



Figure 1: Progression of a diagnose call

▶ 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.

How to prepare:

- Review LinkedIn Profiles
- Include asset in calendar invite or email

▶ ACE

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

- A Appreciate:** Appreciate you taking the time
- C Check time:** Are we still good for 30 minutes? (ask everyone)
- E End 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

▶ 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

Help the decision process: go for Impact or Critical Event first?



Identify Impact **I**



Establish a Critical Event **CE**



Storytelling

SUMMARIZE

Allow the customer to share their pain points



Pain questions

Use context to allow you to get to the point faster



Situational question



Situational question

Figure 2: How to use SPICED in your diagnosis

▶ 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?

How to prepare:

- Prepare a list of diagnostic open- and closed- ended questions

▶ 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...*

How to prepare:

- Find a case study that is relevant for your customer

▶ Impact

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

How to prepare:

- Prepare a list of possible Impacts

▶ Critical Event

- Establish a **C**ritical **E**vent: *When do you need this by?*
- Followed by: *What happens if you miss that date?*

How to prepare:

- Prepare a list of Critical Events that may apply

▶ Decision

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

How to prepare:

- Listen carefully/prepare a comparison table

▶ 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...*

How to prepare:

- Prepare what to ask for!
- This should be aligned with your ACE opening

▶ 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...*

How to prepare:

- Research the people you think should be in the next meeting

▶ Follow through

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

How to prepare:

- Follow up immediately

ADDITIONAL RESOURCES FROM



**Videos available on
[the WbD YouTube Channel](#)**



**Additional open source
templates can be accessed at
www.thescienceofrevenue.com**