

Customer Success English Participant Workbook

Practice pages for realistic field-specific meetings, pushback, documentation, and role-play preparation

Audience: customer success managers, account managers, onboarding specialists, support escalation leads, renewals managers, implementation teams, and post-sale revenue leaders

Focus: A customer success English curriculum for onboarding, adoption, health scoring, escalations, QBRs, renewals, churn risk, difficult customers, product feedback, and expansion conversations.

Designed for advanced ESL learners who already use professional English and need industry-specific terminology, realistic meetings, role-play pressure, careful pushback, and polished workplace outputs.

Teaching stance: this is language and workplace-communication training, not legal, medical, financial, safety, or regulatory advice. Instructors should connect every scenario to the learner's current company policies, local rules, and approved procedures.

How to Use This Workbook

For each module, define the terms, identify the decision pressure, write a careful response, and practice the conversation aloud. Strong answers are specific, calm, evidence-aware, and tied to owner and next step.

Module 1. Onboarding and Implementation Expectations

Situation

A customer expects go-live in two weeks despite incomplete data.

Stakeholder pressure: Promise the date to maintain excitement.

Constraint: Scope, data readiness, customer owner, training, and risk need alignment.

Terms to use

- onboarding
- go-live
- implementation
- customer owner

Evidence, owner, or policy boundary

Pushback sentence

Draft the onboarding expectation reset

Module 2. Adoption Metrics and Health Scores

Situation

Usage is high but key stakeholders are disengaged.

Stakeholder pressure: Mark the account healthy.

Constraint: Depth of adoption, business outcomes, sponsor engagement, and support trends matter.

Terms to use

- adoption
- health score
- stakeholder engagement
- usage

Evidence, owner, or policy boundary

Pushback sentence

Draft the account health analysis

Module 3. Support Escalations and Incident Communication

Situation

A strategic customer has a recurring defect.

Stakeholder pressure: Promise engineering will fix it this week.

Constraint: Severity, workaround, reproduction, priority, and communication cadence need agreement.

Terms to use

- escalation
- severity
- workaround

- SLA

Evidence, owner, or policy boundary

Pushback sentence

Draft the escalation update

Module 4. QBRs and Business Outcomes

Situation

A QBR deck lists activity but no outcomes.

Stakeholder pressure: Add more usage charts.

Constraint: Customer goals, outcomes, risks, recommendations, and executive asks should guide the story.

Terms to use

- QBR
- business outcome
- ROI
- executive sponsor

Evidence, owner, or policy boundary

Pushback sentence

Draft the QBR narrative

Module 5. Renewals and Churn Risk

Situation

A customer delays renewal conversations and complains about value.

Stakeholder pressure: Offer a discount.

Constraint: Adoption gaps, unresolved issues, executive alignment, and commercial terms need a recovery plan.

Terms to use

- renewal
- churn risk
- commercial term
- value gap

Evidence, owner, or policy boundary

Pushback sentence

Draft the renewal risk plan

Module 6. Expansion and Upsell Ethics

Situation

Sales wants to upsell before the customer is live.

Stakeholder pressure: Pitch the expansion anyway.

Constraint: Readiness, value proof, use case, and customer trust must be considered.

Terms to use

- upsell
- expansion
- use case
- readiness

Evidence, owner, or policy boundary

Pushback sentence

Draft the expansion readiness note

Module 7. Product Feedback and Feature Requests

Situation

A customer says a missing feature is a deal breaker.

Stakeholder pressure: Demand that product build it.

Constraint: Segment fit, revenue impact, workaround, frequency, and roadmap tradeoff need assessment.

Terms to use

- feature request
- roadmap

- workaround
- product feedback

Evidence, owner, or policy boundary

Pushback sentence

Draft the feature request brief

Module 8. Difficult Customers and Boundary Setting

Situation

A customer threatens escalation unless all issues are fixed by tomorrow.

Stakeholder pressure: Accept the demand.

Constraint: Priority, feasibility, contractual commitments, and respectful boundaries need clear communication.

Terms to use

- boundary
- executive escalation
- commitment
- expectation setting

Evidence, owner, or policy boundary

Pushback sentence

Draft the customer boundary script

Capstone Simulation

Lead a cross-functional meeting in customer success. Choose four modules from this workbook, connect the risks, and prepare a five-minute update with decision, evidence, constraint, owner, and next step.
