### Purpose

The purpose of this guide is to help individuals in product management, product marketing, sales and customer success facilitate unbiased business conversation with prospects and customers.

The goal of customer/prospect discovery is to come away understand WHAT they're trying to accomplish (outcomes), WHY those outcomes/goals are critical to their success, WHAT's stopping them, WHY they can't get there and WHAT metrics are used to measure success.

With clear answers to the above questions, you'll never miss the value target!

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# Email Invite Agenda for Customer/Prospect Discovery Meeting

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| Include the Following in the Meeting Invite |
| Hi [name],  I’m looking forward to our upcoming meeting.  Our objective is to understand what's most important to your organization and if/how we can support your priorities.  To that end, I’d like to propose the following agenda for our upcoming meeting.   1. Your top priorities, i.e., what you're being asked to do and why it is critical to your success. 2. How these priorities support the bigger initiatives/strategy of the company. 3. Key obstacles from your perspective. 4. Your ideal solution. 5. How success will be measured. 6. If/how we can support you. |

# Target Customer Discovery Questions & Talking Points

The questions in this document are appropriate for **Product Management** and **Product Marketing** when gathering market needs and business requirements. They’re also appropriate for **Sales** in the discovery phase of the sales process and **Customer Success** teams in the on-boarding/planning process.

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| 1. **WHAT** are some of your top priorities and **WHY** are they critical… |
| * **Senior Executives**…to the success of the company? * **Senior Managers**… to the success of your department? * **Managers & Staff**… to the success of your role? |
| 1. **WHAT** are the biggest obstacles to executing on those priorities and **WHY** do those obstacles exist? |
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| 1. **WHAT** are some of the key changes you’re making, i.e., **WHAT** are you doing to overcome those obstacles? *(In an ideal world, what would you do to eliminate those obstacles?”)* |
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| 1. **WHAT** metrics are you using to measure success and **WHY** are they important (if it’s not obvious)? |
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# Additional Questions & Talking Points

The questions below are different ways of asking the questions in the previous section. Based on your relationship with the customer/prospect, determine the approach they’d be most comfortable with.

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| Conversational Questions for Senior Executives |
| 1. In your opinion, what are the key trends driving your industry right now and how are they impacting the organization? 2. From a strategy perspective, what parts of the business are you focusing on most and why? 3. What areas of the business are you investing in most and why? 4. What parts of the business are most ripe for change and why? 5. Where do you see the industry going over the next 3 or 5 years and how will it impact your organization? |
| Conversational Questions for Senior Managers/Department Heads |
| 1. What are some of the key strategic initiatives in your organization and what’s driving them? 2. How are these initiatives impacting your area of responsibility? What are you being asked to do / do differently? 3. Of all the activities in your area of responsibility, which ones are under the microscope most and why? 4. What areas of your department are most ripe for change and why? 5. What areas of the department are you most focused on improving and why? 6. Which performance metrics in your department are most critical to the business and why? |

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| Conversational Questions for Managers & Staff |
| Given what your managers are asking you to do…   1. If you could change one thing you/your team do in your everyday job, what would it be? 2. Why would you change this part of the job? 3. In the ideal world, how would this be done to get the best results? 4. What's stopping you from doing it this way and why? |

# QuickStart Guide for Facilitating Customer Discovery Meetings

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| Five Go-To Questions to Facilitate Any Conversation – Executive, Manager or Staff |
| 1. What are you trying to accomplish, i.e., what are your top priorities? 2. Why are they important to the success of the organization – why, why, why? 3. What’s stopping you/what are your biggest obstacles and why do they exist? 4. What are you doing to overcome them (procedure or process changes, not products/technology)? 5. What metrics do you use to measure success? |

# Tips for Facilitating Customer/Prospect Conversations

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| Common Scenarios & How to Steer the Conversation Back to a Business Dialogue |
| **The customer is stuck on product needs/issues.**   * 1. Ask them, “what’s the benefit of implementing those features and what will they be able to do that they can’t do now.”   2. Ask them what happens if those product needs aren’t met, i.e., consequences.   3. Ask them how success will be measured once those features are implemented.   4. Once you get the success metrics, find out how it’s connected to a department goal/initiative and the relationship to a strategic goal/initiative, i.e., why will senior executives invest resources in it?   5. If appropriate, find out the job activities/processes that have to change, WHY, and the desired changes. |
| **The customer presents initiatives/goals that sound too fluffy/the objectives aren't clear or actionable.**   1. Go for the obstacles then the metrics – find out the obstacles standing in the way of those goals, then ask them how success will be measured as the obstacles are eliminated. 2. If appropriate, find out the job activities/processes that have to change, WHY, and the desired changes. |

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| Common Scenarios & How to Steer the Conversation Back to a Business Dialogue |
| **One of the customer’s goals is to implement [your product or a product like yours].**   1. Respond with a hypothetical scenario as follows: “Let’s say I snap my fingers and the product is implemented. What’s different now than it was yesterday and why is that important to the organization?” 2. Steer the conversation back to, “what are you trying to accomplish with that implementation?” Keep asking until you get something that resembles a business goal or outcome. 3. Ask “what happens if you don’t implement the solution, the consequences?” The consequences should bring the discussion back to the business aspect of WHY it’s important. 4. If you can’t get to a business goal, ask about the metrics that will render the implementation a success. That should direct the conversation back to an obvious business goal. 5. If appropriate, find out the job activities/processes that have to change, WHY, and the desired changes. |