DISCOVER-Y Audio #3 Script

Understanding Client Project Priorities During a Meeting

This script is from the ICON9 Learn As You Go Audio series.

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

Today we'll look at the use of zones 3, 8 and 7 *during* a meeting to help us understand our client's project and their priorities for it. We'll follow the usual 3-step process - I will start by suggesting an example, then lead you through one of your own.

I am going to choose a call with an engineer who is using our software tool to design and simulate a new microprocessor. It's a six–week trial, after which they will decide whether or not to adopt the software.

While my client is keen to have a detailed zone–seven discussion, to learn about all the tool features and options, I have important discovery goals to take care of also.

Of course, some of these are in zone seven too. For example, I need to understand the specification of the microprocessor, to be sure that our software can cope with it and so that I can provide relevant information. But I also need to find out more about zone three – the client himself. I might ask, for example:

“Do you have a mainly hardware or software background?”

"What's your role when you are not stuck evaluating our software? ☺”

Zone 8 is even more important, since this describes my client's attitude to the project. I might ask, for example:

“How long have you been working on this design?”

"What's your experience with tools like this?"

"How much time will you be able to dedicate to this work?"

"From your point of view, what's the most important feature of the software?”

"And what you think about the design flow supported by the tool?"

Clearly such questions have to be fitted into the conversation in a natural way. Assuming that this is skillfully done, you can see that they could reveal valuable information about my client's opinions, priorities and so on.

Now for your example.

Imagine that you are in a technical discussion with a client. What is the situation and who is there?
<pause>

For zone 3, what is there to know about the customer (or customers) themselves?
<pause>

What could you ask, at some point, to elicit some of this information? (just an example of one or two simple questions)
<pause>

I'll skip zone 7, as I am sure you have plenty of practice of asking for details about products, projects and technology. Let's move straight on to zone 8 which, as you know, describes the relationship between the client and all this stuff. Hence, perceptions, concerns and expectations are key things to consider.

For 'perceptions', how might you ask about the client's experience of something in zone 7?
<pause>

Similarly, how could you ask the client's opinion of something in zone 7?
<pause>

For 'concerns', how might you ask about something in zone 7 that the client depends on?
<pause>

For 'expectations', how could you ask them about the importance or priority of zone 7 stuff?
<pause>

That will do!

These are the kind of questions that can add a lot of value to a client encounter, since they harvest information that is rarely obtained when the conversation stays right inside zone 7. It's not a question of going into a meeting with a checklist of things to ask. It's more about mental agility, and the DISCOVER-Y picture is there to help with that, providing an image of where a conversation could be taken next.

In the next audio session, we'll look at how DISCOVER-Y can help us present the harvested information at the post-encounter debrief.