

## AI Prompts for CSMs

Some AI prompts you may find helpful using the PLAN prompt framework

**NOTE:** Anything in **[brackets]** indicates something you need to include

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### Prompt 1: Understanding Your Customer

#### Get the 3Cs: Company, Customer, Challenge

**Purpose.** Create a pre-meeting briefing that helps me run a high-leverage conversation with my customer as defined in the audience context below, and identify the most strategic topic(s) to lead with to achieve my objective: **[your specific objective for the meeting]**.

#### Limits

- Use up-to-date public sources and include citations for all factual claims.
- Focus primarily on the last 90 days; include older context only if it explains why the last 90 days matter.
- Prioritize signal over volume. If information is uncertain, label it as uncertain and explain why.
- Keep the briefing scannable: short paragraphs + bullets. Avoid generic company boilerplate.
- Explicitly call out strategic risks, tradeoffs, and “what could go wrong” for the customer.
- Tie recommendations to what **[Your Company]** can credibly influence/deliver **[Optional: Mention your specific products, capabilities, or services]**.
- Incorporate these additional focus areas: **[specific area. e.g., international expansion, margin pressure, support ops, retention, product launch, compliance]**.

#### Audience Context

- Me: **[Your Role]** at **[Your Company]**. I've supported this customer for **[time period]**.

- Customer: **[Customer Company Name]**. Meeting with **[Customer Contact Name]** who is the **[titles/roles]**. **[Add anything you know about the individuals. Eg: time-constrained, ROI-driven, skeptical of fluff, likes data, risk-averse, etc...]**.

(Optional): Any Known context about their business and current state: **[Add this here]**

## Needed Output

Provide a comprehensive briefing with these sections and headers:

### 1) Core Business Profile

- What they sell (products, pricing model if public, channels)
- Primary target customer (demographic + psychographic)
- Competitive landscape (direct + adjacent substitutes)

### 2) Current Strategic Focus & Challenges (Last 90 Days)

- Major initiatives, investment areas, and scaling constraints
- Any reported metrics or outcomes **[Include additional context if possible]**
- Risks to growth and customer experience

### 3) Key Stakeholder Profile(s) and focus

For each customer contact, provide the following:

- Background and role scope
- Current priorities and incentives (what they're measured on)
- Likely stance toward your company (supporter, skeptic, neutral) and why (cite if public)
- What they will care about in this meeting (2–3 bullets)

### 4) Actionable Insights

- The single most strategic, forward-looking topic I should lead with
- Why it matters now (business case)
- 2–3 meeting “lead lines” I can use to open the discussion
- 3 proof points or questions to validate fit in the meeting

Keep the briefing scannable: short paragraphs plus bullets, avoiding generic company boilerplate

## Prompt 2: Preparing Strategic Questions for Discovery

**Purpose:** Create a series of strategic questions to help me achieve this **[Meeting purpose]**. The questions should create productive tension and naturally lead the customer to achieve the meeting purpose.

### Limits:

- Create 8–10 strategic discovery questions
- Questions must be inspired by Bob London’s radically authentic discovery approach (See examples below)
- Avoid generic or polite discovery questions
- Each question must expose at least one of: A risk, a tradeoff, a missed opportunity
- Tone: direct, executive, commercially grounded [adjust as needed]

### Audience Context:

- Audience: **[Customer Name], [Customer Contact Names], [Customer Contact titles]**
- Context to assume: **[Add in additional context about the customer's situation, recent interactions, or known challenges]**

### Needed Output:

- Organize questions into three buckets, in this exact order:
  - High-level business priorities
  - Current challenges/pains
  - Implicit Gaps, Risks & Tradeoffs
- Questions should progress naturally from:
  - Overall business strategy
  - Your customer contacts’ personal priorities
  - Questions about your product and company
- Output only the questions, clearly grouped by bucket
- No explanations, commentary, or product pitching
- Order the questions to fit a 5-10 minute conversation
- Provide commentary for each bucket on why to ask these questions

## RADICALLY AUTHENTIC DISCOVERY QUESTIONS FROM BOB LONDON

### A. ABOUT YOUR CUSTOMER’S BUSINESS

1. What do you think is the biggest priority or challenge your board is discussing?

2. Who is your customer and what's the biggest challenge they need you to solve?
3. Out of your entire job description, what's the one thing your company is counting on you to get done?
4. What's the one thing you and your team need to get better at this year?
5. What absolutely has to be off your whiteboard in the next 90 days?

## **B. ABOUT YOUR CUSTOMER CONTACTS**

6. If I gave you a magic wand, what problem would you make disappear first?
7. What's the hardest part of your job?
8. What request or call do you most dread getting?
9. What are we great at — better than anyone else?
10. If your boss knew you were talking to me, what would they want you to tell me or ask me?

## **C. ABOUT YOUR PRODUCT**

11. On a scale of 1–5, from no-sweat to excruciating, what would it be like to change providers?
12. If you were having coffee with our CEO, what would you say?
13. What's one thing that surprised you since you signed the contract?
14. If a competitor contacted you today, would you ignore them or want to learn more?
15. What would make you a customer for life?

**Prompt: Assess your meetings**

## **Prompt 3: Evaluate Meeting Quality**

**Note:** You need to upload the meeting transcript from your meeting with this prompt. In addition, before the prompt gives you a full output, it will ask you the meeting purpose if it wasn't stated in a previous prompt.

**Purpose:** You are a call-assessment AI. Your job is to evaluate customer call transcripts I upload using what is outlined below.

Your goal is to help me run more strategic meetings: build deeper relationships, uncover real business challenges, and drive toward a clear meeting outcome.

Before you assess the transcript, ask me: "What was the meeting goal or desired outcome?"

### **Limits**

- Use only what is in the transcript plus the meeting goal I provide. Do not invent context.
- Be concise and structured. Prioritize the highest-leverage feedback over exhaustive notes.
- When you make a judgment, point to the evidence (quote a short excerpt or reference the moment) and keep quotes short.
- Count Open Questions (OARS) and assess whether they drove business discovery vs. surface-level support.
- Focus primarily on patterns and repeatable improvements, not one-off nitpicks.
- Tone: supportive, direct, growth-oriented.

### **What to analyze**

#### OARS Framework

- Open Questions: count them; evaluate quality and depth (business outcomes, metrics, root cause, decision process).
- Affirmations: did I recognize effort/strength/insight to build trust?
- Reflections: did I reflect facts + feelings to confirm understanding and advance the conversation?
- Summaries: were summaries used to align, transition, and drive next steps with owners and dates?

#### Strategic Conversation Indicators

- Clear agenda + gave customer chance to adjust meeting focus
- Root-cause discovery vs. symptoms
- Tied to business outcomes, success metrics, organizational goals
- Proactively influenced the conversation (not reactive)
- Added insight (benchmarks, stories, perspective)

## Depth of Discovery

- Meaningful follow-ups
- Space for customer to speak
- Identified whitespace / expansion potential

## Relationship-Building & Executive Presence

- Empathy + authority + clarity
- Preparation and context awareness
- Adapted to stakeholder seniority
- Appropriate personal connection

## Commercial Awareness (Renewal + Expansion)

- Risk signals
- Expansion signals
- Linked product usage to business value
- Strengthened renewal path through trust + value alignment

## Audience:

- Primary (the person running the meeting): **[Your full name], [Your Role] at [Your Company]**
- Secondary: Other colleagues from our company on the call
- The customer or customers that are on the call: **[Customer Contact Names] [Customer Company]**

## Needed output:

Keep it concise and easy to scan.

### A) Summary Scorecard (0–10 per category)

- Open Questions - use open questions more than closed questions. 7:3 ratio at least
- Affirmations

- Reflections - Use 1-2 reflections
- Summary Delivered - At least 1 summary and it's mandatory to do a summary at the end of the meeting
- Depth of Discovery
- Strategic Influence
- Executive Presence
- Renewal/Expansion Awareness
- Trust & Relationship Building
- Overall Strategic CSM Score

## B) What You Did Well (3–5 bullets)

- Recurring strengths

## C) Growth Opportunities (3–5 bullets)

- Patterns to improve (not isolated moments)

## D) Suggested Phrasing & Talk Tracks

Provide ready-to-use examples for:

- Strategic openers
- Reflective statements
- Executive-level outcome questions
- Expansion discovery questions