the issue of English-language simulations in QBRs, highlighting that it made simulations too easy to detect. The Lead proposed that our company creates much more Dutch language content.
- Our internal data showed that employees were spotting English simulations with extremely high success rate, which lowered engagement with the training. Dutch content was more realistically perceived and had a better impact on security behavior change.
- At least two different security team members emailed support asking if there was a way to customize the simulation language balance.
- The CSM acknowledged the concerns but, due to Product de-prioritization, only provided workarounds rather than a resolution.
- A bandage-approach was deployed – an experimental legacy feature flag was applied to the Insure Nederland training service that should affect simulation language content balance.

2. Drop in Engagement & Effectiveness Metrics

- Insure Nederland's early engagement scores were excellent, but over time, employees became less challenged by the training. This caused a peak in negative NPS reviews from users.
- Reports showed that employees had stopped closely analyzing simulation details and instead relied on a quick language check (English = phishing, Dutch = safe) to make their decisions.
- This issue was flagged in monthly check-ins, but no concrete actions were taken.



3. Customer's Internal Discussions on Vendor Alternatives

- The Security Awareness Lead started asking for benchmarks of how other vendors handle localization.
- During a check-in, the customer casually mentioned that they were “exploring the market” but didn’t explicitly threaten churn.
- This feedback was noted by the CSM but wasn’t escalated as a critical issue internally.

The Breaking Point: Crisis Hits

- Q3 2023: Insure Nederland reports a real-world phishing incident in which multiple employees fell for a Dutch-language phishing attack—an attack that they should have been able to identify.
- Employees had been so conditioned by the training format (English = phishing, Dutch = safe) that they missed obvious red flags.
- This was reported internally at Insure Nederland, leading to a strong escalation to the CISO for the first time.
- CISO’s perspective: “We’ve trusted your company for over two years to improve our security awareness, and now we have security alerts from employees clicking malicious links in Dutch language phishing threats. We’ve been asking for this fix for over a year, and nothing has changed. At this point, we are evaluating alternative providers that can guarantee full localization. Let’s meet next week, but you need to explain why we should stay?”
- The CISO sends a direct escalation email, copying the Security Awareness Lead and Procurement, signaling that renewal is at risk.

You, as the CSM, now have a meeting with the CISO next week. This will be your first direct conversation with them...



Your Challenge as a CSM: Salvaging the Relationship & Turning the Situation Around

1. Recognizing Risks + Proactive Change Management

- What were the missed opportunities for proactive change management?
- What early warning signs should have been escalated internally?
- How could the CSM have engaged the Product team earlier to prevent this issue from becoming a crisis?

2. Driving Internal Change & Influence

- Now that it's escalated, how should the CSM ensure this gets prioritized by the Product team?
- What messaging should be used internally to ensure leadership and Product understand the urgency?

3. Structuring the Conversation with the CISO

- How do you acknowledge the mistake without undermining our credibility?
- What steps can you take to reframe the conversation from frustration to partnership?
- How should you position our company's response as a strategic, long-term commitment rather than a reactive fix?

4. Turning a Negative Situation into a Growth Opportunity

- How can you use this engagement to introduce a new, valuable product or service?
- What actions can be taken to make the CISO feel like our company is a proactive security partner rather than just a vendor?
- How do you ensure ongoing executive engagement beyond this issue?

Facilitator Guide

That's it! Thank you for being our Facilitator, it is super important for us.



We are Customer Success managers, the same as you. **We rock!**

If you would like to have some printouts for your group, please let me know.

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Maria

anna.maria.rodberg@gmail.com

+358 44 982 65 70

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