

THE ENTERPRISE CSM'S

AI Prompt *Book.*

28 prompts I actually use on a 24-account enterprise portfolio. Written by a practitioner, not a vendor.

28

PROMPTS

7

CATEGORIES

24

ACCOUNT PORTFOLIO

100%

FIELD TESTED

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01 **Account Triage & Risk Sensing**

The Monday-morning stack.

02 **Discovery & Call Prep**

15 minutes to sound like you've been thinking all week.

03 **Live Meeting Support**

A second brain for the call.

04 **Executive Communication**

Every sentence earns its place.

05 **QBR & Strategic Planning**

Turn noise into narrative.

06 **Renewal & Expansion**

The renewal is decided 90 days before the conversation.

07 **Retro & Continuous Improvement**

Turn your own work into a feedback loop.

The quality of the output is the quality of the context you load. Every prompt assumes you're bringing your own customer data. Steal these, bend them, and make them yours.

Account Triage & Risk Sensing

The Monday-morning stack — before you open a single email.

PROMPT 01.1

The 24-Account Weekly Scan

I manage a portfolio of [N] enterprise accounts. Below is a snapshot of usage deltas, ticket volume, and days since last exec touchpoint for each. Rank them into three buckets: needs me this week, monitor, and healthy. For the top 5 in "needs me this week," give me the one signal that tipped them into the bucket and the single action I should take first.

WHY I USE THIS

I stopped trying to look at every account equally. This prompt forces a ranking so I spend Monday on the 5 that matter instead of the 24 that feel urgent.

PROMPT 01.2

Silent Drift Detector

Here are the last 90 days of product usage for [Account]. Don't flag obvious drops — I already see those. Instead, find the subtle patterns: features that were adopted and then abandoned, power users who've gone quiet, workflows that have shifted from daily to weekly. Tell me what story this data tells about how the customer's relationship with the product is actually evolving.

WHY I USE THIS

The loud churn signals are easy. The quiet ones — a champion using the product 40% less — are the ones I miss and regret at renewal. This prompt catches them early.

DATA TO BRING

The quality of the output is the quality of the context you load.

- Last 30–90 days of product usage data
- Open and recently closed support tickets
- CRM account notes and health score
- Any Gong call snippets from the quarter

PROMPT 01.3

Ticket Theme Triangulation

Review the attached support tickets from [Account] over the last quarter. Group them into themes, then tell me which themes represent (a) product friction they're tolerating, (b) training gaps on our side, and (c) real product limitations. Rank by frequency and by which ones most threaten renewal.

WHY I USE THIS

Support tickets are the cheapest signal I have and the one I underuse. Grouping by theme — not volume — is how I find the pattern that becomes a churn story if I don't act.

PROMPT 01.4

Stakeholder Exposure Check

For [Account], here's the list of stakeholders I've engaged with in the last 6 months and the roles they hold. Identify which critical roles I have NO relationship with, which of my existing relationships may have changed jobs, and which stakeholders are probably influencing renewal but aren't in my contact map. Give me a prioritized list of new people I should get introduced to this quarter.

WHY I USE THIS

Single-threaded accounts are how I lose deals. This prompt turns my contact map into a gap analysis so I can fix the exposure before the renewal conversation, not during it.

Discovery & Call Prep

15 minutes to walk in sounding like you've been thinking about this account all week.

PROMPT 02.1

The 15-Minute Prep Sprint

I have a call with [Account] in 15 minutes. Here's the last 3 touchpoints, their recent product usage, and the stated agenda. Give me: (1) the one thing they probably want out of this call that isn't on the agenda, (2) the top 3 things I should mention that will make them feel remembered, and (3) the one question I should ask that will move the relationship forward.

WHY I USE THIS

When I'm in 6 calls a day, prep becomes performative. This prompt forces actual thinking in a compressed window and gives me the 3 things that change the call's outcome.

PROMPT 02.2

The Callback Reminder

Scan the last 5 call transcripts with [Account] and pull out every personal detail they've shared — family, vacations, hobbies, side projects, things they mentioned offhand. Organize them so I can weave 2–3 naturally into the opening of my next call without it sounding like I'm reading a file.

WHY I USE THIS

Enterprise relationships live and die on the small stuff. This one prompt has saved me more account health than any playbook — people remember that you remembered.

DATA TO BRING

The quality of the output is the quality of the context you load.

- Prior call transcripts (Gong or equivalent)
- Email thread history with the account
- Recent product release notes
- Account plan or last QBR deck

PROMPT 02.3

Release Notes → Customer Relevance

Here are our last 4 product releases and release notes. Here's what I know about [Account]'s use case, their stated pain points, and the features they've asked about. Tell me which of the new releases actually matter to this specific customer, draft a 2-sentence framing for each, and flag anything that might accidentally solve a problem they've been paying a competitor to solve.

WHY I USE THIS

Nobody reads release notes. But if I can walk into a call and say "this one ships Thursday and it solves the thing you raised in March," I'm not a CSM anymore — I'm their strategic partner.

PROMPT 02.4

Multi-Stakeholder Agenda Builder

I have a call with [Account] and these attendees [list with roles]. Based on the last 30 days of activity, emails, and open issues, build me an agenda that gives each attendee one thing they personally care about in the first 15 minutes. Flag any topics where the attendees will visibly disagree with each other so I can prepare to navigate it.

WHY I USE THIS

Enterprise calls with 4+ stakeholders are political. This prompt forces me to design the agenda around the room, not the product — which is the difference between a useful call and a forgettable one.

Live Meeting Support

A second brain — running in a side window while the call is happening.

PROMPT 03.1

Mid-Call Objection Unpacker

I'm in a call right now and the customer just raised this concern: [paste]. Here's the context: [account situation]. Give me 3 things to say in the next 60 seconds — one that acknowledges, one that reframes, one that creates a next step. Keep each one under 20 words and don't give me a script, give me the spine.

WHY I USE THIS

I'm not reading from a script live. I need the shape of the response, not the words. This gives me the spine and I fill in my own voice on the fly.

PROMPT 03.2

Did-I-Hear-That-Right Check

Here's the transcript of the call I just got off. Specifically focus on [section or timestamp]. Tell me what the customer actually said vs what I think they said vs what they probably meant. Flag any moments where I may have misread their tone or missed a subtext.

WHY I USE THIS

I catch myself hearing what I want to hear in renewal calls. This prompt is a reality check — it tells me when my optimism is ahead of the actual data.

DATA TO BRING

The quality of the output is the quality of the context you load.

- Live or just-completed call transcript
- Original meeting agenda
- Current account context and open items

PROMPT 03.3

Commitment Extraction

Read this transcript and pull out every commitment that was made — mine, theirs, and anything implied. Separate them into (1) explicit and dated, (2) explicit but undated, (3) implied and fuzzy. For the fuzzy ones, give me the exact quote and a suggested follow-up question to nail them down.

WHY I USE THIS

Fuzzy commitments are how accounts rot. Getting them explicit in writing within 24 hours is the single biggest leverage point I have on account momentum.

PROMPT 03.4

Sentiment Shift Detector

Compare this call transcript to the previous 2 calls with the same customer. Don't summarize them. Tell me whether the tone, engagement level, and energy have gone up, down, or sideways — and point to the specific language or moments that make you think so.

WHY I USE THIS

Account health scores lag by weeks. Sentiment shifts show up in language first. This is my earliest warning system and it's caught two renewals before my CRM knew there was a problem.

Executive Communication

Every sentence has to earn its place. These get your writing to executive register without losing your voice.

PROMPT 04.1

The Executive Summary Compressor

Here's my draft update to a C-level exec at [Account]. Cut it by 50% without losing any of the substance. Lead with the business impact, not the activity. Kill any sentence that starts with "I" unless it's doing real work. Flag any hedging language and rewrite it as a recommendation, not a possibility.

WHY I USE THIS

My first drafts always bury the lede. This prompt forces the compression I'd do in a fourth revision but on the first pass — saving 20 minutes per exec email.

PROMPT 04.2

Bad News, Well Delivered

I need to tell [Stakeholder] that [difficult thing]. Here's the context. Draft 3 versions: one that leads with accountability, one that leads with the fix, one that leads with the impact. Each under 150 words. For each, tell me what kind of exec it works best for and what it risks.

WHY I USE THIS

I don't want a recommendation — I want options with tradeoffs. Different execs take bad news differently, and I'd rather see all three approaches than have the model guess which one fits.

DATA TO BRING

The quality of the output is the quality of the context you load.

- Draft you've already written (don't start from zero)
- Recipient's role and communication style
- The business outcome you want from the message
- Relevant metrics and data points

PROMPT 04.3

The QBR One-Pager

Turn my full QBR deck notes into a one-page executive brief for a CRO who won't attend the QBR but needs to know what's happening with [Account]. Structure: state of the account (2 sentences), what's working (3 bullets), what's at risk (3 bullets), what I need from them (1 ask). No filler.

WHY I USE THIS

Execs don't read the QBR deck. They read the one-pager someone forwards them. If I write it myself, I control the narrative that reaches the people who matter.

PROMPT 04.4

The Internal Escalation Brief

I need to escalate [issue] internally to my leadership. Draft a message that: states the facts without editorializing, frames why this matters to the business (not just to me), proposes 2 specific paths forward with tradeoffs, and ends with the decision I need from them. Keep it under 200 words.

WHY I USE THIS

Internal escalations are where CSMs lose political capital. Framing it as a decision I need — not a problem I'm venting — is the difference between being seen as strategic and being seen as a problem.

QBR & Strategic Planning

Turn a quarter's worth of noise into a narrative the customer can use to justify you internally.

PROMPT 05.1

The QBR Narrative Arc

I'm building a QBR for [Account]. Here's their quarter: usage data, wins, escalations, and roster. Don't give me slides. Give me the 3-act story: where they started the quarter, what changed, and where they're heading. Identify the one insight that will make the CFO in the room lean forward.

WHY I USE THIS

QBRs that are just data dumps get forgotten. QBRs with a narrative arc get quoted back to me in renewal conversations. Story beats spreadsheets every time.

PROMPT 05.2

Risk + Expansion Paired Map

For [Account]'s upcoming QBR, identify 5 specific risks and 5 expansion hypotheses. For each one, tie it to a specific stakeholder who owns it on their side, a specific data point that supports it, and a specific slide idea. No generic "adoption risk" filler — I want risks I can point at.

WHY I USE THIS

The pairing matters. Every risk is an expansion opportunity in reverse, and putting them on the same page forces me to see the account as a system rather than a problem list.

DATA TO BRING

The quality of the output is the quality of the context you load.

- Full quarter of usage data and health scores
- Last QBR deck for continuity
- Stakeholder roster with seniority
- Support ticket history and key wins

PROMPT 05.3

The Stakeholder Persona Pass

Here's my draft QBR deck and the attendee list with roles. Go slide by slide and tell me which attendee will care most about each slide, which attendee will tune out, and which slide will cause the economic buyer to ask a question I'm not ready for. Rewrite any slide that's invisible to the economic buyer.

WHY I USE THIS

I used to build one QBR for the audience in the room. Now I build one that speaks to the economic buyer first and everyone else second. It changed my renewal rate.

PROMPT 05.4

Creative QBR Formats

Give me 3 unconventional QBR formats for [Account] — not the standard slide deck. One should be optimized for a short attention span, one for a technical audience, one for an exec who'd rather have a conversation than a presentation. For each, tell me what I gain and what I give up.

WHY I USE THIS

The format is the message. A 45-slide deck says we're a vendor. A 6-slide visual walkthrough says we're a partner. Picking the right format is half the strategy.

Renewal & Expansion

The renewal is decided 90 days before the conversation. These prompts ensure you're ready.

PROMPT 06.1

The 90-Day Renewal Pre-Mortem

The renewal for [Account] is 90 days out. Based on the attached history, tell me: what would cause this to be a downgrade, what would cause it to be a flat renewal, what would cause it to be an expansion. For each scenario, give me the leading indicator I should watch for in the next 30 days and the action I should take if I see it.

WHY I USE THIS

Pre-mortems are the single most valuable prompt in this book. They force me to imagine the account going badly before it does — the only way to catch it in time to matter.

PROMPT 06.2

Expansion Opportunity Scan

Scan all my communications with [Account] over the last 12 months. Find every moment where they mentioned wanting to do more of something, expand to another team, solve an adjacent problem, or complained about a workaround. Turn each into a specific, dated expansion opportunity with the stakeholder who raised it and the hook I'd use to reopen the conversation.

WHY I USE THIS

Expansion signals are scattered across 60 touchpoints and I forget them within a week. This prompt builds me a pipeline out of conversations I'd otherwise lose to the noise.

DATA TO BRING

The quality of the output is the quality of the context you load.

- Subscription and contract details
- 12-month usage trend data
- Full communication history
- Stakeholder map and champion status
- Any competitive mentions in notes

PROMPT 06.3

The Renewal Checklist with Teeth

Build me a renewal prep checklist for [Account] that goes beyond the basics. Include: contract terms I need to renegotiate, usage trends that support or threaten the renewal, stakeholder coverage gaps, competitive exposure, and the 3 questions I should absolutely not walk into the renewal call without having answered internally first.

WHY I USE THIS

Generic checklists are theater. This gives me a checklist specific to this account's actual risk profile — the only kind that protects me at the table.

PROMPT 06.4

Objection Pre-Rehearsal

Based on everything I know about [Account] — their usage, their mood, their competitive environment — give me the 5 hardest objections they're likely to raise at renewal. For each one, give me the strongest version of their argument, then give me my response in 2 sentences. Don't soften the objection. I need to rehearse against the real version.

WHY I USE THIS

I never lose the objections I prepared for. I lose the ones I didn't see coming. This is the fire drill I run 2 weeks before every renewal.

Retro & Continuous Improvement

Turn your own work into a feedback loop — and compound what's working.

PROMPT 07.1

The Weekly Self-Debrief

Here's my calendar, my top 3 calls, and what I said I was going to do this week. Tell me: what did I actually do well, what did I avoid, and what pattern do you see in what I avoided? Be direct — I don't want encouragement, I want the pattern.

WHY I USE THIS

I ask for direct feedback because polite feedback doesn't change behavior. The patterns I avoid are the ones where I'm losing accounts — and I need to see them clearly.

PROMPT 07.2

Win/Loss Pattern Recognition

Here's a recent win and a recent loss from my portfolio. Treat them as a paired case study. What did I do in the win that I didn't do in the loss? What did I do in the loss that I didn't do in the win? What's the one habit I should copy from the win into the rest of my portfolio this week?

WHY I USE THIS

Wins and losses are useless in isolation. Paired, they're the fastest way to find my own repeatable patterns — and my own blind spots.

DATA TO BRING

The quality of the output is the quality of the context you load.

- Last 30 days of your own calendar and call logs
- A recent win and a recent loss
- Your written follow-ups and emails
- Any team feedback or manager 1:1 notes

PROMPT 07.3

The Email Audit

Here are 5 follow-up emails I sent this week. Audit them for: hedging language, buried leads, passive voice, and any sentence that exists because I was uncomfortable saying what I actually meant. Show me the original and the rewrite side by side for the worst 3.

WHY I USE THIS

Writing is thinking. If my emails are soft, my strategy is soft. This is the cheapest writing coach I have and it holds up a mirror I'd rather not look in.

PROMPT 07.4

Skill Gap Scan

Based on the last 30 days of my work — calls, emails, escalations, wins, losses — what's the one skill gap I should invest in this month that would most change my outcomes? Don't give me 3 options. Give me the single highest-leverage one and tell me why you picked it over the others.

WHY I USE THIS

I don't need a development plan with 12 items I'll never touch. I need the one thing I should get better at this month. Forcing the model to pick one is the whole point.

ABOUT THE AUTHOR

Written from inside the work.

I'm a Senior Strategic Enterprise CS Director and the Lead AI Agent for my team at Global Payments. Before that, I spent nearly eight years in PropTech. I run a 24-account enterprise portfolio and I'm leading a company-wide AI adoption initiative because I believe the future of Customer Success is practitioners who can wield AI — not get replaced by it.

I write about what I'm learning in public because the CS-and-AI conversation right now is dominated by vendors and executives, and the enterprise practitioner point of view is missing. If that's the conversation you want to be part of, come find me.

This book is free. If it saved you an hour, pay me back by telling one person who should read it.

FIND ME

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