iconda

The ICON9 Toolkit

Tool templates and summaries

Version 7.4, 17-Mar-17

andrew.betts@icondasolutions.com

ICONDA Solutions SARL à capital variable de €5000
57 rue des Maquis du Grésivaudan, 38920 Crolles, France. 509 694 287 R.C.S. Grenoble

Encounter process | MAP | PAGE | DISC-Y | SUBROUTINE | TMM | TABLE | TSM | OAR | TOOL9

TO ACCESS A TOOL, CLICK ON ONE OF THE LINKS ABOVE

Click here to go to the ICON9 web page

And here to see the "ICON9 In Brief" video

This ICON9 toolkit complements the book "Client Encounters of a Technical Kind".

The kit is provided with Iconda's training programs, and attending a course or participating in other Learning & Development events is the best way to get the most from the tools. However, even if you have not (yet ☺) taken the course, I hope that you find the toolkit valuable.

Templates are available in other formats on request (Excel, PowerPoint, Mind Map).

A SYSTEM FOR FIELD TEAMS

ICON9® is a methodology for optimising the communications of technical field teams, with both customers and colleagues. It has been designed for Customer-Facing Engineers (CFEs) – typically Consulting Engineers, Applications Engineers and Technical Sales and Marketing professionals, though its benefits extend to any person with a technical role and customer responsibilities.

The ICON9 system helps engineers tackle challenges at the interface between technology and communication with confidence, offering a structured approach to the customer-facing role. It provides not only tools for the work, but also language and models that can be adapted to individual and team preferences. Deployed to the four corners of the Earth, the system has proven its worth with experienced and junior CFEs alike, and it's particularly helpful as a common reference for teams facing complex commercial challenges (international customers, emerging technologies, evolving business models, etc.).

The system can be learnt and deployed in a number of ways, including classroom courses, remote coaching, eLearning and certification. Companies can also choose to license training material and use their own trainers, adapting the materials to local culture and language.

Contents

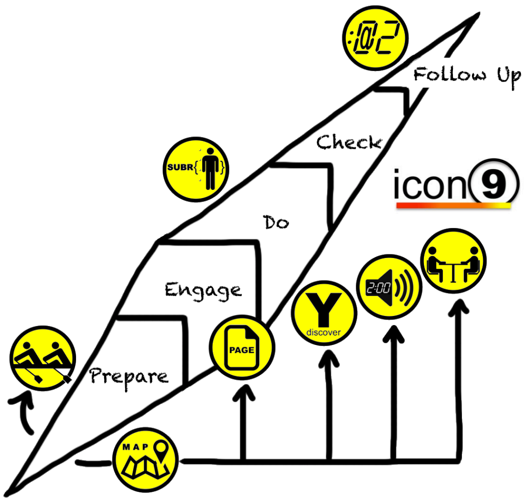
Please note: "Prepare", Engage", "Do", "Check" and "Follow Up", terms used in the Contents table below, are steps of the Encounter Process, explained on the next page.

The Encounter Process 4
Five essential steps for all encounters, big and small. 4
MAP – Format #1 (open) 5
Structures the Prepare step. Revisit in Follow Up to reflect on the encounter. 5
MAP – Format #2 (detailed) 6
PAGE 7
Use in Prepare to plan the start of a meeting in Engage. Revisit in Check. 7
DISCOVER-Y 8
For visualising discovery questions (a Mind Map). Use in Prepare and Do to improve questioning coverage. Also for debrief. 8
THE SUBROUTINE 10
A communication process. Four steps for listening to others and self, and for expressing self to others. Supports all phases. 10
TWO-MINUTE MESSAGE (TMM) 15
Use in Prepare for presentations in the Do phase. 15
THE TABLE 19
A table in which critical negotiation decisions are recorded and shared. Use in Prepare to be ready for Negotiations in Do. 19
TWO-SECOND MESSAGE (TSM) 20
Best practices for email, emphasising use with external clients. Supports Prepare & Follow Up. 20
OAR 24
Use in Prepare & Follow Up to get collaboration from colleagues (and others!) 24
TOOL9 25
Myself, the 9th tool 25
The 9 Tools Together 29
Why 9? 31
To Go Further 32

The Encounter Process

Five essential steps for all encounters, big and small.

The tools in ICON9 are organised around the Encounter Process :



The Encounter Process		
Prepare	Pre-encounter work	Define objectives, audience and plan (possibly with colleagues).
Engage	First contact with the client (either first ever contact, or simply the initial phase of a new meeting)	Take the time to get in sync with the client, to understand their status and motivation.
	Getting down to work	Align on the purpose, agenda and goals for the encounter.
Do	The core of the encounter	Shift between questioning, informing and negotiating as needed (the Discover, Inform, Negotiate triangle).
Check	The end of the contact part of the encounter	Make sure that all loose ends are tied up and that next steps are agreed.
Follow Up	Post-encounter work	Record the outcome (minutes of the meeting) and perform assigned next steps where possible.
		Deal with known vulnerabilities and pitfalls (e.g. confidentiality, politics, technical failure).

MAP – Format #1 (open)

Structures the Prepare step. Revisit in Follow Up to reflect on the encounter.

My objectives (private, immediate, multidirectional)
Audience (makeup, concerns, expectations, obstacles, …)
Plan (PAGE, DISCOVER-Y, …)

MAP – Format #2 (detailed)

My objectives These are private to the field team and concern the immediate encounter only			
Discovery objectives - customer data and careabouts to find out:			
1			
2			
3			
Messaging objectives - points to make and information to communicate:			
4			
5			
6			
Discussion objectives - topics to debate and items to negotiate:			
7			
8			
9			
Questions and Alerts for the Account Manager - need a pre-meeting response on the following:			
A			
B			
Audience			
Composition of the audience:		Role	Attitude*
1			
2			
3			
Anticipated audience expectations - why they are meeting us:			
4			
5			
6			
Possible concerns of the audience - questions we must be ready to answer:			
7			
8			
9			
Questions and Alerts for the Account Manager - need a pre-meeting response on the following:			
A			
B			
Plan			
Purpose - check that others share this at the start of the meeting:			
Agenda and meeting time allocation - to suggest if necessary:			
Goals for the meeting - to discuss if necessary:			
Gameplan - meeting tactics, roles in the field team, important unknowns, etc:			
Questions and Alerts for the Account Manager - need a pre-meeting response on the following:			
A			
B			

** Example attitudes: supporter, obstacle, critic, hostile, unknown, undecided

PAGE

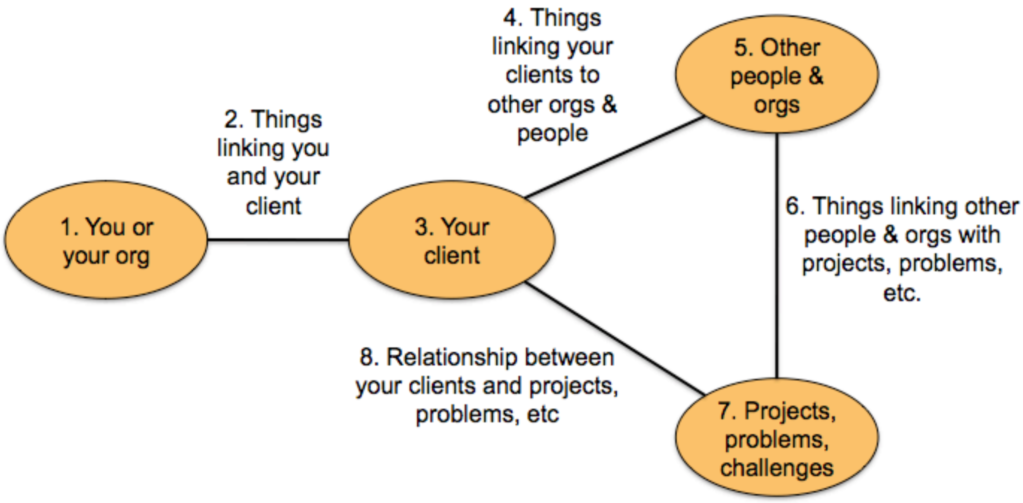
Use in Prepare to plan the start of a meeting in Engage. Revisit in Check.

Purpose (general objective - e.g. to discuss the problems with the …)
Agenda (if possible, the customer presents first; always review the agenda before proceeding)
Goals (a list of specific things to achieve by the end of the meeting)

Remember to get the client's Endorsement - their "Ok" to the above!

DISCOVER-Y[1]

For visualising discovery questions (a Mind Map). Use in Prepare and Do to improve questioning coverage. Also for debrief.



- The DISCOVER-Y *tool* facilitates my Discovery *technique* by helping me visualise and remember topics to cover in conversation with my client.
- For use:
  - Before an encounter, to anticipate and plan
  - During an encounter, to visualise and/or share a picture of the situation with my client
  - After an encounter, to complete an analysis or to debrief with others
- Separates the various people, organisations, activities and problems from each other
- Highlights the relationships between the above

PowerPoint and Mind Map templates are available to help with debrief presentations.

[1] Inspired by V Lenhardt's 8 Intervention Zones

DISCOVER-Y Template (one of many possible formats for collecting brainstorm data)

Before starting, define the client clearly: are they a person or an organisation?

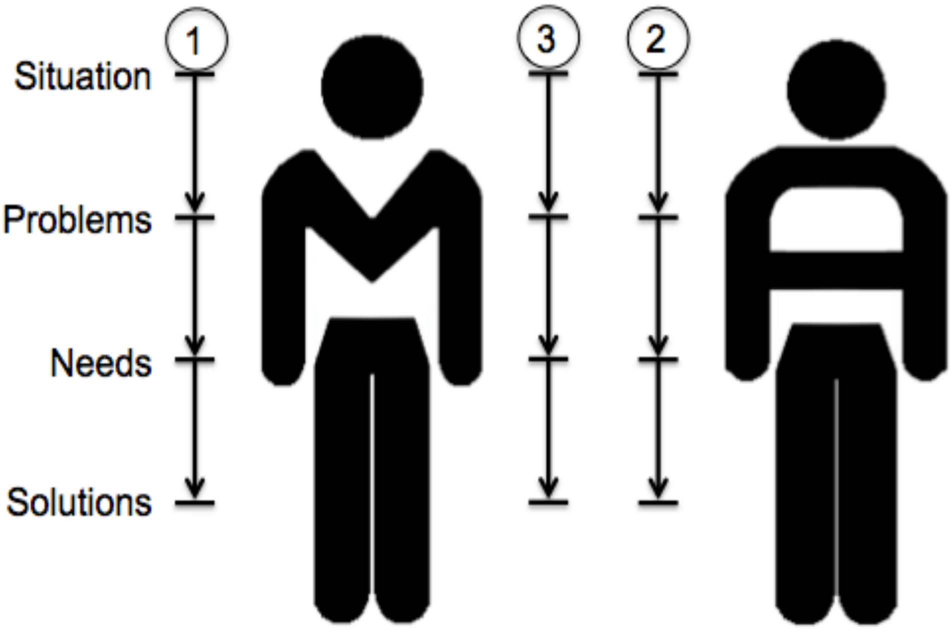
Zone 1 - About me and my organisation, e.g. my MAP, answers to FAQs.
Zone 2 - Things to do with my/our relationship with the client/the client's org.
Zone 3 - About the client
Zone 4 - Things about the relationships between the clients and other people/orgs
Zone 5 - Other relevant people and organisations (single/multiple sentient beings)
Zone 6 - Things about the relationships between others and the technical stuff
Zone 7 - Technical, non-sentient stuff: projects, equipment, technology, data, etc.
Zone 8 - Things about the relationships between the client and the technical stuff
Others and other stuff - any other people of things
Other links - any other relationships

THE SUBROUTINE

A communication process. Four steps for listening to others and self, and for expressing self to others. Supports all phases.

The SUBROUTINE tool consists of the Situation–Problems–Needs–Solutions process used in three different ways: as a Status Check, an Input Routine and an Output Routine. Its use model is shown below, with me on the left and my client on the right.

Process variant 1, the Status Check, is for me to use in order to assess what I am seeing and feeling with respect to the case in hand. Variant 2, the Input Routine, represents the flow for me to use when questioning and listening to my client, in order to understand their view of things. I use the third variant, the Output Routine, when I express myself to my client.



The Big Three errors to avoid:

- Interpretations:
  - Projections: he thought …, their idea was …, they wanted to …
  - Accusations: after he did this …, their software caused …, you told me that …
- Judgements
  - Good, bad, fast, slow, complicated, stupid, useless, boring, …
- Generalisations/rules
  - They always …, my boss never …, it must …

The SUBROUTINE for a Personal Status Check

```
subr1() {
    situation();    // What do I observe? (separating facts from
                       judgements, interpretations and generalisations)

    problems();     // How is this situation affecting me? (identifying the
                       issues and their impact on me)

    needs();        // What are my 'satisfaction gaps'? (including
                       professional interests and requirements)

    solutions();    // What should I do?  Actions that may fulfil my
                       needs.
}
```

Situation
I let everything related to the Situation come to mind—both objective reality (facts) and filtered reality (judgements, interpretations, generalisations). For example, 'The client was very late' is a judgement.
Once I have been through the above 'cleansing' procedure, I review the objective reality. What have I really seen and heard? For example, 'The client called in 10 minutes after the time agreed for the tele-meeting.'
Problems
Starting with the most obvious, I investigate the issues, listening to myself empathetically to understand how they are affecting me.
At the surface I may find, for example, that 'since the meeting started late, we didn't have time to get through the whole agenda'. Digging a little deeper will lead to, perhaps, a feeling of insecurity because I have the impression that I am not important to this client, or maybe to anger and irritation because I have a huge workload and can't afford to waste time.
Needs
Taking each Problem in turn, I try to identify the associated 'satisfaction gaps', or Needs.
I express my Needs at the highest useful level of abstraction possible, thereby creating the maximum number of Solution possibilities while avoiding the error of expressing Solution strategies at this stage.
Examples: If my Problem is a feeling of insecurity about a client, then my Need may be to understand their level of commitment to my company. If my Problem is that I am angry about wasting time, then maybe I need to feel more in control of my day. Behind this Need could be a deeper one, such as self-esteem—I feel bad about myself when events get out of my control. And so on.
Solutions
Very often, it is not necessary to go to this step straight away. Once I have understood my Needs sufficiently well, Solutions may be either obvious or non-urgent.
Each Need may have several alternative Solutions. I try to not become too attached to any particular one.
In the context of a negotiation, I identify my Fallback Solution at this stage.

The SUBROUTINE for Input

```
subr2() {
    situation();    // What is observed? (separating reported facts from
                       judgements, interpretations and generalisations)

    problems();     // How is this situation affecting my client? (identifying
                       issues and their impact)

    needs();        // What are the client's 'satisfaction gaps'? (often called
                       interests and requirements; not to be confused with
                       requests for specific solutions)

    solutions();    // What solutions have they tried in order to fulfil their
                       needs?
}
```

Situation
When listening to my client, I separate factual from filtered information.
It is useful to be able to spot filtering, since this provides me with a starting point for a sequence of questions. For example, I can discover what is behind a client's judgement that a device is 'slow' by asking, 'When you say "slow", do you mean less than 10MHz …?'
Problems
I discover which aspects of the Situation are problematic for my client. It's OK to guess, e.g: '… and so if the sampling rate is below 10MHz, you will miss defects?'
Behind the obvious Problems may lie more interesting issues, linked to the way that the client feels about a past or present Situation, or to their expectations or fears for the future.
I use my experience of similar Situations to empathise with my client, avoiding the temptation to make it about me, e.g: I refrain from 'I had a problem like that once …'.
Needs
Discovering Needs is *the* crucial step and, though it requires some skill, it is safe. If I demonstrate a genuine desire to find out what my client needs, they will usually help.
It is rare that people fully understand their Needs and they are therefore often open to suggestions. This is not the case for Solutions, where suggestions tend to be met with 'Yes, but …' and other forms of objection.
To help someone understand the relative importance of Needs, I may discuss the payoff should they be met.
Solutions
I investigate the Solutions that my client has already tried.
A real conversation or negotiation will not follow a linear path through the SUBROUTINE process—it will jump around. I therefore need to be assertive in taking the discussion back to an earlier step when I see that Solutions are being discussed too early.
Beware: clients may push to go straight from a discussion of the Situation to their ideas for a Solution. This is one example of a Short Circuit.

The SUBROUTINE for Output

```
subr3() {
    situation();   // My observations (avoiding judgements, interpretations
                      and generalisations)

    problems();    // How this affects me and my organisation

    needs();       // What I therefore need (at a high level of abstraction)

    solutions();   // Actions that may fulfil these needs: a request or a
                      proposal for action
}
```

Situation
The Situation that I describe is usually based on the information gained from processes 1 and 2—empathetic listening to myself and my client.
I describe the Situation objectively, avoiding filtering (judgements, interpretations and generalisations).
If I wish to play back what I learned from my client using SUBROUTINE process 2 and Guiding Discovery, then it all goes here: I report the client's Situation, Problems, Needs and attempted Solutions as part of my Situation.
Problems
I express what is unsatisfactory (or, sometimes, satisfactory) in the Situation from my point of view.
It is not always necessary or advisable to reveal my emotional state, but it is important to know how to do so when the occasion justifies it.
I take ownership of whatever emotions are concerned. For example, 'When I hear that the project has been cancelled, I feel disappointed' is better (less judgemental and more accurate) than 'That's disappointing!'.
Needs
The Needs expressed should relate to the Problems previously described.
I describe my Needs using terms that refer to me only; e.g. 'I need to understand X better' rather than 'I need you to explain X to me more clearly'. The former cannot be disputed, but the latter may be seen as an accusation.
Needs should be described at the highest useful level of abstraction, leaving as much room as possible for alternative Solutions.
Solutions
I suggest a Solution or make a request for action, checking that I did not inadvertently jump to this step directly from the Situation one!
I frame my requests for action *in the present*, if possible. Asking for a promise of future action sets up a 'to do' on one side of a conversation and a need to check the action on the other. Better to ask someone to explain something immediately, or to play back their understanding of an issue, for example.
When requesting actions, I suggest alternatives where possible, in order to avoid giving the other person a feeling of being trapped.

SUBROUTINE template (for thinking through SUBR use in any mode)

Situation (avoid judgements, interpretations and generalisations/rules)
Problems (always subjective - relate to the feelings of the person concerned [me or my client])
Needs (needs are not solution strategies - be careful to distinguish)
Solutions (status check: possible alternative actions; input: what they have tried; output: a request)

TWO-MINUTE MESSAGE (TMM)[2]

Use in Prepare for presentations in the Do phase.

The templates below are to help with producing new document, presentation or training content, usually with existing content as a starting point.

The key to producing new, high quality content **that is a good match to your audience** and which **meets your objectives** is to avoid being influenced by existing content until your own ideas are in place. **TRY TO COMPLETE YOUR TMM BEFORE LOOKING AT SLIDES OR DOCUMENTS OR INTERNET PAGES OR ANY OTHER POTENTIAL SOURCE OF REUSABLE MATERIAL.** Once you have completed your TMM synopsis, you will find that the selection and reuse of existing material is straightforward, and that you have saved a lot of time!!

Hence the sequence of events has to be:

1. Write a TMM synopsis describing what you want to express (see templates below)

   This is only one sheet, and the resulting message can be read in about 2 minutes (hence the name "Two Minute Message"). However, this one-sheet, two-minute synopsis can be difficult to write sometimes. In fact, the harder it is to write, the more it is needed.

   Once it is done, you are 80% of the way to having the final presentation or document.

   To briefly summarise (please refer to www.twominutemessage.com for details), a TMM is a synopsis encompassing the main points of an idea. It has 4 parts:

   Audience Context Statement. This explains the motivation for the subject in a way that is likely to interest the audience and help them relate the subject to their concerns.

   Key Statement. The message or concept that permeates your presentation and which will help you to achieve your Objective.

   Supporting Statements. Three or four Statements that support the Key Statement.

   Closing Statement. This should link back to your Objective and lead to the desired commitment or next steps.

2. Complete the production of your new content

[2] Thanks to William Freeman for the TMM (http://www.twominutemessage.com)

Standard TMM Template

My objectives:		
Audience:		
Plan = TMM		The idea of writing the TMM synopsis is to force oneself to clarify the key ideas in the document that is to be produced. It helps if you write complete, meaningful sentences, rather than bullet points.
TMM	**Audience Context Statement**	To start, I will strongly attract the audience's attention by saying …...
	Key Statement	The main message/concept is ………
	Supporting Statements	In support of my main message I will make the following points: …..
	Closing Statement	I will wrap up and motivate my client to act by saying (try to link back to the ACS) ….

Challenger TMM Template

<table>
<tr><td colspan="2">My objectives:</td><td></td><td colspan="2" rowspan="2">Challenger™ is a trademark and service mark of The Corporate Executive Board Company.</td></tr>
<tr><td colspan="2">Audience:</td><td></td></tr>
<tr><td colspan="2">Plan = TMM</td><td>The idea of writing the TMM synopsis is to force oneself to clarify the key ideas in the document that is to be produced. It helps if you write complete, meaningful sentences, rather than bullet points.</td><td colspan="2">CHALLENGER™ SUBSTRUCTURE (I work towards my Unique Strengths, rather than leading with a Wonderful Solution)</td></tr>
<tr><td rowspan="4">TMM</td><td>Audience Context Statement</td><td>To start, I will strongly attract the audience's attention by saying ……</td><td colspan="2">THE WARMER: For example, relevant observations from your work with other companies and the trends that you have seen.</td></tr>
<tr><td>Key Statement</td><td>The main message/concept is ………</td><td colspan="2">REFRAME: A challenging new perspective.</td></tr>
<tr><td>Supporting Statements</td><td>In support of my main message I will make the following points: …..</td><td>SITUATION: Facts and figures to support the Key Statement ("Rational Drowning" in Challenger terms)
PROBLEMS:
Involve them in the story.
Why they cannot afford to ignore this new perspective
("Emotional Impact" in Challenger terms).
NEEDS:
Given this new perspective, the best approach.
I do NOT mention my solution yet!
("A New Way" in Challenger terms).
SOLUTIONS:
Links the Needs to solutions I can provide.
Just enough information to ensure follow up (see below).</td><td>The SUBROUTINE process</td></tr>
<tr><td>Closing Statement</td><td>I will wrap up and motivate my client to act by saying (try to link back to the ACS) ….</td><td colspan="2">AGREE TO ACT: Summarise and motivate the client to take the next step (at this stage, provide only the necessary detail of your solution to get an agreement on the next step).</td></tr>
</table>

Training TMM Template

<table>
<tr><td colspan="2">My objectives:</td><td></td></tr>
<tr><td colspan="2">Audience:</td><td></td></tr>
<tr><td colspan="2">Plan = TMM</td><td>The idea of writing the TMM synopsis is to force oneself to clarify the key ideas in the document that is to be produced. It helps if you write complete, meaningful sentences, rather than bullet points.</td></tr>
<tr><td rowspan="13">TMM</td><td>Audience Context Statement</td><td>To start, I will strongly attract the audience's attention by saying ……</td><td colspan="2">The section below is for the refinement of the Key Statement and Supporting Statements when planning training sessions</td></tr>
<tr><td>Key Statement</td><td>The main message/concept is ………</td><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td rowspan="10">Supporting Statements</td><td rowspan="10">In support of my main message I will make the following points: …..</td><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Lte/Act/Chk*</td><td>Decription …</td></tr>
<tr><td>Closing Statement</td><td>I will wrap up and motivate my client to act by saying (try to link back to the ACS) ….</td><td colspan="2">* select one: Lte = Lecturette, Act = Activity (learning), Chk = Check&Feedback</td></tr>
</table>

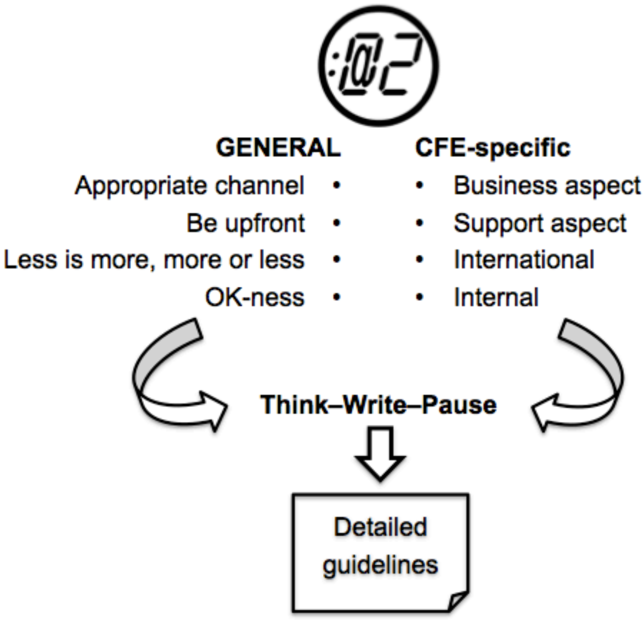
THE TABLE

A table in which critical negotiation decisions are recorded and shared. Use in Prepare to be ready for Negotiations in Do.

My objectives	Negotiation target, discovery targets, information to protect …									
Audience	Anticipating the client negotiator(s), their concerns, etc.									
Plan	**Request! (concessions I may request during negotiations)**		**Value to me**				**Cost to them**			
	1		1	2	3	4	1	2	3	4
	2		1	2	3	4	1	2	3	4
	3		1	2	3	4	1	2	3	4
	4		1	2	3	4	1	2	3	4
	Offer? (concessions I may offer during negotiations)		**Cost to me**				**Value to them**			
	1		1	2	3	4	1	2	3	4
	2		1	2	3	4	1	2	3	4
	3		1	2	3	4	1	2	3	4
	4		1	2	3	4	1	2	3	4
	Fall Lines (conditions that trigger a pause/rethink)									
	My Fallback (plan B—the best alternative to an agreement)									
	Their Fallback (my assessment of their plan B …)									
	My Fallout (consequences of no agreement + use of Fallback)									
	Their Fallout (my guess at the consequences for them …)									

TWO-SECOND MESSAGE (TSM)

Best practices for email, emphasising use with external clients. Supports Prepare & Follow Up.



The TWO-SECOND MESSAGE system is based upon the idea that, for an email to be effective, its purpose must become clear to the reader in just a couple of seconds. While this is not the only measure of effectiveness, its importance is emphasised by the 'TWO-SECOND MESSAGE' title, which is in itself a concise message.

The system consists of a 'Think–Write–Pause' flow and four general guidelines ('GENERAL' in the diagram – see *Client Encounters*[3]). The CFE[4]-specific part is captured in four sets of requirements ('CFE-specific' in the diagram).

Think

This step describes the interval from the moment when an email is first envisaged to the moment when writing begins. The purpose of the step is to consider my email, whether it be the start of a thread or a reply, at a level above the detail of the words to be used. It gives me a chance to consider, for example:

- Will the email be a good investment of my time?
- Is email the appropriate communication channel?
- When replying, have I fully understood a received mail? Am I overreacting? Should I start a new thread? etc.

Write

This is the step where I hit the keys.

Pause

The Pause step is for checking and final reflection. Things to be checked include spelling and grammar, but also more delicate issues such as the copy list and any confidentiality issues. The pause, which can last from a split second to many hours, is my last opportunity to avoid sending something that was written while in, let's say, a suboptimal mood.

[3] "Client Encounters of the Technical Kind" – see last page of this document
[4] CFE = Customer-Facing Engineer

THINK – CFE-Specific Guideline Suggestions using the TSM Approach

T1. WIIFM

What's in it for me? Is it worth my time?

T2. Choose the channel

Consider communication options other than email—e.g. telephone or tele/video conference. When replying to email, question the reflex of replying to one email with another.

T3. Decide who to put or keep on copy

Be careful with who is on copy. If in doubt, ask—there is no safe option by default. Both too many and too few Cc:s can be dangerous, depending on the circumstances. As well as asking (e.g. by telephone), another possibility is to make it clear in the mail that you have left it to your client to copy the mail to the appropriate people in their organisation.

When replying to a mail, don't automatically maintain the original copy list. Keep the list to the minimum necessary.

Is your colleagues' privacy protected? Think carefully before putting them on open copy to people outside your organisation.

T4. Think positive

Adopt positive beliefs about your clients' capabilities. Avoid the pastime of ridiculing them with your colleagues. By having a positive mindset with respect to your clients you increase the chances that your communication will be respectful and constructive.

T5. Be careful with confidential information

If in doubt, leave it out (or ask). If your company has confidentiality guidelines, then refer to them as necessary.

T6. Acknowledge receipt of support requests promptly

Even if a support request can't be answered immediately, it should be acknowledged. This point notwithstanding, a little delay before investing in a detailed reply can act as a low pass filter, reducing the total volume of email traffic and allowing time for spurious problems to sort themselves out.

T7. Beware of assumptions

Don't assume that your client understood or remembered all the points in your last mail. Imagine that they read it while distracted. Consider reiterating important points, just to be sure.

Be sure that you have fully understood an incoming issue before replying to it. If there is any doubt, ask for clarification. Try to avoid sending any information with the request for clarification, as this can confuse.

T8. What about the Support Case system?

Has all relevant mail been copied into the Support Case system? Is there anything in there that might help with the issue in question?

WRITE - CFE-Specific Guideline Suggestions using the TSM Approach

W1. Respect the thread

When replying, don't alter the mail title unless absolutely necessary.

W2. Simple formatting

Don't rely on rich text, html or other formatting. Your client's tools may be different from yours, with unexpected consequences.

W3. Write upfront email

State your purpose/main message clearly, immediately after the greeting.

W4. Structure long emails as a head and a tail

If a mail must be long, break it down into a short header that includes the sign-off (preceded by any Next Steps) and a longer tail or attachment.

W5. Use playback

As for face-to-face meetings, if you reword what your client has written it can reassure them that you have understood. It could also prevent a misunderstanding.

W6. Clear Next Steps

Ensure that Next Steps (e.g. a request for information) are clearly visible and likely to be read (see the W4 guideline on breaking long emails down into a header and a tail).

W7. Discovery checklist

For support work with a repetitive element, maintain a checklist of questions that you frequently need answers to—see examples below:

- Discover the client's intent—what are they trying to do?
- Discover the last thing that worked before the problem arose.
- Discover tool versions, environment, etc.

W8. Explain the process

If you cannot solve an issue immediately, explain the process that you are using to do so and give the client some idea of when you will get back to them next.

W9. Help them to help you

Send clear instructions on how to capture examples etc. If possible, send scripts or similar to help with this.

W10. Refer to and reply

Refer to existing documentation if possible, as well as replying to the issue. You should still reply to the issue in the email, even if it simply means copy-and-paste from the document that you reference. The client will perhaps realise that they should have looked in the documentation before contacting you next time, and they will appreciate your courtesy.

W11. Stick to the problem in hand

Make sure that explanations and examples don't go beyond what is necessary to solve the problem. Don't show off—at least, not in the reply to an issue. If there is interesting, supplementary information to send to a client, then make this the subject of a separate communication.

W12. Take care of the greeting

For example, when you email someone after a gap, or when switching to email from some other form of communication, a few words of consideration can help: e.g. ‘I hope that this email finds you well’, ‘Thank your for time on the telephone earlier’. High-context cultures (e.g. Japan, China) expect this sort of consideration more than low-context ones (e.g. USA, Israel), where a more direct approach is normal.

In a technical support context, it is normal to address people by their first name in mail. However, this also depends on culture. For example, you should use <surname>-san with Japanese correspondents, even if they sign their mails with their first names.

W13. Avoid irritating phrases

Avoid phrases such as ‘as I explained previously’ or ‘as you will see from my previous mail’—that sort of thing can be interpreted as rude and/or as an accusation.

W14. Thanks

Thank the client if appropriate (e.g. for raising an issue that helps improve the product).

W15. Time zones

When organising a meeting across time zones, state the times explicitly in all the time zones concerned. Don’t rely on calendar invitations to do this automatically—they don’t always work.

PAUSE - CFE-Specific Guideline Suggestions using the TSM Approach

P1. Possible to misunderstand?

How could your mail be misunderstood? Is there any humour in the mail? If so, is it appropriate for all possible readers? Are emoticons used to indicate intent?

P2. Attachments

Are they of a reasonable size? If they are referred to, are they really attached? If they are attached, are they referred to?

P3. Address lists OK?

Beware of the autocomplete feature on email tools: double-check the address lists.

A common convention is that ‘To:’ means for action/attention, ‘Cc:’ means for information only and ‘Bcc:’ means for your private information, do not forward.

P4. Spell check

Is the spelling OK?

P5. Quote level?

Is the quote level no higher than three?

Avoid excessive quoting. This often occurs in messages that are answered point by point, with the question–answer session visible through different quote levels. Beyond three levels of quote, reformat and start again … or maybe pick up the telephone.

P6. Feeling OK about sending this, really?

How do you feel? Don’t hit the ‘send’ button if you are feeling irritated, even if you think that your mail is polite. Do you really need to send the mail this minute, or could you wait for an hour (and perhaps use the time to recheck it or get a second opinion)?

OAR

Use in Prepare & Follow Up to get collaboration from colleagues (and others!).

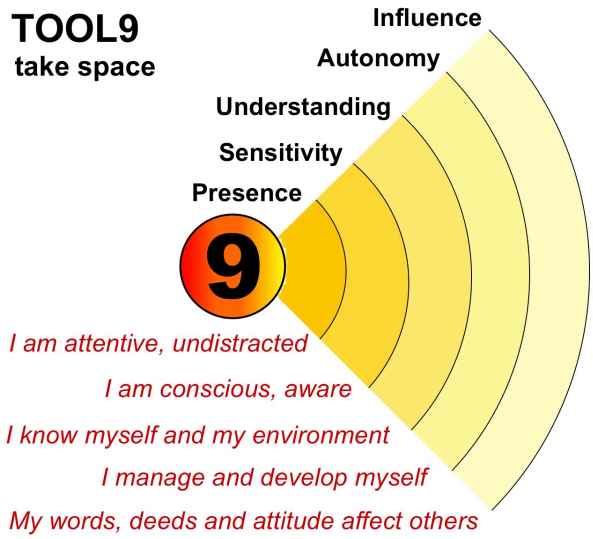
Our challenge (looking beyond immediate objectives)
Audience (makeup, concerns, expectations, obstacles, … for the ultimate/indirect client)
Resources (that will allow my direct client to plan … avoiding micromanagement)

TOOL9

Myself, the 9th tool

While ICON9's first eight tools are presented as acronyms, diagrams, checklists and tables, TOOL9 is made of flesh and blood. It's me, myself, the most important tool that I have when facing a client.

My qualities as a person are of fundamental importance, no matter what my profession. However, the consequences of insufficient presence, sensitivity, self-understanding or autonomy are particularly damaging for Customer-Facing Engineers since they affect my client's trust, and this asset is much easier to lose than to recover.



My Own Space

Having agreed that TOOL9 is crucial, the next question is, "What tools should I use for its development and maintenance?". I suggest that each person choose their own, but that there is one that is fundamental. One tool to rule them all. Space.

Space to think, experiment and reflect. Space in x, y, z and especially t. Space to go where no man has gone before, in the sense that every person's journey is unique, even if we are all extraordinarily similar in many ways.

Space provides an opportunity to think calmly, without hurry, and to allow understanding and ideas to turn up when they see fit. In particular, it is a pre-requisite to a non-linear thinking process. This is unlike the one that I habitually use when dealing with everyday life, where problems can generally be dealt with using logic. In this case, the harder I think and the more coffee I drink, the quicker I work things out.

Self-development and maintenance is, in some ways, a fairly easy pursuit once Space is available for it. On the other hand, if I am constantly in a rush, my life crowded with Things To Do, with worries preventing my sleep and daily survival dependent on all sorts of physical and psychological props, then it's almost impossible. But make a little space for myself and the process is quite simple, even if it takes time.

Space allows me to experience Presence which in turn enables Sensitivity then Understanding, Autonomy and finally Influence. This is a kind of process, but although its earlier steps are pre-requisites to the later ones, they are all simultaneously active. That is, once I increase Sensitivity to myself and my surroundings, this augments my sense of Presence also. Similarly, as a pieces of my personal puzzles begin to fall into place (Understanding), my Sensitivity is further amplified because I start to register factors and feelings that I wouldn't previously have noticed. I will get to Autonomy and Influence in a moment.

It Starts with Presence

As the wise turtle in the film Kung Fu Panda said, "The Past is history, the Future a mystery, but Today is a gift. That's why we call it the present." Putting aside the bizarre and charming source of this wisdom, I like this quote because it reminds me that Presence means *not* concerning myself with the Past or the Future. If I listen to my thoughts for a few moments and find that they are mainly concerned with one of these intruders - concerns about why something happened or worries about what will happen soon, for example - then I am not really experiencing the present moment.

If life were broken down into (very many) discrete instants, then only D% of these instants could be qualified as really disagreeable. Root canal work and listening to recent election results might go into this D%. It leaves (100-D)% of life to enjoy, but only if I have the Presence to do so. Else, if D is multiplied by C, the number of times that my thoughts stray to concerns rooted in the past, and by W, the number of times that I worry about the future, then my enjoyable existence is reduced to (100 - (C+W)*D)%. The wise turtle's explanation was more poetic, but I hope that the mathematically minded appreciate this alternative formulation ☺

Presence gives me access to what is happening at this moment and, the chances are, this access is worth having. If I sit down in my favourite café only to worry about an upcoming customer visit, then I am savouring neither the 'ambiance' around me nor the cappuccino in front of me. There is invariably something to appreciate in the present moment, even if I cannot articulate it - a feeling of security or, in contrast, excitement; an interesting site or a beautiful view; a taste, a smell, sounds of music; insight, amusement, clarity; in short, being alive!

Sensitivity Helps Increase Awareness

As mentioned, Sensitivity is the quality of noticing what is going on around me and, crucially, how I am reacting to it. This includes noticing my reactions to other people. For example, I might feel a slight rush of blood when in contact with someone or, conversely, a tight feeling in my gut. Sensitivity allows me to register such reactions and it is the opposite of obliviousness. If I am oblivious, then I blunder through life without seeing what effect I am having on other people or how they are affecting me. I am a blind lobster, with a shell that blocks signals from the outside world. Since these signals can't get through to my sensitive inner self, I don't feel anything.

Understanding Follows

Understanding is, for example, a realization of what the rush of blood or tight gut feeling might mean - perhaps this person excites me or, in the case of the tight gut feeling, frightens me. This 'step' of the 'process' is where I build up a model of both the outside world and of my inner world. For example, my own attempts to better understand myself included compiling a Personality Inventory using the Process Communication tool (I have also tried the DISC and MBTI systems). The inventory gave a summary of my personality structure, allowing me to better understand my reactions under stress, my dominant psychological needs, and so on.

The exercise helped me a lot, but that is not my only point. Compiling a Personality Inventory involves filling out a questionnaire and, as the vendors of the Process Communication tool explain, the accuracy of the result depends on the lucidity of the person answering that questionnaire. In other words, it depends on their Presence and Sensitivity.

Autonomy Becomes Possible

Presence, Sensitivity and Understanding lead to Autonomy, the foundation of independence and interdependence. Autonomy was described by Viktor Frankl as follows, "Everything can be taken from a man but one thing: the last of human freedoms - to choose one's attitude in any given set of circumstances, to choose one's own way." Frankl was an extraordinary man. He survived the Nazi death camps and setup a new school of psychotherapy, essentially based on this principle - that we are responsible for our own feelings, attitudes and decisions, and that we each decide what makes sense for us.

As my Autonomy increases, I become less dependent on others for my sense of security and well-being. For example, an unkind or careless remark by a colleague that might have caused me hurt feelings in the past now triggers me to ask, "Strange, what's up with them today?". Similarly, when my carefully crafted email receives no response, rather than ask myself, "What’s wrong with what I wrote?", I am unperturbed and simply follow up with a telephone call. Autonomy enables self-confidence without the downside of arrogance.

The first consequence (and benefit) of Autonomy is the ability to make necessary choices, acting consistently with my understanding of myself – my needs, values and beliefs – and without requiring others to agree. This does not mean that I impose my views, but simply that I can make firm choices, at peace with myself.

Influence Results

The second, natural consequence of Autonomy is Influence, since the grounded, centered attitude that comes with Autonomy communicates itself to others.

I picture this influencing process as something that starts with Presence and, in my metaphor, moments of Presence are like tiny lights turning on. These tiny lights are surrounded by others, some of them associated with Presence, others with Sensitivity and, further out, Understanding, Autonomy and Influence. The lights have laser-like properties, so that incoming light causes them to light up in turn and to amplify the light they receive. Hence, moments of Presence cause Sensitivity lights to come on, which not only trigger more Presence and Sensitivity, but Understanding also. Gradually, more light accumulates, so that Autonomy starts to glow, and Influence begins to radiate. As time goes on, the light level increases and increases until it can be seen from far and wide. It is not only strong but inexhaustible - a light is not diminished by having more people use it to see by.

Space, Me and Others

This entire, natural process is at everyone's disposal, provided they can make Space for it. It comes down to reserving time for walking alone, meditation, or some other practice, in circumstances where I am unlikely to be disturbed. This does not require a monastery. Headphones and peaceful music while sitting in an airplane can do the trick!

I find it interesting that many people who find themselves in situations where they are alone for significant periods have a certain presence. I once met Pete Goss, the round-the-world yacht-racer who fished fellow competitor Raphaël Dinelli out of the Southern Ocean in a 1997 storm. Cool as a cucumber. Eyes as clear as can be. Speaks with ease, self-assurance and humility, and is also incredibly impressive. He obviously makes good use of Space.

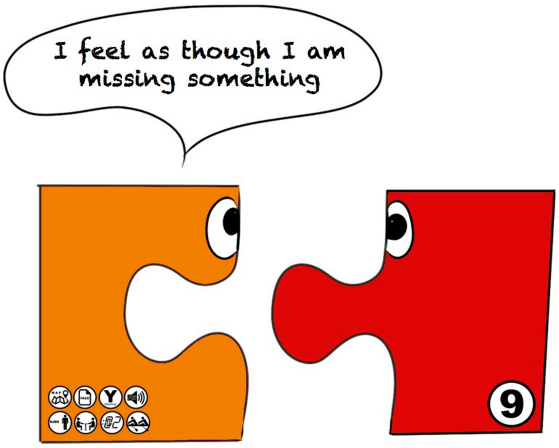
Another example shows that Space can be found anywhere, anytime, even in the busiest places and under the most intense pressure. I once attended a training course facilitated by a leader in the area of NonViolent Communication. There were about 24 people present and I can say from experience that managing 24 adults on such a course is no easy matter. In spite of the pressure, the facilitator was able to detach himself when needed by simply closing his eyes for a few seconds. He took the Space he needed in order to recover himself and decide what to say or do, leaving his audience temporarily to manage themselves. A few seconds later, he was back, bright eyed and bushy tailed, having found what he was looking for. The first couple of times I saw this, I was surprised, but I quickly came to appreciate the effectiveness of this way of being, and the presence that it gave the facilitator.

The 9 Tools Together

TOOL9 differs markedly from the other eight in the ICON9 toolkit, leading to the question, "How do they fit together?". The answer is in two important ways:

- TOOL9 and the set of the other eight tools are complementary to each other
- The first eight tools create Space for TOOL9

Complementarity



In principle, I could learn to use MAP, PAGE, DISCOVER-Y, TWO-MINUTE MESSAGE, THE SUBROUTINE, TABLE, TWO-SECOND MESSAGE and OAR in a purely technocratic way, mastering the mechanics of each tool and deploying them perfectly but soullessly in any situation. While a client might be impressed with such a performance at first, they would quickly become dissatisfied with such shallow technicality.

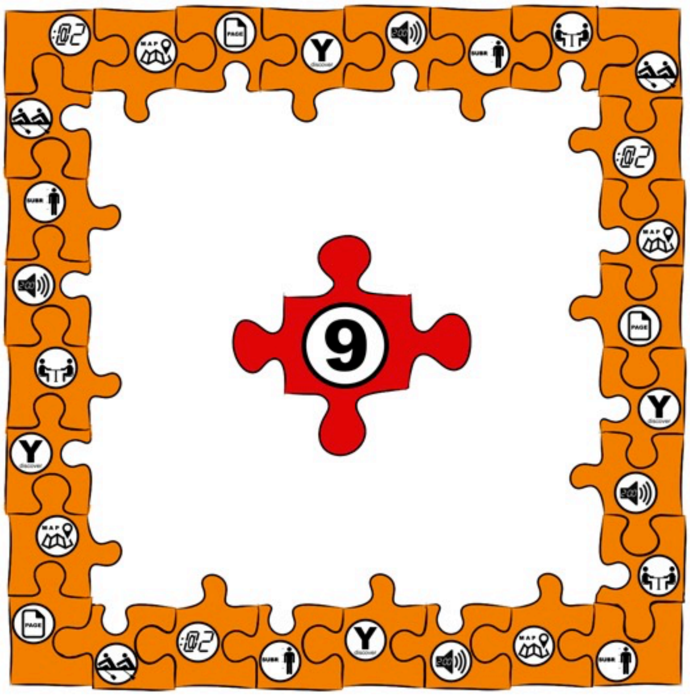
On the other hand, if I had absolutely no notion of the ICON9 tools and methods, and no experience with anything similar, then I might still create a favourable first impression with my personality and posture (attributes of TOOL9). Unfortunately, my client would soon realise that I was incompetent.

Hence, there is complementarity between the first eight ICON9 tools, which are somewhat technical, and the ninth, which is to do with my development as a person.

Creating Space

As explained in the text above, Space is key to my personal growth - to the development and maintenance of TOOL9. One of the key benefits of using the first eight tools of the ICON9 toolkit is that they create Space for the ninth by providing efficiency.

If I am inefficient, then I am even busier than need be, with no time to look after myself. Although the ICON9 toolkit is not promoted as a time management system, avoiding unnecessary effort is one of its main benefits. Hence I end up with more time with which to organise myself. The tools get the simple stuff out of the way, allowing me to concentrate on and learn from the subtler aspects of a customer meeting. They provide a vocabulary and an intellectual framework that allows me to write emails and reports faster. They contain checklists and are supported by templates. In short, they provide all sorts of collateral to help me clear the decks – to create Space.



Creating Space

Why 9?

The reader may be wondering why the ICON9 system deliberately limits itself with the number 9. At first sight, this may seem like an unwise constraint, limiting the possibilities for future extensions to the system. In fact, the motivation for ICON9 is to inspire CFEs and accelerate their independent professional development, not to give them a crutch that they will need for the rest of their careers. Hence, the system does not come with a reference manual of 100+ tools to cover all eventualities (such books do exist). Rather, it focuses on a few things that are absolutely essential, and these act as a starting point from which to dig deeper. For example, there exist many excellent methods for elaborating objectives, for analysing an audience context and for planning. MAP is just the tip of a huge iceberg.

And, of course, ICON9 is not the only system facilitating customer meetings (though it is the only one I am aware of that specifically targets Customer-Facing Engineers). It doesn't matter if I use an encounter preparation method other than MAP, so long as I have a method for ensuring that I consider my objectives and the audience context, and that I have some kind of plan in mind. Similar comments can be made for all the other tools.

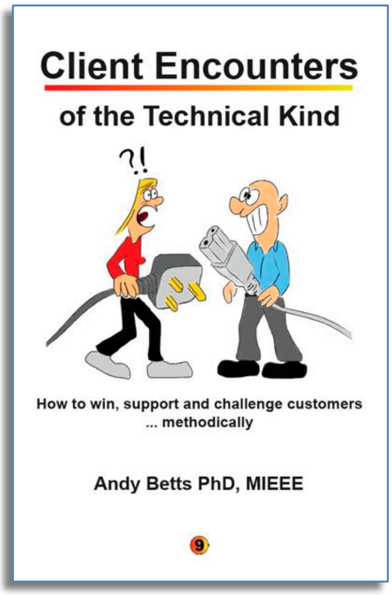
The role of ICON9 as a springboard for independent professional development is reflected in the way that ICON9 learning and development programs are structured. In additional to traditional classroom-based training classes, such programs include a number of pre-formatted coaching sessions where individual CFEs are assisted by ICON9 coaches. Independent work associated with these sessions aims primarily at developing powers of observation (Presence and Sensitivity). CFEs practice observing the dynamics of the client encounters in which they are involved, paying attention to points that they might not have noticed in the past. They structure their observations using ICON9's models, and this helps them get more out of their meetings than they used to (Understanding). Of course, they review past experiences when doing this and, helped by training and coaching, reinforce their professional capacities (Autonomy). Clients can't help but notice that they are in the presence of a confident, self-aware professional, and so they take notice (Influence).

I hope that these words communicate something of the philosophy underpinning ICON9, and that they help the reader to maximise the benefits they obtain from the system.

Andy Betts

Feb 2017

To Go Further



'Client Encounters demystifies communication for field teams and, in doing so, renders a great service to high-tech companies. Its simple tools and processes promote productivity and effective business results. Best of all, it illustrates how essential and critical it is for engineers to contribute to the technical-commercial success of their organizations. Companies spend a tremendous amount of money training and developing their sales teams— Client Encounters is the ONLY product that I have seen that is effective in developing the "technical sales team"'

Jack Dunnigan

Senior Director, Worldwide Technical Sales, Xilinx

'Client Encounters gives you a set of simple tools that were never covered in engineering school—how to engage and deal with people effectively, efficiently and with great success. I only wish they had been available to me and my colleagues years ago'

Alice Reinheimer, Senior Applications Engineer, e2v

Print version – click this link

Kindle version – click this link

