

Customer Notification Email Sample:

Hi Team-

I hope your week is going well. I am reaching out to inform you of some recent changes to our team here at [COMPANY NAME].

I would like to inform you that your designated Customer Success Manager, [FULL NAME], will be leaving [COMPANY NAME] in the coming days as he/she will be pursuing a new opportunity. I have assigned a new CSM to partner with you. Effective immediately, your new designated CSM will be [FULL NAME], cc'd on this email. [NAME] brings a wealth of experience in Customer Success Management and will be an excellent resource for you and your team.

I understand that changes like this can be disruptive to the partnership, but I'd like to assure you that we have done everything possible to make this a frictionless experience for you and the team. Our goal with this change is to increase our cadence of engagement and believe that this will help you transform your use and adoption of our technology.

As a next step, [NAME] will be reaching out to you to schedule your initial meeting. While we have done our best to ensure a proper knowledge transfer, we do want to confirm we have everything we need to continue the partnership with minimal disruption. [NAME] will share the agenda for this meeting and we are confident this will set us up for success.

If you'd like to discuss this change with me in more detail, please let me know, and I am happy to find a time that works. Also, please feel free to forward this email to any additional members of your team to ensure everyone is informed and up to speed.

We appreciate the opportunity to support you and look forward to the future.

Warm regards,
[NAME]

CSM Response Sample:

Hi Team-

It's a pleasure to meet you. As [NAME] mentioned, my name is [FULL NAME] and I will be your new designated Sr. Customer Success Manager. I will serve as your primary point of contact at [COMPANY NAME] and will work to properly orchestrate the partnership moving forward. Please feel free to connect with me on LINKEDIN (hyperlink) as well.

As an immediate next step I'd like to schedule a meeting with the team to align on the partnership and design our go forward plan. Below is an outline the agenda for the discussion:

1. Align on your Business
2. Team Introduction
3. Confirmation of Goals
4. Partnership Review
5. Next Steps

One of the most critical parts of this discussion will be goal setting. We are hoping to outline your partnership goals as well as the business metrics you are working to improve. I do ask that you be prepared for this discussion so we can maximize the value of our time together.

I recommend we schedule 60 minutes for this initial meeting and as an immediate next step we will also establish our regular cadence of engagement.

I want to assure you I am doing everything possible to make this transition a seamless one, and I believe that change can be good as well, so hopefully you will view this as an opportunity to strengthen the relationship in time.

Please let me know if you are available [DAY/TIME] for our meeting. If this does not work for you, please let me know and I will work to find an alternative time.

Warm regards,
[NAME]