Vitally

The Customer Success AI Prompt Book

r a Follow-Up Email

Customer analysis

Call prep

QBR pre

Renewal management & upsells

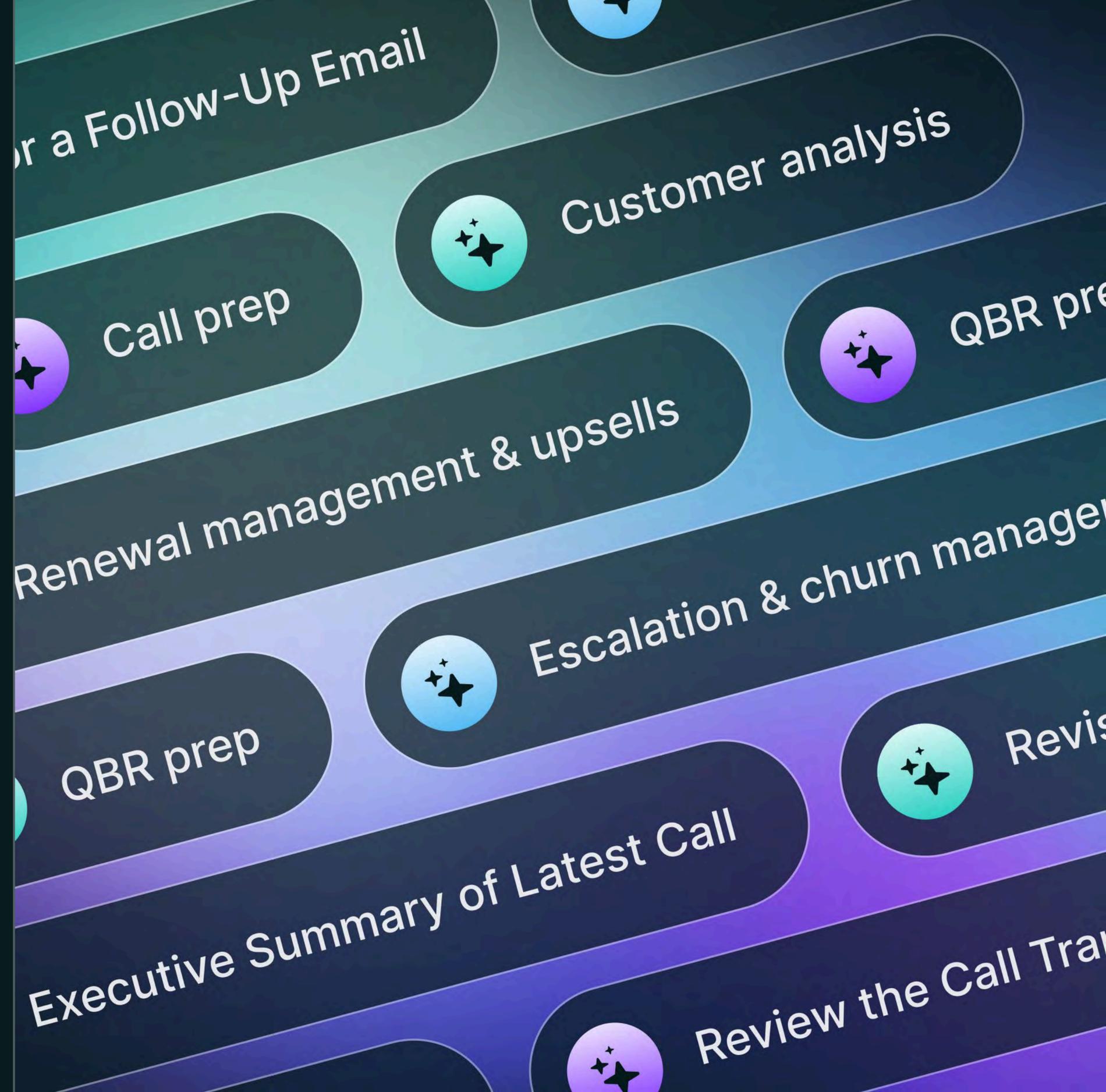Escalation & churn manage

QBR prep

Revis

Executive Summary of Latest Call

Review the Call Tra

We've collected prompts from our team and across the web to bring you a complete "prompt cookbook" to help automate some of your work as a CSM.

We've broken them out by category so you can quickly scan through based on your situation:

Flip through the pages of this eBook and note down and share your favorite prompts with your team.

Ask a question

Review the call transcript with a customer

Escalations & Churn Management

Review the following customer support tickets and responses. Please identify any escalation risks you see. What would you recommend as the next steps?

Please help me draft an objection-handling script for a customer who is concerned about the cost of our premium subscription plan. They are comparing our offering to a cheaper competitor.

Identify recurring concerns or issues raised by the client over the past six months based on their interactions, including meetings, emails, support tickets, and related notes. Provide concise and impactful bullet points with numbers. Highlight any concerns that have not been adequately addressed or resolved.

Review this customer's usage data from the past 90 days. Identify any customers who may be at risk of churning due to usage drops, reduced login frequency, or support interactions. Summarize the findings in a table with columns: Customer Name | Risk Factor | Notes.

Data Requirements

When using these prompts, it is helpful to provide relevant data like:

Call transcripts

Copies of support tickets and exchanges

Communication history between you and the customer

Renewal Management

Meeting Follow-Up

Review the call transcript with a customer, along with our communications history. Please then define the immediate next steps and tasks that I should take.

> It helps if you align a goal with this, for example:
> To prepare for their upcoming renewal

Please give me an executive summary of the latest call with the customer. Date and time of call: Who were the attendees, topics, and what were the next steps? Provide this in a shareable format for distribution across my team.

Please review the following draft for a follow-up email to a customer. I've included the call transcript. Please tighten/revise my email as needed to align with the next steps defined on the call.

Data Requirements

When using these prompts, it is helpful to provide relevant data like:

Call transcripts

Copies of support tickets and exchanges

Product usage data

Customer Analysis

Data Requirements

The following CSV files document customer usage of our product. Please identify usage patterns and any subsequent overages. Call out the risks of customer drop-off or opportunities for upselling.

Review this CSAT survey data from Q2. Calculate overall average, identify outlier scores, and summarize feedback themes if available. Output as a short summary with key stats and top positive/negative feedback examples.

Craft a set of 10 survey questions aimed at understanding our customers' experience with our platform. Ensure the questions are open-ended, encourage detailed feedback, and cover aspects such as the user interface, ease of navigation, and responsiveness of customer support.

Examine this export of support tickets from the last quarter. Identify the top five recurring issues and provide a short summary of root causes. The output should include a ranked list of issues, their frequencies, and potential CS actions.

When using these prompts, it is helpful to provide relevant data like:

Call transcripts

Product usage data

Support ticket data

CSAT and survey data

Communication history between you and the customer

Call Prep

Here is the communication history, product usage, and renewal date for a customer. Please review it and give me 5 talking points for our upcoming call.

> Bonus points if you frame this around a specific task, like renewal, contract evaluation, or escalation.

Please highlight any small talk we discussed with this customer (hobbies, interests, vacations, etc.) Please highlight any standout quotes from the team over the past month and provide ways to weave them into a conversation.

I have a call with a customer today to review our latest product updates so they can educate their team. Please review the following product and release notes and provide me with a condensed summary to share.

Please generate a customer meeting agenda based on the activity, Slack messages, emails, activity logs, all other open issues, product usage analytics, and previous meeting notes from the last 30 days.

Please return a list of upsell opportunities for the customer. This should be a list of products or services that the customer has expressed interest in. Highlight whether customers have ever asked about adding seats or shared plans to scale their team.

Data Requirements

When using these prompts, it is helpful to provide relevant data like:

Past call transcripts

Product usage data

Communication history between you and the customer

QBR Prep

Data Requirements

I have an upcoming Quarterly Business Review (QBR) with our clients. On the call will be [List the roles]. Here are the usage, support, and renewal dates. Identify 5 specific risks and 5 expansion hypotheses. Tie each to a stakeholder persona and suggest 1 slide idea per point.

Generate a list of three creative ideas to enhance our upcoming Quarterly Business Review (QBR) with our clients. Please provide ideas that are engaging, reflect our innovative approach, and are likely to encourage a deeper discussion on strategy and future collaboration.

Summarize the top wins, risks, and product usage highlights for my customer ahead of our Quarterly Business Review (QBR). Use their latest health score, usage trends, and support ticket history. Format as a bulleted prep doc for internal review.

When using these prompts, it is helpful to provide relevant data like:

Call transcripts

Copies of support tickets and exchanges

Communication history between you and the customer

Product usage data

Win

Stakeholder information (names, seniority)

Subscription and revenue data

Renewal Management & Upsells

Create a renewal call prep checklist for my customer. Include contract terms, current usage, known risks, and upsell potential. Output as a bulleted checklist.

Craft a proposal for an upsell opportunity to existing customers, offering them our newly launched add-on. Describe the benefits and how this module complements their existing digital marketing services with us. The proposal should be persuasive, highlighting the additional value they'll gain with this module.

Construct a template to capture customer case studies. Our goal is to showcase the benefits and results our clients have achieved with our software. The template should include sections for Company Background, Challenges Faced, Solutions Provided, and Results Achieved, as well as a client testimonials section.

Please find every direct business opportunity discussed with the customer for its own use (upsell, upgrade, additional seats, cross-sell, contract renewal, budget forecasts, or internal budget request). You have to rely solely on customer conversations and notes.

Data Requirements

When using these prompts, it is helpful to provide relevant data like:

Subscription and revenue data

Product usage data

Communication history between you and the customer

Are There AI Tools Beyond ChatGPT & Claude for CS Teams?

ChatGPT and Claude are a great starting point, but they have their limits. For one, these tools require you to copy and paste all relevant customer, product, and revenue data into them, which can work if you are just getting started, but it's difficult to do at scale.

Fortunately, we've got an AI-powered Customer Success Platform to recommend: Vitally. Vitally stands out among other Customer Success software thanks to its emphasis on ease of use and speed, without sacrificing power. With Vitally, you can bring all of the relevant data we mentioned above:

Call recordings

Support tickets

Revenue data

Product usage

And teams can automate meeting follow-up, tasks, notes, and so much more. Savvy CS teams get more done with Vitally. Schedule a demo

Acme Inc. Renewal Meeting

Account — Acme Inc.
$24K • Renews 2024-02-20

Date & time — Thursday Feb 6, 5:30 PM - 6:00 PM

Conferencing — Meeting link

Participants
✓ Alice Lee — Organizer
✓ Hector Rey
✓ Anna Lehmann

✦ What are the main takeaways?

Based on the information in this note:

- There is an unlimited seats plan upsell opportunity.
- The customer still needs training on the product and its benefits.

for us to discuss how is going with the product in your upcoming renewal in is also time to explore any ues or other ways we can ur experience.

Meet The AI-Powered Workspace for CSMs

Vitally AI is purpose-built AI for Customer Success — helping teams reduce churn, unlock growth, and stay a step ahead.

Because Vitally AI lives inside your CS platform, it understands the full picture. From your customer's health and history, product usage data, and business goals, Vitally AI ensures every insight is grounded in context that generic AI tools simply don't have.

AI Summaries
Create custom prompts to surface risks, sentiment, opportunities and anything else you need to know, all from your real-time customer data.
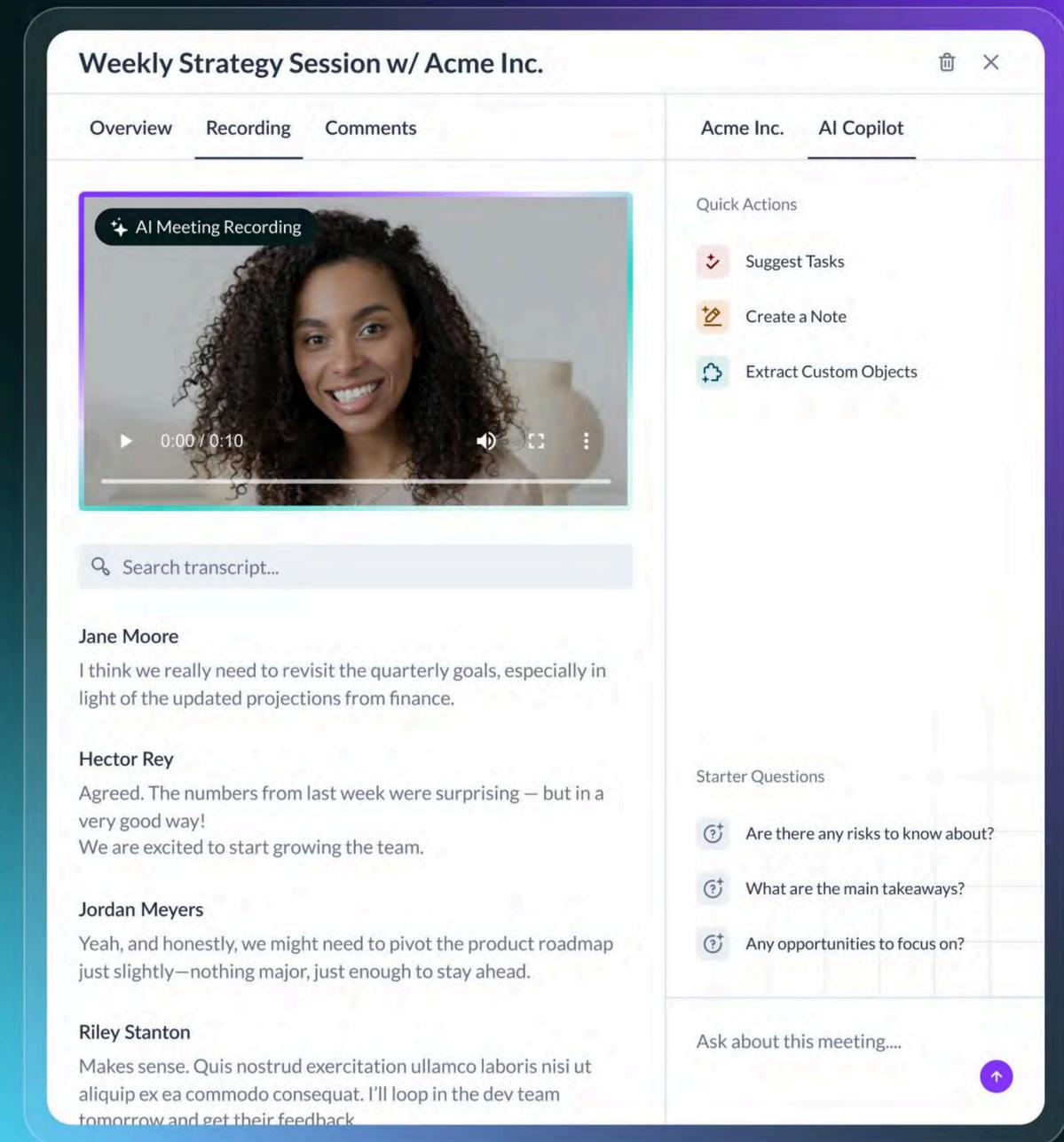
AI Actions
Auto-generate follow-up emails, tasks, notes, custom objects and more with one click.

Ask AI
Ask freeform questions about any account to instantly understand what is happening and what action to take next.

AI Meeting Recorder
Automatically capture every call to unlock richer, real-time AI insights.

Weekly Strategy Session w/ Acme Inc.

Overview   Recording   Comments

Acme Inc.   AI Copilot

✦ AI Meeting Recording

0:00 / 0:10

Search transcript...

Jane Moore
I think we really need to revisit the quarterly goals, especially in light of the updated projections from finance.

Hector Rey
Agreed. The numbers from last week were surprising — but in a very good way!
We are excited to start growing the team.

Jordan Meyers
Yeah, and honestly, we might need to pivot the product roadmap just slightly—nothing major, just enough to stay ahead.

Riley Stanton
Makes sense. Quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. I'll loop in the dev team tomorrow and get their feedback.

Quick Actions

Suggest Tasks

Create a Note

Extract Custom Objects

Starter Questions

Are there any risks to know about?

What are the main takeaways?

Any opportunities to focus on?

Ask about this meeting....

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Vitally helps Customer Success teams of every size succeed and evolve through the success of their customers. Our top-rated Customer Success Platform provides CS teams with everything they need to deliver world-class customer experiences, operate more efficiently, and grow their business's bottom line. The fastest-growing B2B SaaS companies use Vitally to proactively address churn risks and expansion opportunities in real-time.

Visit vitally.io/demo-request to schedule a personal demo and see why more industry leaders are switching to Vitally.