

Have a useful customer conversation

01

Listen and learn



02

Reflect and agree



03

Follow through

<https://wealthexperiment.live/sales-skills/>

The person I hope to help:

The problem I think they have (an assumption until checked):

What I know from observation:

One open question to start:

LEARN

The last time this problem happened:

What they tried:

What became difficult:

What a useful outcome would look like:

Constraints, preferences and other people involved:

REFLECT

My summary of what matters:

What the person corrected:

FROM LISTENING TO FOLLOW-THROUGH

Agree a useful next step

RECOMMEND ONLY IF USEFUL

One bounded next step:

What is included and excluded:

Effort, price and handling/access terms to agree:

How we would check whether it helped:

FOLLOW THROUGH

What I promised:

What I delivered:

Whether the original need was met:

What remains unresolved:

A new need, only if relevant:

DECIDE

Proceed / learn more / change the plan /
pause / decline:

Agreed next action:

Owner:

Preferred timing and channel:

LEARN FROM THE EXPERIMENT

Actual revenue:

Actual expenses:

Hours spent:

What I learned, including reasons people
declined:

One thing I will change:

KEEP THE CONVERSATION RESPECTFUL

A good conversation can end in a respectful no.
Keep private customer details in appropriate, approved systems.

Questions or help applying this to your project? Email info@waymaker.cx.