GAME IS SERIOUS
MANAGER FIELD GUIDE · DEAL IQ

MANAGER FIELD GUIDE · DEAL IQ · CSM · EXPAND/RENEW · GAME IS SERIOUS

Renewal and expansion playbook: practice CSM conversations first

Inherited packs, gap audits, and defensible expand or renew decisions for Customer Success

CSM enablement collapses when post-sale work is forced through AE discovery scripts. Deal IQ CSM track skips territory and live buyer board play. The win is a defensible expand or renew call with named documentation gaps, not a new logo.

ORIENTATION

Quick scan

WHO THIS IS FOR

- Customer Success managers coaching expand and renew calls
- Enablement leads running GISCSQ (Quorum) or CSIQ (NovaTech) post-sale cohorts
- Hiring managers assessing CSM through Strategic CSM with HIRECS

WHAT THIS IS NOT

- Not a CSM certification programme
- Not AE MEDDPICC live play (terminus is expand/renew, not closed-won)
- Not the game rulebook (see link for Alex, Klara, and turn mechanics)

CSM journey contract

Join GISCSQ for GIS Quorum expand/renew practice-now, CSIQ for the NovaTech inherited pack, CSLIVE for CS Live, or HIRECS for recruitment. The journey ends at a defensible expand, renew, or hold call. Active spine: Account Research, Initiative Mapping, Qualification. Manager preview labels: Inherited deal pack, Gap audit, Expansion map, Expand/renew call.

1. **Inherited deal pack:** Closed-won Phase 1 pilot logged. AE documentation is thin: economic buyer path incomplete, decision criteria not transferred, champion test evidence missing.
2. **Gap audit:** Flag true documentation gaps mixed with distractors. At least one gap (selected or authored) before locking the call.
3. **Expansion map:** Map inventory whitespace adjacent to the closed checkout pilot. Cite health and QBR evidence before pitching expand.
4. **Expand/renew call:** Lock Expand, Renew, or Hold. Scoring grades call correctness plus gap coverage against the authored answer key.

Manager tip: A strong renew beats a weak expand when the economic buyer intro is still missing. Do not coach reps to chase whitespace before gaps are named.

Known documentation gaps

- **Economic buyer path:** Economic buyer (Samira Patel) not introduced; no TCO pack attached.
- **Decision criteria transfer:** Decision criteria weights from Kenji Park not documented for CSM.

- **Champion test:** Champion test (Weber co-own pilot / intro path) not sealed.
- **Commercial envelope:** Commercial envelope / paper path for renew not attached (pilot envelope only).
- **Renew trap vs ticket theater:** Renew trap vs LMS Completions theater not documented for CSM.

Distractors (not true gaps)

- Executive sponsor already introduced CFO on a recorded TCO walkthrough
- Champion test sealed with co-owned pilot success criteria
- Renewal commercial terms locked with legal redlines complete
- Adoption dashboard proves inventory promise engine fully live
- Paper process and MSA renewal path fully transferred to CSM
- Competitive displacement plan documented against batch inventory vendor

Level coaching

- **L1:** Inherited-pack audit, name AE documentation gaps, defend renew or cautious hold. *Audit the inherited SwiftLane pack, flag documentation gaps, defend renew or hold until gaps are named.*
- **L2:** Adoption evidence plus renewal business case against thin AE handoff. *Validate adoption evidence from health and QBR, repair economic buyer intro gap, defend expand or renew with TCO story.*
- **L3:** Multi-stakeholder expand/save with Park architecture bar and Patel TCO gate. *Map inventory whitespace with Park and Patel context, defend expand or save call under renew pressure.*

How overall score is blended

Overall score blends expand/renew defensibility (50%), MEDDPICC element average (30%), and gap coverage (20%). Managers inspect gaps detected and gaps missed before celebrating a green call.

Tier	Score	Signal
right_strong	95	Correct call and all expected documentation gaps detected.
right_lucky	70	Correct call, but documentation gaps remain.
wrong_call	35	Call does not match the authored answer key.
no_call	20	No expand, renew, or hold call recorded.

Manager tip: Inspect gapsDetected and gapsMissed before celebrating a green call. A right call with open handoff holes still means work remains.

Klara on the CSM desk

Training:

- No gaps flagged: read the AE handoff stub first; flag gaps independently before locking expand or renew.
- No call selected: select expand, renew, or hold. A strong renew beats a weak expand when the CFO intro is still missing.
- L2 + expand: cite health and QBR before expand. Low tickets alone do not prove inventory health.
- L3: seal champion test gap and map Park criteria before Patel TCO. Hold if intro path is still thin.

Recruit: Under HIRECS (sessionPurpose=recruit), Klara is a silent evaluator. No desk tips, no training scaffolds, no learning-path proposals. Assessment starts after the unscored briefing beat.

HIRECS bands

Band	Minutes	Gates
csm	30	critical risk identified
senior_csm	45	critical risk identified · defensible renewal or expansion call
strategic_csm	60	critical risk identified · defensible renewal or expansion call · executive alignment

What managers see after a run

The public CSIQ sample debrief shows fellowship step scores, expand/renew defensibility (player call, correct call, gaps detected, gaps missed, judgment band, rationale), MEDDPICC element scores, deal outcome factors, key decisions, tips, and behavior profile. RCC queues the same schema.

- Expand/renew hero block: call, judgment band, score, rationale
- Gap audit accuracy and whitespace mapped factors
- MEDDPICC board scores with assessments per element
- Stakeholder beats tied to inherited pack and expand defense

Pilot agenda

0–5	**Frame**	Confirm GISCSQ, CSIQ, CSLIVE, or HIRECS track. State win condition: defensible expand or renew, not a new logo.

5–20	**Inherited pack**	Reps open land CRM, AE handoff, adoption report, health, QBR, renew vs expand CRM, and inventory whitespace.
20–40	**Gap audit + map**	Flag true gaps vs distractors. Map whitespace only after gaps are named.
40–55	**Call + debrief**	Lock expand/renew/hold. Review tier, gapsMissed, and element scores.
55–70	**Manager plan**	Assign one gap type per CSM for next live renew review. Queue HIRECS if hiring.

Debrief worksheet (per CSM)

CSM	Call	Tier	Gaps missed	Next live ask

FAQ

Is CSM a different Deal IQ product?
No. Same Deal IQ engine, different doors. CS practice, the inherited-account sample, live CS, and CS hiring are not the AE live-buyer door.

Does CSM see the AE live buyer board?
No. The journey contract ends at expand/renew. Live MEDDPICC play remains AE-only (SDEALQ).

How is expand versus renew scored?
Call correctness and gap coverage are graded into four manager bands: strong judgment, right call with gaps remaining, wrong call, or no call recorded. Overall score blends defensibility 50%, element average 30%, gap coverage 20%.

What is the authored correct call on CSIQ?
Expand into the inventory promise engine whitespace, with all five documentation gaps named. Renew-only leaves the golden inventory node on the table while SwiftLane is live.

How is HIRECS different from CSIQ?
Same track and level, sessionPurpose=recruit. Klara stays silent. Bands are csm, senior_csm, and strategic_csm with time boxes and mustPassGates. A human reviewer interprets evidence; the

assessment does not make an autonomous hire decision.

How does this relate to the SPICED and MEDDPICC guides?
SPICED covers SDR / BDR SQL handoff readiness (what a clean upstream pack looks like). MEDDPICC covers AE fellowship through live play. This guide covers the post-sale seat that inherits the pack and defends expand or renew.

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For game mechanics see deal-iq-rulebook.html · For live pilots: hello@gameisserious.com