

SPICED Across the Customer Journey

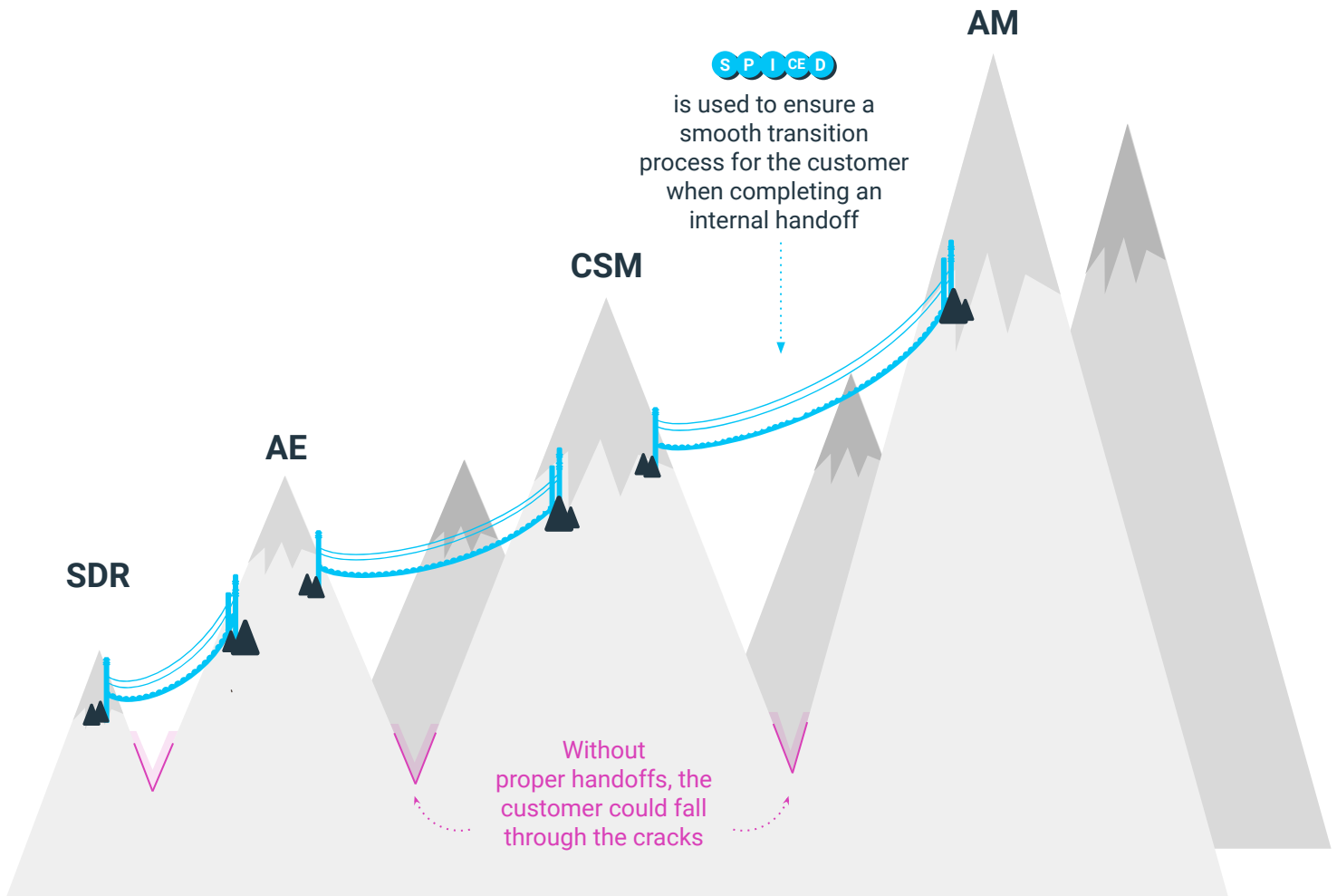


Figure 1: How to use SPICED as a bridge across the customer journey to maintain a consistent experience

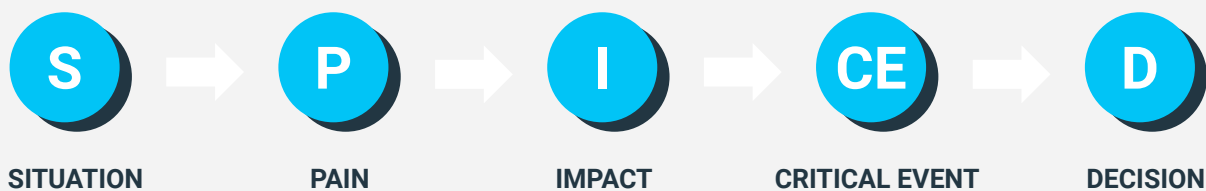
Customers interact with multiple teams and individuals throughout their journey with your company. Any time a customer transitions from one contact at your business to the next, there's a risk: will your customer have the same wonderful experience with those new individuals that they've had so far? Or will they fall through the cracks? Having a smooth internal transition process between your teams can act as a bridge to ensure that customers have a seamless and consistent experience, regardless of who they're talking to.

The impact of a strong internal transition versus a weaker one can be immense. When internal transitions are done poorly, the customer may feel like they're wasting their time and money with a disorganized company, planting the seeds for buyer's remorse and even churn down the road.

When internal transitions are done well and consistently, they set the stage for a deep and long-lasting relationship with the customer, leading to growth from renewals, expansion, and also referrals. Customers who have a great experience with you not only want to continue working with you, but they also tend to tell their friends and colleagues about your solution. As a result, those people may become your customers too.

Having a consistent structure for sharing information across your organization is the best way to transition accounts between teams and team members. Every SDR/AE/CSM/AM relationship is different, but having a consistent language and style of capturing information across teams will avoid miscommunication and save time. Best of all, it creates that bridge to ensure that customers have a great experience with your company.

The **S P I C E D** Framework for Handoffs



► **Situation: Efficient context-setting in less than 30 seconds**

The first step in any successful transition is to break down customer information into separate components. Whether you're on the giving or receiving end of the customer handoff, capturing information in a logical order will help anyone in your company understand the customer's situation in just a few seconds.

Standardize this process so that everyone on your internal teams uses the same terminology and structure.

Examples of Situation questions to cover:

- What's the situation you uncovered about the customer?
- What's happening in their world that led them to your solution?
- What industry are they in? What do they sell?
- Who are their customers?
- How many employees do they have?
- What is their average contract value?
- What is their revenue?

► Pain: Why they care

Research and prospecting fulfill a critical role in identifying and understanding the pain a customer is experiencing. We find pain by listening to what the customer verbalizes and then asking questions to uncover what's beneath what they're saying – and why they're saying it now. Capturing what you learn about their pain allows everyone who works with this customer to align on what the customer wants to improve.

Prioritize this pain in the notes, so your team knows where to start the conversation without asking the customer to repeat what they've already told you or another team member.

This is critical: there is nothing worse from a customer's perspective than feeling like they've already completed an explanation of their pain, only to be asked the same diagnosis questions again. Whenever customers hear something generic, especially after they've explained their specific pain and goals, they get frustrated because it gives them the impression that their last call was a waste of time.

Before speaking with a customer, summarize what you know and add context or research to your questions instead of asking generic questions that force them to rehash known information. Have a clear idea of what the customer said and focused on previously so you start off looking like a rockstar!

No context, low-quality question

"I heard a lot of information from Jon, but I'd love to hear it from you. What are some of the top things you're struggling with?"

Question with context to show you've done the transition internally

"Jon mentioned to me that the top pain you're looking to solve is consolidating your information into one dashboard so your team has the ability to prioritize your top customers. Is that right?"

► **Impact: What they want to get out of partnering with you**

Success in recurring revenue businesses depends on helping your customers reach their desired impact. During transitions, impact is the crux of why you're partnering with your customer. The impact is the desired outcome they're looking to achieve, and this can be a combination of rational and emotional impacts. Rational impact typically occurs at the company or functional level; it often involves revenue growth or other financial impacts, such as cost savings. Emotional impact is usually felt at the personal level; it may include things like getting a promotion or being seen as a leader in the company.

You may not get the chance to uncover impact during every call, but you can listen for cues in every conversation. For example, when a customer tells you, "*If we're able to solve this, it would help us achieve...*" this is golden information that everyone on your team should be aware of. Remember, you don't always have to uncover new impact in every conversation, but you must be attentive and listen to hear if it's there.

► **Critical Event: Their timeline**

A critical event is the timing that drives everything the customer cares about. Think of it as a deadline that has consequences if missed. Identify critical events by asking questions and listening for what happens if the customer does not achieve their desired impact on time. You can ask, "*What would happen if you don't achieve X by a certain date?*"

If they answer, "*It's no big deal. We've been like this for five years...*" then it's not a critical event. A true critical event might sound something like, "*If I don't do it by September 1st, my job is on the line, my team's job is on the line, and we might have to go through layoffs.*"

Be opportunistic when you hear your customer mention anything about time. When a customer mentions they're looking to achieve something by a certain date, mirror their language and ask why that's important.

As you continue a partnership with customers year after year, both impact goals and critical event timelines should be updated to align with any new executive priorities or changes in the direction your customer is heading. Make sure to keep in touch with multiple executive stakeholders to learn how your partnership aligns with new business goals. If you become complacent, your competitors may use this as a way to replace you by becoming better aligned with the customer's changing impact goals and critical events.

When you uncover new opportunities or changes in priorities, ensure this information is documented in a central place for all team members working with the customer to access. Of course, if you discover business-critical or time-sensitive information, be proactive and share it with the relevant internal stakeholders directly, in addition to documenting.

► **Decision: How to earn commitment**

To help the customer make a decision, it's essential to verify the steps and people involved in making that decision. This may change year over year as your customer's company scales or your partnership reaches a certain commitment level (e.g., above \$10K ARR). Knowing these steps and sharing them with your team will help you deliver against them faster and more effectively.

For more complex deals, be sure to outline not just the steps but the decision criteria your customer is using to evaluate whether or not to go with your solution, a competitor, or the status quo. If you have a high-velocity deal, documenting the decision process is usually sufficient.



Completing the Internal Handoff

Now that you have your notes in the SPICED framework, how do you use them to perform an easy and effective transition?

If you're taking over a new customer — whether a net-new customer from Sales or an existing customer from a CSM or AM — first review the SPICED notes that are stored centrally for all to access. Second, meet with the person transitioning off of the account to ask questions and discuss any nuances, including the customer's sentiment, expectations, unique or unusual use cases, and any potential surprises that may arise.

This meeting can be synchronous or asynchronous; if scheduling a live meeting is a challenge, try communicating by sending short videos back and forth.

Hold internal meetings before every important customer meeting. This is a powerful way to create an aligned, professional experience for the customer that sets you up for success. This meeting can be as short as 90 seconds for a straightforward transition or as long as 30 minutes if you need to go through the history and strategy of the customer or other complex information.

Give your team concise notes in the SPICED structure. They'll know exactly what to look for, and in 90 seconds they can read and highlight the most important details. You can even record a video on your phone discussing these notes and send it in a quick message to your colleague.

Most importantly, keep in mind that successful transitions are all about consistency, accountability, and a customer-centric mindset. Hold your team accountable for sharing and leveraging each other's notes. Your colleagues will love you for it, and all your hard work will turn customers into raving fans.

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