

PURPOSE: This tool will help you to develop a series of *consultative questions* to gain more valuable information from your customer and a better understanding of their needs and goals.

WHEN TO USE: Use this tool in your first discovery meeting with your client. Fill the spaces below.

TYPE OF QUESTION & DESCRIPTION

The Current Situation – Start by getting the prospect/customer to tell you about their company.
Formulate Your Question(s):

The desired (future) situation – Get him or her to tell you about their company's future plans.
Formulate Your Question(s):

The buying decision-making process – Understand how *buying decisions* are made in each company, who is involved, and what their roles are, allowing you to know how to proceed.
Formulate Your Question(s):

The competitive situation – Ask expanding, and open-ended questions to uncover what your customer likes and doesn't like about using their current supplier.
Formulate Your Question(s):

Time and budget considerations – It is important that you learn of any short and long lead times or budget parameters, so that you can foresee opportunities or hurdles that must be overcome, and expand your solutions accordingly.
Formulate Your Question(s):

Company politics – Knowing how the informal organization works within a company is often valuable information in the buying cycle.
Formulate Your Question(s):

Customer's success criteria and expectations – Get the customer to identify their company's real needs to measure the success of your solution and impact on their business.
Formulate Your Question(s):