

From Customer Conversations to Business Outcomes

BE CURIOUS
BE THOUGHTFUL
CREATE PROGRESS

1

Goal

PAINT THE PICTURE



Help the customer describe what success looks like, not just what they want to implement.

- 1 Imagine we're having this conversation six months from now, and everything has gone exceptionally well. **What's different?**
- 2 What are people doing **differently** than they are today?
- 3 What would you see happening in the business that tells you this has worked?
- 4 What would employees, managers, or customers notice?
- 5 What business priority does this support?
- 6 Why is achieving this important now?
- 7 Who stands to benefit most from this change?
- 8 What would your leadership team consider a successful outcome?
- 9 What would be possible for your organization if you achieved this?
- 10 How would you measure whether the change has happened?
- 11 What would happen if you exceeded your expectations?
- 12 Of everything we've discussed, which one or two outcomes matter most?



CSM CHECKPOINT

Restate what you understand the future state to be in their words, including what will change and why it matters. Listen/watch for clues that they want to adapt before moving on.

2

Reality

UNDERSTAND THE GAP



Explore what's happening today in relation to the future the customer described. Separate observations, symptoms, assumptions, and potential causes.

- 1 Thinking about the future you described, what does that look like today?
- 2 Where are you already seeing progress toward that goal?
- 3 What is different between today's situation and where you want to be?
- 4 Can you walk me through a specific example of where things aren't working as you'd like?
- 5 What actually happens when that situation occurs?
- 6 Who is affected, and how?
- 7 How frequently does this happen?
- 8 What evidence tells you this is a problem?
- 9 What do you believe is causing it? What leads you to that conclusion?
- 10 What have you already tried, and what did you learn?
- 11 What else might be contributing to the gap?
- 12 If we addressed the issue you've described, how confident are you that it would help achieve your original goal?



CSM CHECKPOINT

Restate how the problem connects to their goal. Listen/watch for clues that they disagree or want to add more information.

Avoid the jump from symptom to solution

A customer can accurately describe a symptom without accurately identifying its cause.



Premature solution

Customer says:
"Our learners aren't engaging."

Let's look at campaigns, notifications, and gamification.



Consultative exploration

- When you say engagement is low, what are you seeing?
- What were you hoping people would do differently as a result of engaging?
- Is the challenge that people aren't accessing learning, or that they aren't applying what they learn?
- What makes you think engagement is the main barrier to the outcome you described?

3

Options

EXPLORE POSSIBILITIES



Help the customer consider approaches that address the gap and support the desired future state.

- 1 Given what we've discussed, what approaches have you considered?
- 2 What has worked well in other parts of your organization?
- 3 What could you do differently without introducing any new technology?
- 4 What would the ideal approach look like?
- 5 What other ways could you achieve the outcome you described?
- 6 What would happen if you approached the problem from a different angle?
- 7 Which of the barriers we've identified would make the biggest difference if addressed?
- 8 What resources or capabilities do you already have that could help?
- 9 Where might additional expertise be useful?
- 10 What could you test on a small scale before making a larger commitment?
- 11 What are the trade-offs between the options we've discussed?
- 12 Which possibilities seem most likely to move you toward your six-month goal?



CSM CHECKPOINT

Watch for the energy shift in their voice or appearance on specific options they present.

4

Way Forward

TURN INSIGHT INTO ACTION



Agree on practical next steps, ownership, and how progress toward the goal will be evaluated.

- 1 Of the possibilities we've discussed, which would you like to explore further?
- 2 What would be the most useful next step?
- 3 What do we still need to understand before deciding on an approach?
- 4 Who else should be involved in that conversation?
- 5 What expertise or support would help us make progress?
- 6 What would be a reasonable first experiment or pilot?
- 7 What would we expect to see if that experiment worked?
- 8 What information should we capture to evaluate the results?
- 9 What obstacles might prevent us from moving forward?
- 10 Who will take responsibility for each next step?
- 11 When should we reconnect to review what we've learned?
- 12 How will these next steps help us move toward the future you described at the beginning?



CSM CHECKPOINT

Ensure that you have agreed next steps. Communicate these to the relevant internal personnel.

The conversation discipline

1

Envision

Where do we want to be?

2

Understand

Where are we now, and why?

3

Explore

What could move us forward?

4

Commit

What will we do next?



EVERY STAGE CONNECTS BACK TO THE CUSTOMER'S DESIRED OUTCOME.