Open

Exchange pleasantries. Ask approval to take notes/record the call. If applicable, ask if they reviewed the asset that was included in the calendar invite or pre-call email.

ACE

Orchestrated the call, check the time, set the end goal, and engage:

- **A**ppreciate: Appreciate you taking the time
- **C**heck time: Are we still good for 30 minutes? (ask everyone)
- **E**nd goal: Typically at the end of this call, we agree to...
  Ask: Does that sound right?

How to prepare:
- Determine what the outcome of the meeting is
- How to prepare:
  - Review LinkedIn Profiles
  - Include asset in calendar invite or email

Figure 1: Progression of a diagnose call
**Agenda**

- Confirm the agenda
- Ask attendees: **What else would you like to get out of this call?**
- Involve everyone: **How about you Jenny?** and repeat
- Then ask: **Is there anything else?**
- Ask: **What is the most important to you?**

**How to prepare:**
- Send calendar invite
- Include an executive brief
- If multiple attendees, ask your coach to brief you
- Reconfirm the meeting

**Ask open and closed questions**

- Use closed and open-ended questions to engage and pace
- Closed: **Do you have people working for you?**
- Closed w/ context: LinkedIn shows that you have 12 people in Marketing working for you...did I get that right?
- Open: **How do you communicate with each other?**
- Open w/ context: Jennifer mentioned you were using CRM “X” to communicate; how have you seen the team leverage this?

**How to prepare:**
- Do your research
- Prepare your first group of Situation and Pain questions in Closed / Open format

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**Figure 2: How to use SPICED in your diagnosis**

- **S**ituational question
- **P**ain questions
- **I**dentify Impact
- **C**ritical Event
- **E**stablish a Critical Event

**Help the decision process:**
- **S**torytelling
  - **I**dentify Impact
  - **C**ritical Event
  - **E**stablish a Critical Event
  - **S**ummarize

---

**Diagnose by probing using Situation and Pain questions**

- Ask 2 to 4 **S**ituational questions using context
- Ask 1 to 2 **P**ain/problem questions
Summarize
- Summarize: So you have S and S causing you P?
- Ask: Did I get that right?

3rd Party Story
- Empathize: I hear this a lot or You are not alone
- Refer to a 3rd party: Mike, a VP like you had the same...

Impact
- Identify impact on the business: ↑revenue, ↓cost, improve Customer Experience, improve User Experience
- How does this impact you? or How does this impact your business?

Critical Event
- Establish a Critical Event: When do you need this by?
- Followed by: What happens if you miss that date?

Decision
- Decision - Criteria and Process: What is the trade-off you are making... Have you bought a solution like this before?

Next Steps
- First: Did we address your questions?
- Follow up on ACE: At the beginning of the call, we said...
- Close: May I ask, are you ready to move forward with...

Wagons
- Orchestrate the outcome of the next meeting: What would you like to achieve with...
- Then suggest to involve others to accomplish that:
  ○ Would you consider inviting...
  ○ Other customers similar to yourself found it of benefit to invite...

Follow through
- Immediately follow through with deliverables and/or confirm in an email what was discussed

How to prepare:
- Prepare a list of diagnostic open- and closed-ended questions
- Find a case study that is relevant for your customer
- Prepare a list of possible Impacts
- Prepare a list of Critical Events that may apply
- Listen carefully/prepare a comparison table
- Prepare what to ask for!
- This should be aligned with your ACE opening
- Research the people you think should be in the next meeting
- Follow up immediately

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