Getting to Why

Who is this guy anyway?

- 10 years in CS
- 3 CS teams
- 1 unicorn
- w/ ⅔ net new revenue from CS

- 26 companies
- 90 templates
- 1 podcast
- w/ 250 episodes

Getting to Why Makes you More Effective in All Areas of Customer Success

Three Questions

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Which would you invest in?

Team A:
Well funded
Well connected
Ivy League affiliation
Media attention

Team B:
Little funding
Limited connections
No academic affiliation
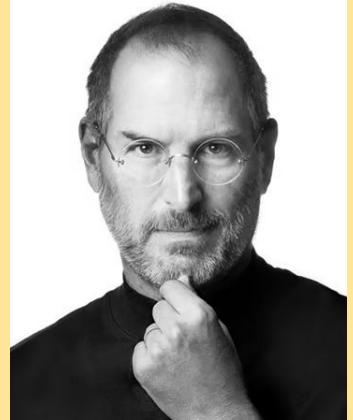No media attention

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What's the difference?

Option A:
We make computers
They're fast and reliable
You should buy one

Option B:
We challenge the status quo
We do this by making computers

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What do these have in common?

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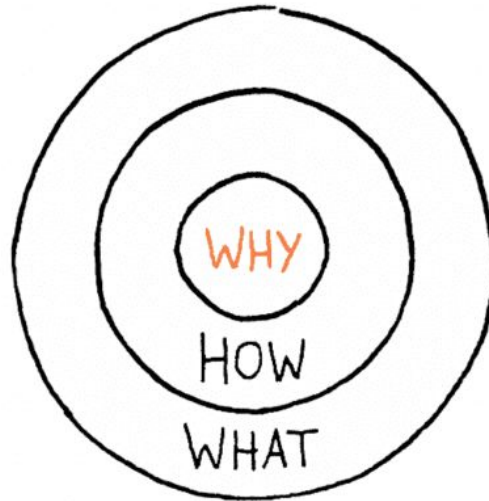

The Golden Circle

WHAT
Every organization on the planet knows WHAT they do. These are products they sell or the services

HOW
Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

WHY
Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.
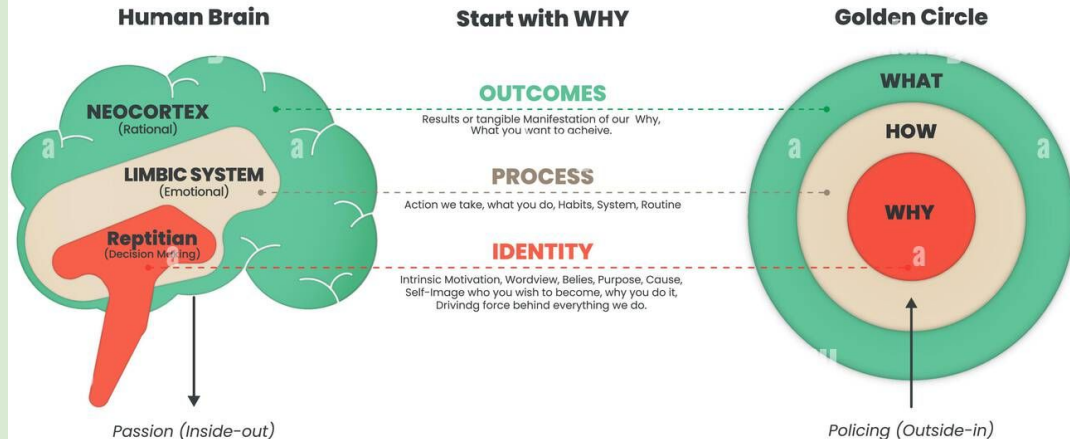
WHY
HOW
WHAT

People don't buy what you do. They buy why you do it.

What's really going on here?

THE GOLDEN CIRCLE AND THE BRAIN
Simon Sinek

Human Brain	Start with WHY	Golden Circle

NEOCORTEX (Rational)

LIMBIC SYSTEM (Emotional)

Reptitian (Decision Making)

OUTCOMES
Results or tangible Manifestation of our Why, What you want to acheive.

PROCESS
Action we take, what you do, Habits, System, Routine

IDENTITY
Intrinsic Motivation, Wordview, Belies, Purpose, Cause, Self-Image who you wish to become, why you do it, Drivindg force behind everything we do.

WHAT
HOW
WHY

Passion (Inside-out)

Policing (Outside-in)

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The Five Whys

Problem: Ran through a red light.

Why? — Late for work.

Why? — Woke up late.

Why? — Alarm didn't work.

Why? — Exhausted battery.

Why? — I forgot to check it.

Root cause

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Why "Why?"

- Root causation
- More effective customer conversations
- Better interdepartmental relationships

Workshop

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Application: Mastering Intros

Option A:
My job here is to manage your onboarding and be a point of escalation for support

Option B:
I'm here to be your strategic advisor in the industry. My purpose here is to turn your purchase into real business value

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Aim to understand why the client is in business in the first place and why they're taking the call at all. For example, it's meaningfully different to onboard a customer who is just starting out versus two years from retirement and looking to sell their practice.

Application: Onboarding & Goal Discovery

Scenario A:
"I bought your software for less expensive leads"

Scenario B:
"I bought your software because I'm struggling to stay competitive."

Or deeper: "I'm struggling to stay competitive because I don't provide a good client experience"

Recommended Questions:
"What are your main challenges today?"

"What would this look like as a solved problem?"

"Why is this goal important to you?"

Use the SOON Funnel

The SOON Funnel

Top Discovery Questions

- What brought you to the call today?
- What would make this a win for you?
- What major initiatives are you working on this year?
- What's a bad day look like right now?
  - *Pro tip: Ask them to share their screen!*
- If you had a magic wand, what would success look like?
- Why hasn't this been solved already?

- What options have you tried?
- What happens if you do nothing? (Cost of Inaction)
- What if you had to double that goal—how would you handle it?
- What would it mean for you personally if we solved this?
- What's the internal approval process for a project like this?
- Does this really sound like a good fit?

Application: Feature Requests

Scenario A:
"I need urgent tasks to turn red"

Scenario B:
"I need to make sure we hit deadlines. I need to save time and effort for my people."

The "why" approach allows for a more open-ended conversation, enabling you to explore various features or solutions within your product that align with the customer's core motivations.

By understanding the "why" behind a customer's feature request, you can gain insights into the customer's underlying needs and motivations. This empowers you to have a more meaningful and targeted conversation, offering tailored solutions that address the customer's desired outcomes.

Application: Feature Requests

Scenario A:
"I need [Product] to allow for more quotes in the same view"

Scenario B:
"I need to save time and effort for customers who are shopping. They would no longer have to go to each insurance company's website individually to get a quote."

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Digging Deeper

Note: Be mindful of frustrating customers

"I think I follow, but want to confirm – in what scenarios is that most important to you?

"What does that mean to you?"

"Can you share some examples?"

"Ah, I see. So just to repeat that back to you…"

Application: Non-responsive Customers

Scenario A:
"I'm just too busy"

Scenario B:
"I'm slammed with trying to get new business"

Vs. "I'm stuck in the weeds trying to contract out deals"

Vs. "I just had an employee leave"

Recommendations:

Super simple:
Ask why it's a bad time

Ask "Have you given up?"

Tips from Chris Voss

Application: Cancellation Handling

Scenario A:
"It's just not worth it for me to remain a customer"

Scenario B:
"It's too expensive"

Vs. "I don't see the value"

Which allows for more "whys"

Recommendations:

Use the "Five Whys" and think like a five year old

Ask "What would it have taken to keep you?"

Application: Selling value, not F words

SELL ME THIS PEN

Option A:
"Check out our new tool"

Option B:
"Are you looking to improve your client experience and win more leads?"

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Not all "Whys" start with "Why"

"What brought you here today?"
"What obstacles are you facing?
"What does success look like to you?"

"What options did you evaluate?"
"Can you tell me a few specific scenarios where [Product] will make a difference?"
"Where does [Product] sit within your long-term vision?"
"Tell me more about that"

Welcome to the Worst QBR You've Ever Had

In front of you are two doors

Each door has a guard (a stakeholder)

- One door leads to freedom and renewal
- One leads to life in prison & infinite churn
- One guard always tells the truth
- One guard always lies
- And you don't know which is which

You get to ask one question to one guard to figure out the safe door. What do you ask?

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"If I were to ask the other guard which door leads to freedom, what would they say?" (And do the opposite)
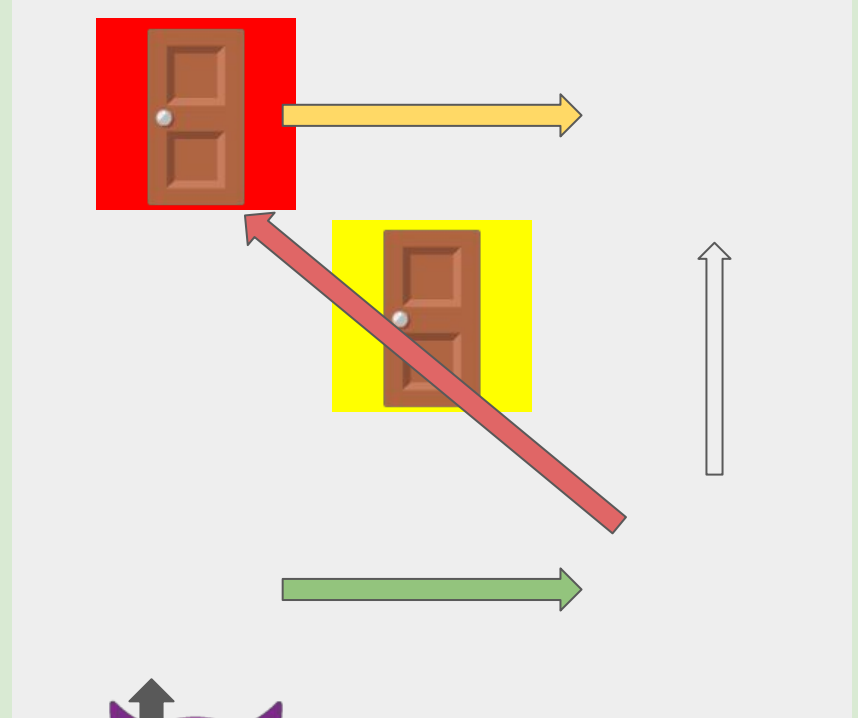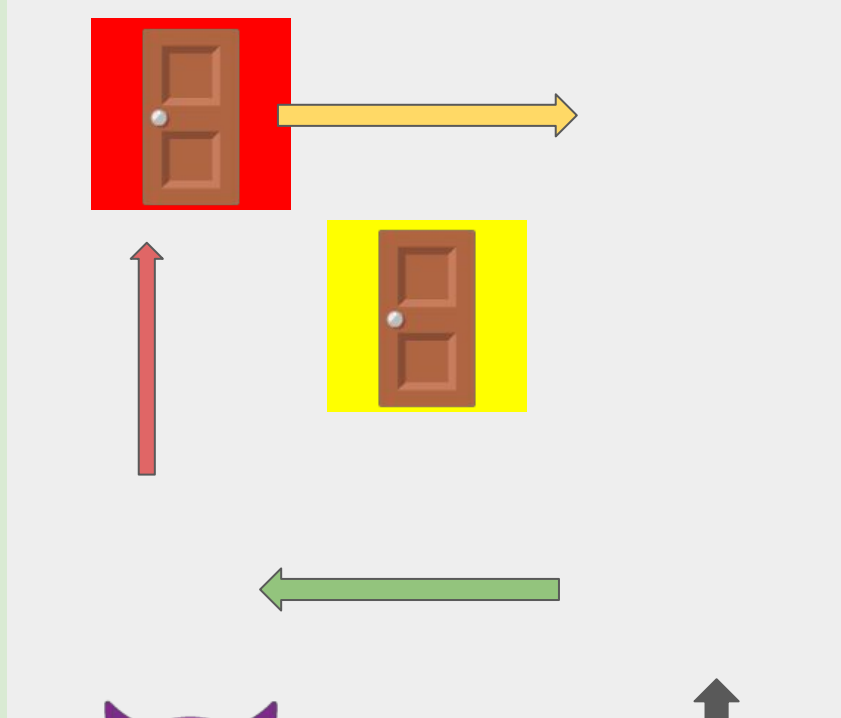
The Resolution

Ask one guard: "If I were to ask the other guard which door leads to freedom, what would they say?" Then, pick the opposite door.

If you ask the truthful guard:
- They truthfully report what the liar would say.
- The liar would point you to the wrong door.
- So the truthful guard also tells you the wrong door.
- That means the correct door is the other one.

If you ask the lying guard:
- They lie about what the truthful guard would say.
- The truthful guard would point to the correct door.
- But the liar twists that answer and tells you the wrong door.
- Again, the correct door is the opposite one.

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Think: What other applications can you find?

Example: What is the difference between usage and adoption?

What other "whys" does your product or service solve?

Take-Home Exercise: Why Scavenger Hunt

1. **Pair Up**:
   - Each person will be assigned as *Person 1* or *Person 2.*
   - *Person 1* starts with a statement (e.g., "I need better access to customer insights.")
2. **The Goal**:
   - *Person 2* must uncover *Person 1's* true motivation (the "why") behind their statement.
   - The aim is to identify the "why" in **five questions or fewer**.
3. **Rules**:
   - *Person 2*, ask simple, direct questions to get to the root reason. Aim to use as few questions as possible.
   - *Person 1*, give clear, straightforward answers without extra details.
4. **Locking In**:
   - *Person 2* can "lock in" their answer at any point if they feel confident they've uncovered the true reason.
5. **Debrief**:
   - After the round, we'll share reflections as a group
   - Which questions worked best? What insights were surprising?

Example

- **Example Q&A**:
  - **Statement**: "I need better access to customer insights."
  - Q1: "Why do you need better access?"
  - A1: "To understand customer needs faster."
  - Q2: "Why is it important to understand them faster?"
  - A2: "So I can respond to their concerns in real-time."
  - **Lock In Guess**: "To improve response times and boost customer satisfaction."

Next Steps

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