

DISCOVER-Y Audio #1 Script

Reviewing Client Influence and Influencers Before a Meeting

From the ICON9 Learn As You Go Audio series

Welcome to the first session in the DISCOVER-Y module of the ICON9 Learn As You Go audio series.

My challenge in concocting a small number of examples for DISCOVER-Y is that the possibilities are so many! I have therefore chosen to focus on three of the eight nodes for each of my examples and to vary the examples according to whether the tool is used *before, during* or *after* the client account.

We will look at specific cases, but please note that DISCOVER-Y can also be used to compile lists of useful questions for *generic situations* and for *particular methodologies*. For example, in the past, I have used DISCOVER-Y to visually present key questions associated with a System Level Selling approach. You can do the same for your typical encounter situations and for the methodology that you employ. This will give you a *pictorial representation* that can be easily referred to and shared which, I find, is much more helpful than, say, a spreadsheet list.

Right, let's get back to today's example. We'll follow the usual 3-step process where I'll start by suggesting an example, then lead you through one of your own.

I have chosen a call with a couple of engineers who are going to evaluate my product. They work in the French production facility of a huge, international corporation, and the product they are evaluating is a multipurpose robot.

My main objective, for this call and others that will follow, is to have them fully understand how to train and run the robot. If they can do this, then the evaluation is likely to be a success, and we can be optimistic about getting sales not only in the French factory but elsewhere in the world.

Other important objectives are to minimize interference in the evaluation from other parts of their company and, in the other direction, to maximize the positive influence the evaluation work has on other production units.

My boss and I therefore decided, while discussing the upcoming call, to spend some time on zones three, four and five of the DISCOVER-Y diagram.

Zone three represents the two French engineers in this case and, as we discuss them, we ask ourselves about their level of autonomy. Having mulled it over, we decide that, in spite of not being very senior, they are independent-minded and capable of taking their own decisions. This is a good thing for us as they could be good advocates of our solution one day!

We then consider zone five, which contains the people and organizations connected to our two clients – the people they might influence and the people that might influence or control them. There are three main ones: a Central Robotics Group, situated in company headquarters in the USA; other production units, especially in America, that are working with our competition; and their boss, who is based in the UK.

For simplicity's sake, I won't go into more detail about the people and organizations in zone five, though you can imagine that a lot could be said about them. Instead, let's look at zone four, which represents the relationship between the client and the members of zone five.

A useful habit when considering the even, relationship zones in the DISCOVER-Y diagram is to consider Perceptions, Concerns and Expectations. Again, we don't have time to do this exhaustively, so let's just pick out a couple of interesting things in zone 4.

How might a Central Robotics Group in the USA *perceive* the independent efforts of a French production group to find its own robotics solutions? Are they aware of it at all? If so, what do they know about it? It's easy to imagine that they would be *concerned* about losing their central control over robotics technology. *We should find out more about this relationship* from our French clients, in case the influence of the central group could affect the evaluation and subsequent events.

As for the other production units, assuming that the evaluation goes well, it's likely that our French clients will need help positioning our solution to their colleagues abroad.

Finally, we need to keep our clients' boss in mind. Let's find out when and how they'll be communicating about progress with him and do what we can to monitor and influence that communication.

That's my example. You can perhaps see that DISCOVER-Y played the role of a *catalyst* in our discussion. It does not interfere – by imposing an agenda or “to do” list – but it does provide an excellent skeleton on which the conversation can grow.

Now, I suggest that, in your example, you also consider a case where DISCOVER-Y is used to support a pre-encounter discussion of client influence and influencers. *Who is the person or group concerned?* Just think about it, and write it down if you wish.

<pause>

And are you calling or are you meeting face-to-face? Again, just bring this to mind, and write it down if it helps.

<pause>

What's the context - what led up to this point, and what could follow?

<pause>

For zones 3 and 5, what are the most important points about the people and organizations involved?

<pause>

What are the key perceptions, concerns and expectations that your clients may have about members of zone 5?

<pause>

Conversely, what are the key perceptions, concerns and expectations that members of zone 5 may have about your clients?

<pause>

Finally, what are the benefits of bringing these points to mind?

<pause>

I suggest, for the last point, that one benefit is that it *primes us to look out for the actual perceptions, concerns and expectations* of the people concerned. By *sensitizing* us to these points, it makes it easier for us to notice any tell-tale signs that pop up during conversation.

Be careful not to assume that careful preparation gives us all the answers! All it does is help

us question better and listen more attentively. Real answers come from the encounter itself.

Talking of which, in the next session, we'll look at using DISCOVER-Y *during* a customer meeting.

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