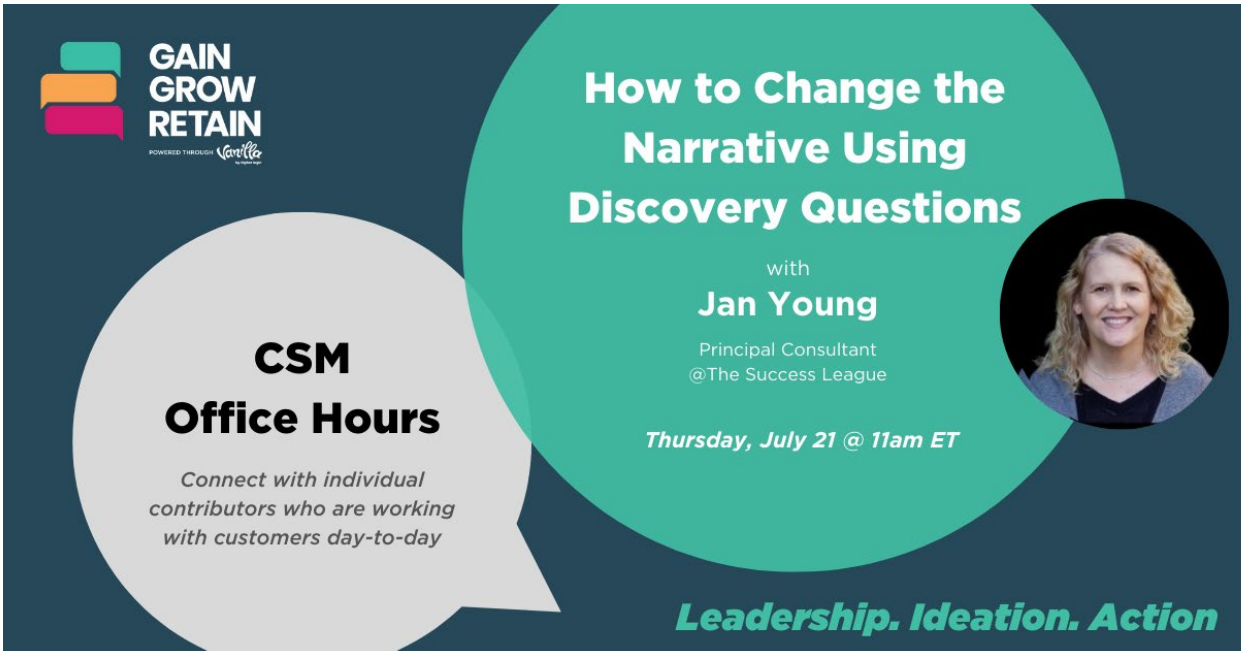

This month, Jan Young joined us as we discussed how using Discovery Questions to learn the Customer "WHY" can positively impact the relationship you have.

When you have customers that are non-responsive, or outright skipping your meetings, it could be that you are not meeting them where they are at, reducing the value these meeting have, and making them just another task they don't have time for.

Perhaps you have customers who show up to meetings with a laundry list of feature requests? Taking in that list without digging in with Discovery Questions reduces your role to an "order taker" instead of a strategic partner and guide. When feature requests are presented (and they will be at some point), it is important to move into the "WHY" behind the request. Ask them: Why it's important, What is the business impact, How does this relate to what they need to achieve in their role & What their company needs to achieve. Relate the list to their business goals. Having this information can change the meeting from a data download to a conversation that results in a deeper understanding of what they are trying to accomplish, helping you to help them more effectively. This also prevents your life from becoming a feature submission/status of update hamster wheel.

Using your time together and positioning strategic discovery questions will increase your understanding of the customer's goals, objectives, and challenges, building a relationship where you can directly support the work they do. Your role becomes that of a strategic consultant with the ability to really dig in and move away from the order taker role.

Discovery Questions should also help you relate your customer conversations back to your Success Plan and the Executive Stakeholders' original reason for purchasing your product. The Success Plan should be at the core of your relationship(s) with the Executive Stakeholder(s), and Discovery Questions help you when you're establishing the Success Plan and executing on it.

So, what ARE discovery questions (more importantly, what are GOOD discovery questions)?

They are:

- Open ended – don't shut down the conversation with questions a customer can answer with a yes or no
- Focused on understanding:
    - Challenges
    - Obstacles
    - Current processes
    - Business impact
- Fluid – add follow up questions that will help you truly get a robust answer, such as "tell me more about that…"

We all know that discovery questions are used in the early days of a customer relationship, but is that the only time? Here are some suggestions and recommendations:

- Kick-Off Meetings
    - Do your homework! What information has already been collected from earlier sales meetings?
        - Don't create a situation where your customer feels like they have to tell the same information to numerous people
        - Use the early information to help shape your questions so you can learn more about the foundational info
        - Truly engage with them!
- Daily/Weekly Meetings
    - Make sure you are identifying your champions, the system administrators, the end-users so you can connect with them
    - Targeted questions for each of these can help give a very robust understanding of the company goals
- Quarterly/Executive Business Reviews
    - Incorporate strategic questions into the agenda
    - Turn these meetings into join Customer Success Plan Updates, which are informed by the discovery questions being asked

The following questions were discussed in the breakout rooms by attendees.

- When have you used Discover Questions to turn around a conversation? What was the impact?
- How have Discovery Questions helped you build a relationship?
- How/when do you envision you could use Discovery Questions?

Small Group Discussion Overview

Creating Strong Questions

- Open ended questions from change management perspective – Command of the Message
    - Allows you to discover their goals and needs
    - Open ended increased their CSAT score
- They have to be tailored depending on industry, size, why they have purchased the product, what their vision of success is, what are their desired outcomes and goals?
- Ask the right questions
    - How do you know you have reached success
    - Determine how to get full buy in
    - Ask the questions in different ways (hat tip: Bob London)
    - What do you want to accomplish
- Use reverse questioning to help clarify any questions being asked
- Work to discover the actual issue(s) and the whys
- What KPI's are being measured for your customer?

- What information is being reported to leadership?
- Discovery questions are used to:
    - Establish expectations
    - Disrupt and engage
        - Ex. Why do you think you're at *insert data point?
    - Identify potential risk
    - What tools are you using?
        - How is success being measured for these tools?

Timing of Questions and Impact

- During the kick-off call, they can help you discover more about their needs, what pain points are occurring, why they came to us (what made us their top choice)
- How can discovery questions be utilized in escalation/renewal calls?
- Be sure to generate new discovery questions at every state of the customer journey
- Asking the questions in a kick-off/discovery call allows for follow up on their answers throughout the year to confirm that goals are being met
- They can be used when:
    - conversations feel dominated by specific individuals, giving others an opportunity to contribute and participate
    - you need to eliminate or identify assumptions
    - the situation is right to open opportunities for upselling and upgrades
    - CSMs need to identify ways to deliver value after the conversation, reinforcing product value and building credibility in the relationship
    - customers are reluctant to speak, stimulating conversation
- Be comfortable with silence. This can often provide space for others to speak up

Maximizing Value

- Customers love to talk about themselves and their business, so they will explain their experiences in detail
- CSMs need to be active listeners, share follow up notes, and build the relationship
- Customer education scales customer success – this is really critical
- Customer Success is all about coaching
- Record the call rather than taking handwritten notes to allow you to focus fully on the conversation
- Scratchpad is a good (and free) tool that syncs well with Salesforce and helps with notetaking
- Reminder that CS is not sales…it is about the irreplaceable value of the customer relationship, requiring strategic CSMs
- If you review any data from the sales conversations or previous CSMs, you can then use that information as a conversation starter as their new CSM with a goal of ensuring understanding and clarifying any unknowns
- Discovery questions are all about helping build the relationship and understanding the impact
- Allows you to build trust by having a true understanding of needs, allowing you to deliver value

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