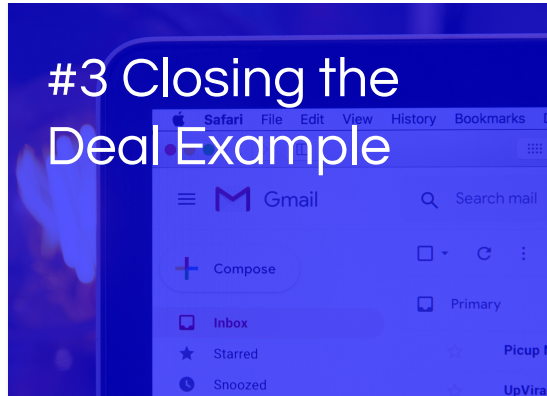
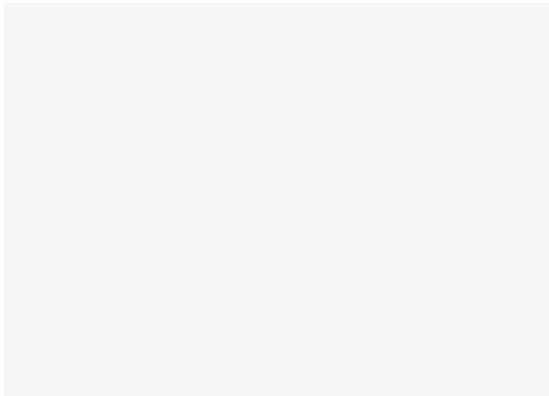
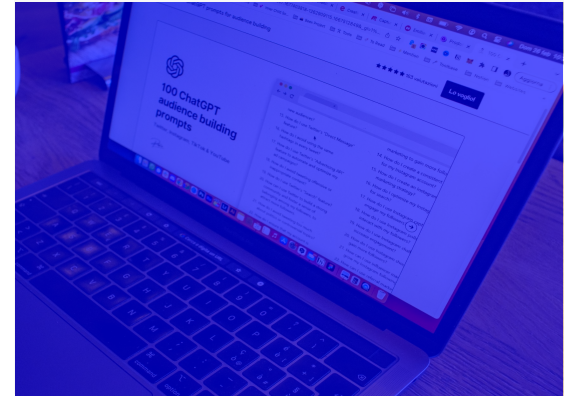
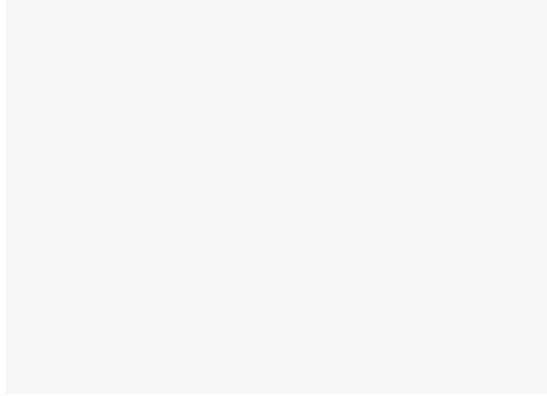


# Good/Great Prompt Examples



The AE is looking to set up a new client for success with implementation experts or customer success manager.

# Closing the Deal Example

## When smaller prompts are more effective

This example is great at showing why several smaller prompts can be more effective than one mega prompt.

Here we break down the tasks we want Claude to do into easy steps like we might for a new intern.

We don't want too many variables and confusion to set in. It is also much harder to fix issues with the prompts when they are very big.



# Close the Deal Example

## Good Prompt

I'm an AE that has recently closed a deal. What would be important points to transfer over to our customer success department. The goal is to ensure our new customer never feels a drop in communication as they transfer from prospect to customer.

## Good Response

Here are some important points to transfer to the customer success team when onboarding a new customer:

- Introduce the key customer success manager who will be the main point of contact. Make sure to provide their contact information.

- Share any key insights about the customer's business, priorities, pain points, etc. that were learned during the sales process. This context will help the CSM better serve the customer.
- Provide details on the deal - what product(s)/service(s) were purchased, contract length, pricing, etc.
- Share any promised deliverables or milestones discussed during sales negotiations. The CSM can help ensure these are met.
- Transfer over any notes, emails, or other sales collateral that provide background on the customer relationship.
- Inform the CSM of any open follow-ups or action items for the customer that sales committed to.
- Give heads up on any potential upsell opportunities that sales identified to pass on to the CSM.

## Good Response Cont.

- Introduce the customer to the CSM via email to warmly hand off the relationship.
- Set up a joint call with sales, the CSM, and the customer for a formal introductions.
- Provide the CSM access to any shared sales documents or tools (CRM, project tracker, etc) to maintain continuity.

The key is keeping the customer informed and setting clear expectations as they transition from sales to customer success management.



# Close the Deal Example

## Great Prompt

Act as an account executive in the sales department that just closed a deal. You are talented at writing emails to the client in order to ensure the client always feels confident, secure, and knowledgeable about the next steps. Based on the transcripts provided, what would be important points to transfer over to our customer success department or the implementation expert?

*\*\*Using Claude, you can share your transcripts or call notes for context to help focus the chatbot.\*\**

## Great Response

Here are some key points I would highlight to the customer success team based on the provided transcripts:

- Tom is the main contact at Push/Pull. Make sure he remains the point person for ongoing communication.
- They currently have 50 SDRs but want to double that this year, so ramping quickly is a priority for them.
- Training, customized pitches, and call analytics stood out as valuable parts of our offering for Tom. Ensure he sees those benefits.
- Push/Pull's main goals are increasing SDR rep ramp speed, pipeline generation, and building a successful outbound program. Track progress on those goals and proactively communicate it.

# Close the Deal Example

## Great Response Cont.

- Tom seemed interested in client references who have seen good results. We could connect him with relevant references as a value-add.
- Make sure to deliver on the specifics promised, like 2 weeks of onboarding training and real-time call analytics. Follow through is key.
- Tom appreciated the proposal we put together for him. Maintain that diligence and professionalism as an engaged partner.
- Find opportunities to provide additional helpful resources, as I did in the email with eBooks, templates, and tips.

Keeping Tom looped in on progress, results, and next steps will be key to ensuring a smooth transition from sales to ongoing customer success

## Follow-Up Prompt 1

Help me write an internal email to our customer success team that highlights these points and ensures the handoff is professional.

## Great Response

Here is a draft email you could send to the customer success team highlighting the key points for a smooth transition:

Subject: Push/Pull Customer Transition

Hi Customer Success Team,

I'm reaching out to provide context as we transition our new client, Push/Pull, from sales to onboarding and ongoing success management.

# Close the Deal Example

## Great Response Cont.

Push/Pull signed on for our Outbound Accelerator program. The key contact is Tom, who seemed particularly interested in ramping up their SDR team quickly. They currently have 50 reps but want to double that this year, so rapid training and ramping speed are priorities for them.

Tom was interested in our training curriculum, customized pitches, and real-time call analytics. Please make sure he sees those benefits come to life. Their main goals are increased SDR rep ramping, more pipeline generation, and building a successful outbound program overall - so tracking progress on those KPIs will be important.

Tom appreciated the proposal we created and our professionalism throughout the sales process. Please maintain that level of engagement and diligence as his main

point of contact for anything needed. Providing relevant resources, references, and updates proactively will go a long way.

Please let me know if any other context would be helpful for ensuring Tom has a smooth transition to Customer Success. I want to set him up for a great experience with our team and product. Let's make sure he never feels a drop in communication throughout onboarding and beyond.

Thanks, [Your name]

## Follow-Up Prompt 2

Now help me write an external email that introduces Tom to his new customer success manager and ensures him that his priorities will be met.

# Close the Deal Example

## Great Response

Subject: Introducing your Customer Success Manager

Hi Tom,

I wanted to thank you again for choosing our Outbound Accelerator program for Push/Pull's sales development needs. I'm very excited that we'll be partnering together.

As we discussed, increasing your SDR team size quickly is a top priority. So I'm pleased to introduce you to John, who will be your dedicated Customer Success Manager.

John has a strong background in scaling sales teams and ensuring rapid rep ramping. He will make sure your onboarding experience focuses on getting your reps up and running as fast as possible.

Together, you and John will track progress on key goals like month-over-month SDR ramping, pipeline generation, and overall outbound program success. He will keep you looped in on progress every step of the way.

John will also ensure you see maximum value from aspects like our training curriculum, customized pitch decks, and real-time call analytics. Utilizing these fully will be critical for supporting your growth goals.

Please don't hesitate to reach out to John directly at [john@company.com](mailto:john@company.com) if you need anything at all. We are committed to delivering an incredible onboarding experience and ongoing partnership.

Looking forward to seeing the great success we can achieve together!

Best, [Your name]