

First In

Plays for the first customer success hire at a startup

Free sample: 3 complete plays. From Draft First. Written by a customer success and support lead.

Welcome

You're the first customer success hire. Maybe your title says CSM, maybe Head of Customer Success, maybe something vaguer. There's no playbook, no CS software, and the founders still answer half the customer emails. Within a few weeks you'll also be asked to handle support, chase invoices, answer a security questionnaire and run onboarding, because you're the person who talks to customers and nobody else owns those things.

The advice you'll find for this moment is mostly true and mostly general: listen first, get quick wins, build process. What it doesn't tell you is what to do on the day a founder replies to your customer over your head, or how to say no to the fifth extra job without sounding like you're not a team player, or which five columns to put in the spreadsheet so you don't end up with forty.

This book is 24 plays for those moments. Each one starts with a situation you'll recognize, then gives you the move, the words to say, decision rules for the judgment calls, a template, the mistakes to watch for, a short made-up example of how it plays out, and a walk-away line: the point where the play has done its job and you should stop, hand off or switch.

This free sample has three complete plays: writing your scope down, the five columns that matter, and the founder who keeps replying to your customers. They're exactly as they appear in the full book.

The full playbook has 24 plays

Chapter 1. Your first month

1. The listening tour, 2. The lost-account file, 3. Pick one problem, 4. Write your scope down

Chapter 2. The minimum system

5. Spreadsheet before software, 6. The five columns that matter, 7. A first health signal, not a score, 8. Segment by need, not just size

Chapter 3. Taking over from founders and sales

9. Founder handoff of their accounts, 10. Sales handoff starter, 11. What did we promise?, 12. The founder who keeps replying

Chapter 4. Your first repeatable processes

13. First onboarding checklist, 14. Your first renewal calendar, 15. Your first check-in rhythm, 16. Your first customer feedback loop, 17. Your first help content

Chapter 5. Reporting and protecting the role

18. The monthly CS note to founders, 19. Show retention honestly, 20. Ask for your second hire, 21. Saying no to founders, 22. Security questionnaires with no security team, 23. Your first escalation path, 24. Your 90-day story

The full First In playbook has all 24 plays, the Find your situation page, a page for telling similar situations apart, a first-90-days map, a templates index and a standing rules block for your AI assistant. Find it at draftfirstcs.com.

Write your scope down

Nobody intends to make the first CS hire do everything. It happens one reasonable request at a time: "can you just answer this support ticket", "can you chase this invoice", "can you fill in this security form". Three months in, you're support, billing, sales ops and QA, and CS work happens in the gaps. A written scope, agreed with the founders, is what lets you say "that's not mine" without it sounding personal.

YOU'RE HERE IF You're doing work nobody agreed was yours. You can't remember when you took on support or billing. CS work keeps getting pushed to evenings.

WHEN In your first month, ideally before the extra jobs pile up. If they already have, now.

The move

1. List everything you've been asked to do or have started doing, including the small things.
2. Sort it into three groups: clearly CS, CS for now but should move, and not CS.
3. Write a one-page scope: what you own, what you're covering temporarily (with an end date or condition), and what isn't yours, with who owns it instead.
4. Review it with the founders. Ask for a clear yes or corrections, then share it with anyone who sends you work.
5. Use it every time a new request arrives (play 21).

Say it like this

WEAK ASK (DON'T OPEN THIS WAY)

"I'm a bit overloaded and wondered if we could talk about my role at some point?" It invites sympathy, names nothing, and sets no date.

OPENING WITH THE FOUNDERS

I want to make sure I'm spending my time on what you hired me for. Here's everything I'm doing right now, sorted into what's clearly CS, what I'm covering for now, and what I think belongs somewhere else. Can we agree this, so I can point to it when new things come up?

NAMING A TEMPORARY COVER

I can cover support until [date], for [time] each week, while [task] waits. At that date, who takes it over or what else stops? Can we confirm that?

WHEN ASKED TO DO SOMETHING OUTSIDE SCOPE

That's outside what we agreed I'd cover. I can do it, but something else will slip. Which would you rather?

Decision rules

- If scope stays unconfirmed, ask founders to choose priorities before the next customer deadline. Without a decision, flag what may slip. Follow company policy on role questions.
- If something has no owner at all, it's fine to cover it temporarily, but write down the end condition.
- If your scope differs from your job description or offer letter, raise it with the founders and follow company policy. This book doesn't advise on employment terms.
- If a request is legal, contractual or security-related, it isn't yours to own alone, even if it lands with you. Route it to the right person.

Watch for

- Writing it after you're already overwhelmed and resentful. It comes across as a complaint.
- Making it so narrow you look unhelpful. Covering things temporarily is fine.
- Never revisiting it. Startups change fast.

Template: Scope agreement one-pager

Role: [title] Agreed with: [founders] Date: []

I own:

- [onboarding] [renewals] [check-ins] [CS feedback to product]

I'm covering temporarily (until [condition or date]):

- [support tickets until ...]

Not mine (owner instead):

- [billing collections: finance or founder]
- [security questionnaires: technical founder]
- [contract terms: founder]

When something new arrives: I'll say what drops if I take it.

Review: [end of quarter]

The usual advice: Agree a job description.

What this play does instead: Write three lists (mine, covering until a date, not mine) and ask for a yes on the page, not a conversation.

Judgement call. Keep covering a task nobody else can do, or drop it to force a decision? My test: keep it only with an end date on the page, and never drop something customers depend on without telling the founders first.

Starting defaults: Three lists on one page; every covering task gets an end date within 90 days. Ninety days, so a temporary task can't quietly become permanent.

How it played out. Made-up example: Noor wrote her scope only after a month of covering invoices, and the first version read like a complaint. One founder got defensive. She rewrote it as three neutral lists, put invoicing under "covering until the finance contractor goes full time", and asked for a yes. Three months later she handed invoicing over, with the page as the reason.

Walk away when: When the scope is confirmed and shared with the people who send you work, stop. Bring it back out when a new request arrives (play 21) and review it each quarter. If it stalls: If you still have no answer after the deadline you named, treat your written version as your working plan, tell the founders that in one line, and log each new request against it.

Check it worked: A month after the yes: count requests that landed outside your lists. Starting default: more than three a month means the page needs another pass with the founders.

Company policy first: Your role, title, hours and job description are employment matters. If the scope you agree differs from your offer or contract, raise it with the founders and follow company policy. This play gives no HR or legal advice.

Agent draft prompt

Drafts only. Follow company data policy before sharing notes, contracts or exports; removing names alone is not enough.

Here's a list of everything I've been doing or asked to do as the first CS hire, with who asked.
Sort it into: clearly CS | covering for now (suggest an end condition) | not CS (suggest the likely owner from the roles I list: [roles]).
Then draft a one-page scope agreement in plain words.
Rules: anything involving contracts, legal or security goes under "not CS" with "follow company policy".
Use only my list. Draft for me.

[paste list]

The five columns that matter

Account sheets grow. Someone adds industry, then employee count, then NPS, then a column for each feature. Soon there are forty columns, half empty, and nobody trusts any of it. A small sheet you actually update after every conversation is worth more than a big one you update once a quarter. Use five working columns plus account and owner; add another only when it would change a decision.

YOU'RE HERE IF Your sheet has more columns than you fill in. You can't see at a glance which renewals are coming and which are at risk. You avoid updating it because it takes too long.

WHEN When you set up the sheet in play 5, or when you clean up one that has sprawled.

The move

1. Use these columns: account, renewal date, annual value, owner, last real conversation (date and a few words), risk reason, next step with a date.
2. Define each one in a header note. "Last real conversation" means a two-way conversation with someone who uses or buys the product, not an automated email.
3. Fill it in for every account, even roughly. Mark unknowns as unknown rather than leaving them blank.
4. Update it right after every customer conversation. Sort by renewal date every Monday.
5. Before adding any new column, write down the moment it would have helped. If you can't name one, don't add it.

Say it like this

WHEN SOMEONE ASKS FOR A NEW COLUMN

Happy to add it if it changes what we'd do. Can you tell me a time in the last month it would have changed a decision? If so, it goes in.

A GOOD RISK REASON (MADE-UP)

Champion moved to a new team in March; new admin hasn't logged in since.

A WEAK RISK REASON

Low engagement.

Decision rules

- If the risk reason is blank, the account isn't "no risk". It's "don't know yet". Write that.
- If "last real conversation" is older than your check-in cadence for that tier (play 15), that's a risk reason by itself.
- If annual value isn't clear from contracts, ask finance or the founders and mark it [CONFIRM] until you know.
- Keep a separate tab for anything detailed, like contacts or notes. The main tab stays scannable.

Watch for

- Adding a column every time someone asks.
- Using "low engagement" or "at risk" without saying why.
- Letting next step go without a date. A next step with no date is a wish.

Template: Account sheet (CSV header)

```
account,renewal_date,annual_value,owner,last_real_conversation,risk_reason,next_step
```

Example row (made-up):

```
Calder Freight,2027-03-31,[value],You,"2026-10-02 call with ops lead, happy with reports","Champion leaving end of year","2026-10-20 ask for intro to successor"
```

The usual advice: Track everything you can about each account.

What this play does instead: Five working fields plus account and owner, and every field must change something you'd do on Monday.

Judgement call. Add a field a founder asks for? My test: add it if they can name the decision it changes; otherwise park it on a "maybe later" line under the header.

Starting defaults: Seven columns: account and owner, plus five working fields: renewal date, annual value, last real conversation, risk reason, next step. Each one changes what you do on Monday.

How it played out. Made-up example: Ines hid all but the seven columns, then a founder asked for an industry column "just in case". She added it, and it stayed empty. At the next cleanup she applied the test: when would it have changed a decision? Nobody could say, so it went. The Monday sort, not the extra column, found the two renewals with no recent conversation.

Walk away when: Stop designing the sheet when every account row is filled (even if some cells say unknown) and you've updated it after conversations for four weeks running. Add columns only through the "when would it have changed a decision" test. If it stalls: If a field stays unknown for most accounts after a month, stop pretending it's tracked: drop it or name who can fill it.

Check it worked: Every Monday: how many rows were updated in the last two weeks? Rows untouched for a month are accounts you've lost sight of; they go to the top of the week.

Company policy first: Contract fields like renewal date and value come from the contract owner's records under company policy. Store customer data only where your company allows.

Agent draft prompt

Drafts only. Follow company data policy before sharing notes, contracts or exports; removing names alone is not enough.

Here's an export of our customer accounts with many columns. Map it to these seven: account, renewal date, annual value, owner, last real conversation, risk reason, next step.
For each account, fill what you can from the export. Where a value is missing or unclear, write "unknown" and tag [CONFIRM]. List accounts with a renewal in the next [number] days and an empty last real conversation.
Use only the export. Draft for me.

[paste export, names as they appear or replaced]

PLAY 12 OF 24 | TAKING OVER FROM FOUNDERS AND SALES

The founder who keeps replying

You've done the handoff (play 9), and the founder still replies to your customers, sometimes before you've seen the email, sometimes promising things you didn't know about. They mean well. They're fast, they care, and the customer emailed them. But every reply teaches the customer that the founder is their real contact, and makes your job harder. A simple, agreed rule fixes this without a fight.

YOU'RE HERE IF	A founder replies to customer emails that should be yours. Customers copy the founder on everything. You find out about commitments from the customer.
WHEN	As soon as it happens more than once after a handoff.

The move

- 1. Collect a few recent examples, without judgment.
- 2. Raise it in a 1:1 with the founder. Start with the effect on the customer, not on you.
- 3. Propose a simple rule: when a customer emails the founder, the founder forwards it to you with a short note and doesn't reply. You reply, copying the founder when it matters.
- 4. Agree what "when it matters" means: for example, executive escalations, renewals or anything about pricing.
- 5. Agree what happens if the founder really wants to reply: they tell you first.

Say it like this

RAISING IT

Can I raise something about the Calder account? Last week they emailed you and you replied before I'd seen it, which is completely understandable. The trouble is, it tells them you're still their main contact, and it means I sometimes find out about commitments from them. Can we try a simple rule?

THE RULE

When a customer emails you, forward it to me with a line like "[Name] will pick this up" and don't reply yourself. I'll reply and copy you whenever it's about renewal, pricing or something serious. If you really want to reply, give me a heads-up first.

THE FOUNDER'S FORWARD TO THE CUSTOMER

Thanks for this. Copying [name], who'll pick it up and get back to you today.

Decision rules

- If the founder agrees and slips back, mention it lightly the first time and point to the rule. It takes a few weeks to change a habit.
- If the customer is senior and expects to hear from the founder, agree that the founder replies briefly and hands over in the same email.
- If the founder makes a commitment in a reply, ask them to loop you in on it the same day, and add it to the promise register (play 11).
- If it keeps happening and you've raised it twice calmly, it's about how the founders see the role. Raise it as a scope question (play 4).

Watch for

- Raising it as a complaint about the founder.
- Raising it in a group meeting.
- Expecting the habit to change after one conversation.

Template: The forwarding rule

When a customer emails a founder:

1. Founder forwards to [you] with: "[Name] will pick this up."
 2. Founder doesn't reply on substance.
 3. [You] reply within [time], copying the founder when it's about: renewal, pricing, executive escalation, [other].
 4. If the founder wants to reply: tell [you] first.
- Agreed on: [date] Check-in on how it's going: [date]

The usual advice: Ask the founder to stop replying to customers.

What this play does instead: Agree a forwarding rule in a 1:1, framed around the customer, and expect slips.

Judgement call. Raise a slip straight away or let small ones go? My test: let it go if the reply was right and you were copied; raise it if the customer got a promise you'll have to manage.

Starting defaults: Raise it once in a 1:1, then let one slip go if you were copied. A second slip with a customer promise gets raised the same day.

How it played out. Made-up example: Pia raised the replying issue in a team meeting, and the founder felt called out. She apologized and raised it again in a 1:1, focused on the customer, with the forwarding rule. The founder agreed, slipped once at 11pm the next week, laughed when Pia mentioned it lightly, and started forwarding.

Walk away when: Stop discussing it when the founder forwards rather than replies on most customer emails for a month and customers write to you first. If it stalls: If it continues after two calm conversations, it's no longer a habit question. Bring it to play 4 as a scope question with the customers affected.

Check it worked: After a month: count customer emails the founder replied to without forwarding. Fewer each week is success; the same number means it's a scope question (play 4).

Agent draft prompt

Drafts only. Follow company data policy before sharing notes, contracts or exports; removing names alone is not enough.

Help me prepare a calm 1:1 conversation with a founder who keeps replying to customers I now own.
Recent examples: [paste short descriptions, no names needed].
Draft: a two-sentence opening focused on the customer, a proposed forwarding rule in four steps, and a one-line forward the founder can use.
Warm, plain, not accusatory. Draft for me only.

Want the rest?

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