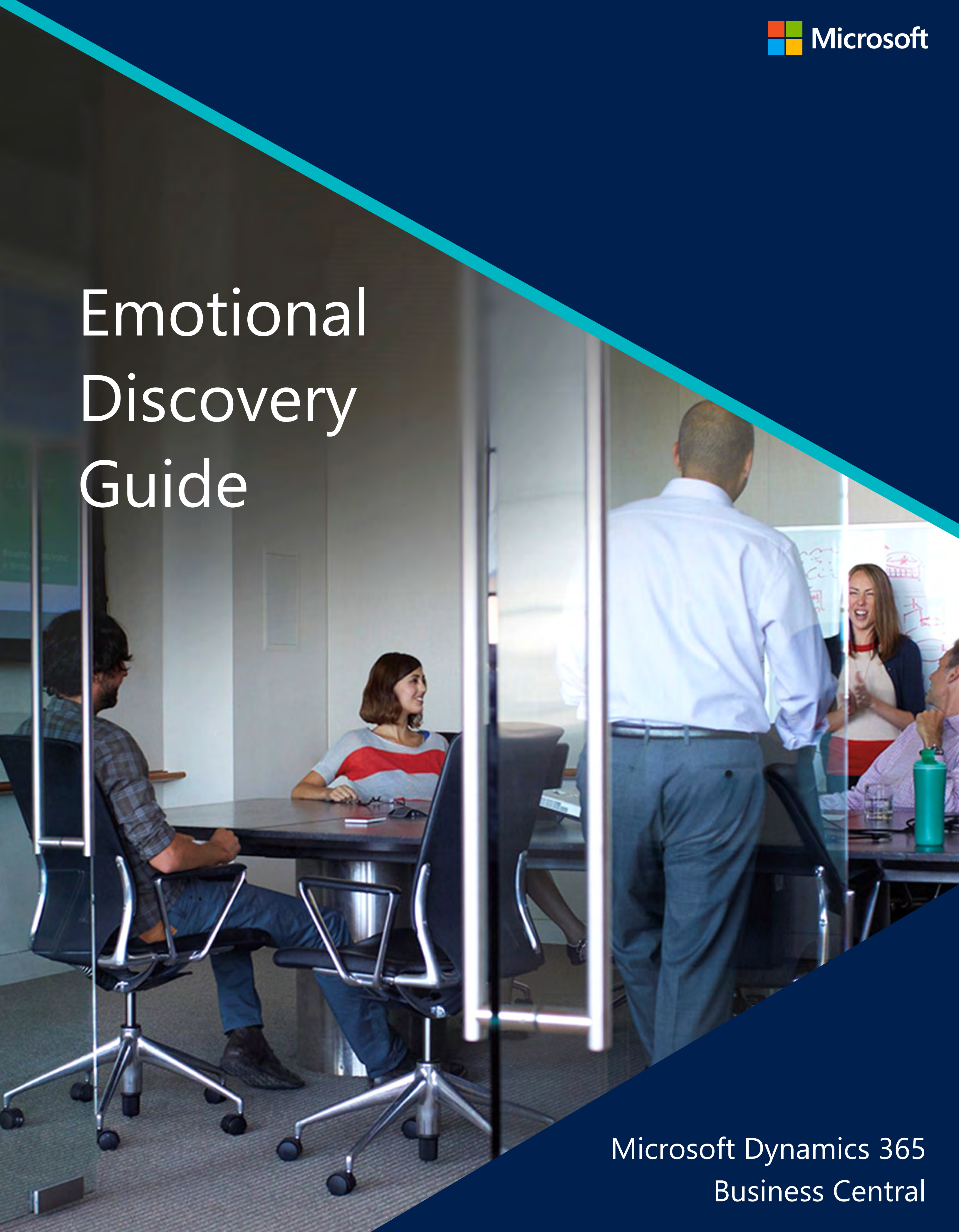
Emotional Discovery Guide



Microsoft Dynamics 365
Business Central

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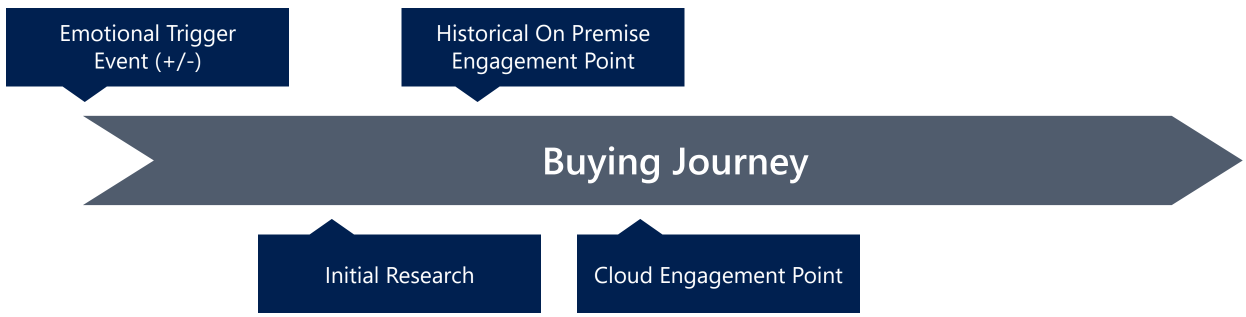
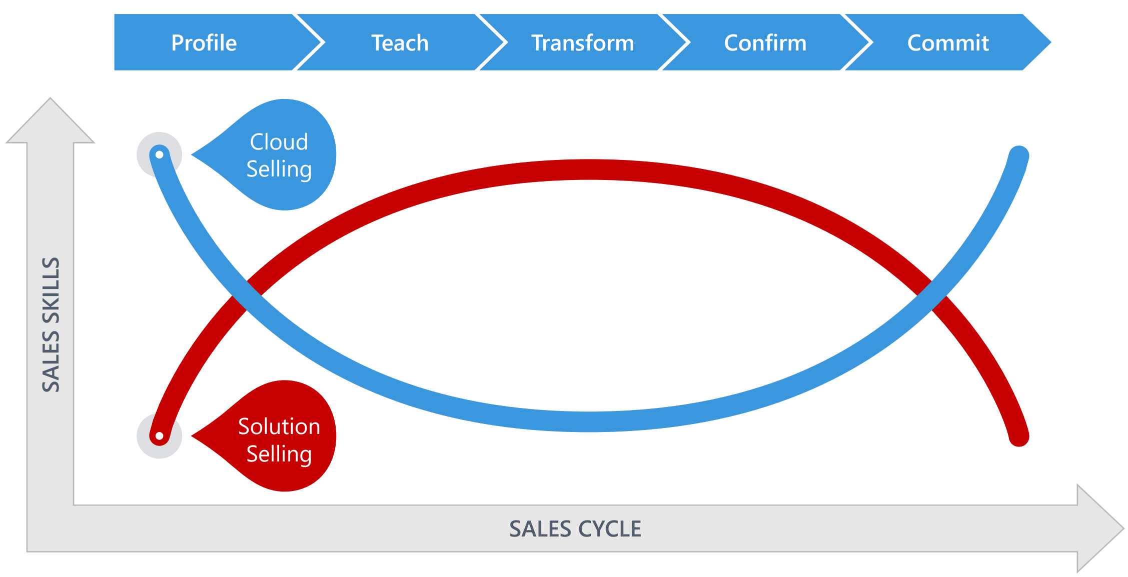
The Cloud Promise

Prospects researching cloud applications increasingly expect turnkey, industry-specific solutions that can be rapidly deployed with minimal customization.

Increasingly, the information required to make informed, short-list decisions is readily available on the Internet, enabling your prospects to complete most of their analysis online, or with the support of a 3rd party consulting firm. As a result, selection teams delay engaging with sales professionals until late in their buying journey.



These conditions make your initial **Profiling** calls some of the most important conversations of the entire sales process. Why? Because while most selection teams have completed 57% of their buying journey before reaching out to vendors, your sales process has only just begun. You need to catch up quickly to create a Microsoft bias.

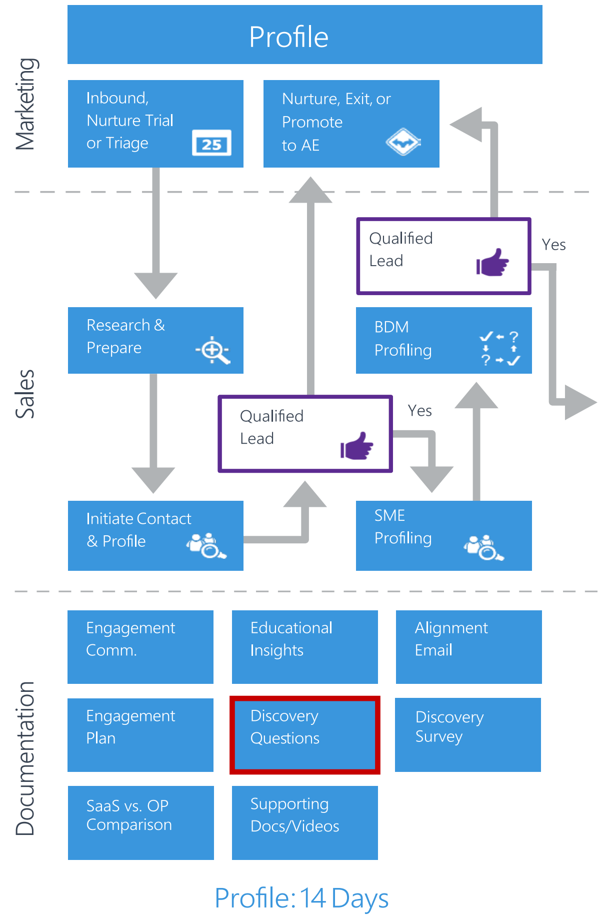


To do so, you need to develop strong discovery and objection-handling skills at the beginning of the engagement cycle (as well as at the end).

Facilitating a memorable and mutually beneficial Profiling experience requires much more than a long list of open-ended questions. To make an impact you need a business-level understanding of your focus industry or workload, a structured discovery process, and clarity into what will emotionally engage your prospects.

The What, How and Why of Effective Profiling

The primary objectives of the **Profile** phase are 1) ensuring prospects satisfy your organization's high-level qualification criteria, and 2) collecting the information required to manufacture a **Strategic Tipping Point** moment during the **Anchor** phase engagement activities. To meet these objectives, you should ideally facilitate up to four separate discovery conversations for complex opportunities (as outlined below) or a minimum of two for repeatable, accelerated opportunities.



First Things First - Lead Triage

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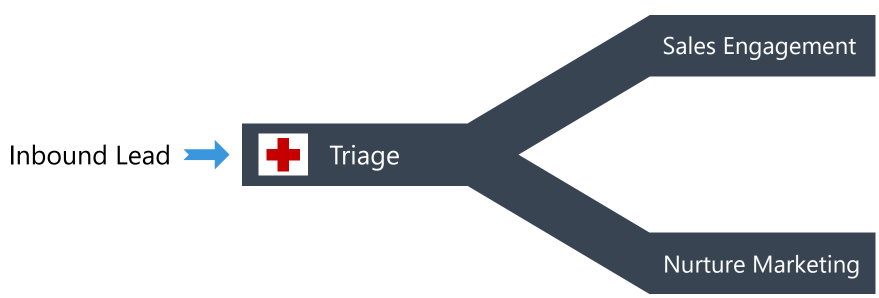


To avoid this time-wasting scenario, marketing organizations with a sufficient volume of inbound traffic must dedicate a "triage" resource to this critical activity. Most importantly, this resource must be able to carry competent industry conversations with three prospect personas: "what" (project lead/IT), "how" (subject matter expert/line of business), and "why" (business decision maker/CFO). As this conversation is often the prospect's first "live" vendor interaction, the discussion must be insightful, engaging and memorable.

Project & Process Discovery – The "What"

Project leads are typically your first point of contact on a new opportunity as they are primarily responsible for managing both the selection process and the vendor relationships. Therefore, the objectives of your first call are:

- confirm the prospect satisfies your organization's initial lead qualification criteria
- identify the prospect's primary project objectives and business drivers
- provide the prospect with an educational insight that surprises them and/or triggers their curiosity
- credential your organization in relation to the prospect's industry and (more importantly) your ability to impact their project drivers and key operating metrics
- identify the prospect's selection process and solution criteria
- secure access to the project SMEs and BDM for additional discovery calls

Business Process Pain Discovery – The "How"

Subject matter experts (SME) and/or line of business (LOB) stakeholders are the ultimate business process owners, and heavily influence the decision-making process. They were specifically chosen to participate in the project because of their deep understanding the day-to-day operations of their area of responsibility. The objectives of the SME/LOB discovery calls are:

- develop a clear understanding of each SME's business and operational challenges (e.g., finance, supply chain, manufacturing, production scheduling, sales, marketing), their desired solution capabilities, and their role in the project
- clearly communicate your organization's industry experience (through content, not claims)
- identify any anticipated LOB-specific demonstration elements the SMEs feel are critical to the selection process
- identify any SPECIFIC concerns and/or objections the project team has with your organization or offering

Business Case & Risk Discovery – The "Why"

Most BDMs will eventually make themselves available to you during the selection process, but rarely in the early stages of the vendor engagement cycle. BDMs prefer to have operational employees or project leads manage early vendor interactions, both to maintain the integrity of the selection process and to minimize executive irritation.

Unfortunately, when BDM access is finally granted, sales professionals often bring the wrong discovery strategy to the discussion. BDMs are "why" people. They often have little interest in the "how" (operational improvements) or "what" (key functional requirements) of the project. BDMs are interested in three core topics: money, risk and control, theredore driving a structured, industry or workload-specific, **emotional** discovery process focused on the source, rather than the symptoms, of the BDM's pain is critical. By doing so you will establish relevance, capture the BDM's attention and benefit from a much deeper level of disclosure. The objectives of the BDM discovery call are:

- develop a clear understanding of the BDM's business challenges, project drivers and anticipated business benefits
- uncover the **primary** business objective driving the project (e.g., growth, spiraling operational costs, new market expansion, integration of an acquired company, regulatory compliance risk, etc.)
- identify the BDM's primary risk concerns (project and business)
- discover the BDM's primary project related control challenges (e.g., reporting, decision-making, forecasting, data access, data integrity, etc.)
- identify when and how the BDM will participate in the selection process

Moving from Logical to Emotional Discovery

Motivating prospects to talk about topics they **emotionally** care about is the key to orchestrating mutually beneficial discovery calls.

Doing so means moving beyond the "what" and the "how" of the project details. Uncovering "why" the project is being funded is the single most important element of **emotional discovery**. "What/how" conversations are primarily **logical** in nature, as they focus on features, functions, requirements, platforms, capabilities and business processes. "Why" conversations are **emotional** in nature, and focus on growth, fear, risk and control. "Why" an organization feels it needs a new business solution is infinitely more interesting and important (to both you and your prospect) than your solution's features and capabilities.

Logical Project Drivers:

- inefficient business processes
- inadequate or inaccurate reporting
- poor integration (islands of data)
- new business or functional requirement
- legacy system replacementa

Emotional Project Drivers:

- growth/expansion
- lost customers/market share
- declining profitability
- lack or loss of control
- declining revenue
- compliance risk
- regulatory change
- financial loss
- new entrant (competitor)

Start with What They Care About!

At the beginning of each engagement process, there is often a disconnect between what sales professionals and prospects feel is most important.

Far too often, sales professionals unconsciously focus their qualification and discovery questions on what **they** care about most. Typically, this has a BANT (budget, authority, need, timing) bias and focuses on functional requirements, selection criteria and solution fit. Prospects, on the other hand, care most about the business challenges that are **forcing** them to replace their existing systems, and the **risks** associated with not choosing the right replacement.

In order of emotional priority, prospects care most about:

1. the business drivers/challenges behind the project
2. the capabilities required to address the business drivers/challenges
3. the strength of the business case
4. potential business and project risks*
5. solution fit
6. vendor selection
7. project cost

In order of emotional priority, sales professionals care most about:

1. budget
2. the selection criteria and process
3. project risk*
4. business case strength
5. functional requirements
6. the compelling event driving the prospect to change systems

* Both prospects and sales professionals care deeply about project risk, but they view it from opposing perspectives. Prospects care about risks that undermine project success: budget/actual variance, business case realization, and business disruption. Sales professionals care about risks that impact estimate accuracy.

To consistently drive meaningful and memorable **profiling** calls, you must document discovery questions in advance that align with your prospects' emotional priorities. Focusing on topics that **emotionally** resonate with your prospects drives greater engagement, increased disclosure, deeper conversations and (ironically) BANT clarity.

The Evolution of Discovery

To consistently draw prospects into emotional discovery conversations, you must plan and prepare in advance.

Level 100 - Open-Ended vs. Closed-Ended Questions

This basic discovery technique is predicated on asking a combination of open and closed-ended questions. Open-ended questions encourage prospects to speak freely and broadly, and they typically elicit longer responses. Closed-ended questions are answered with a single word, or short response. They're used to direct (or re-direct) the dialogue, force a direct answer or regain control of a conversation.

Open and closed-ended questions act as levers that control the flow of information. Pull the correct lever and the prospect shares meaningful project information. Pull the wrong lever and the conversation goes down a tactical or technical path.

With a rich inventory of open and closed-ended questions, you can shift a **logical** discussion focused on IT and functional requirements to an **emotional** discussion focused on business drivers and outcomes.

Open-ended questions start with Who, What, Where, When, Why and How, and are used to:

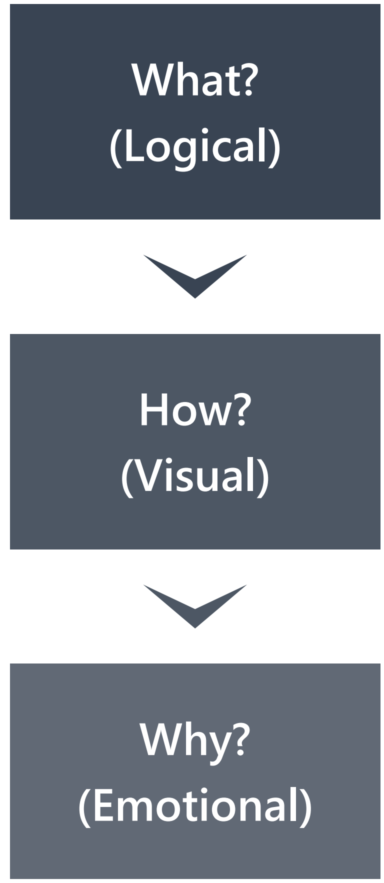
1. quickly engage prospects in conversation
2. identify/uncover what is most important to prospects
3. produce long responses that require deliberate thought
4. ensure prospects speak for much of the discussion

Closed-ended questions start with Do, Does, Has, Have, Is and Are, and are used to:

1. end one line of inquiry and initiate another
2. re-gain control of a runaway conversation
3. secure a definitive answer to a specific question
4. get a direct response from an indifferent or evasive prospect

Level 200 – Emotional Discovery

The human brain processes questions in many ways, and will respond differently based on how a question is phrased. For example "what" questions are typically anchored in information and logic, so will be processed by the cognitive brain. "How" questions are anchored in business processes and motion, so will be processed by the visual brain, and "why" questions which focus on results and emotions will be processed by the limbic system.. As prospects (especially project leads) focus primarily on the functional or operational elements of a business project, you will need to pivot the conversation to "why" topics to drive a deeper level of engagement and disclosure.



To get to the "why" (business pain, trigger event, vision, risk, etc.), you must plan a series of layer 1, layer 2 and layer 3 discovery questions. Sequenced properly, they steer conversations towards emotional topics. The discovery strategy is simple: ask a question, ask a question about the answer to the first question, then ask a question about the answer to the second question. This powerful discovery technique becomes even more effective when the questions are sequenced into a what, how, and why "chain".

Layer 1, 2, and 3 discovery question chains need to be asked in the correct order, which is determined by what is most emotionally interesting and engaging to the prospect. See examples below of layer 1, 2 and 3 discovery question strings that align with emotional prospect priorities.

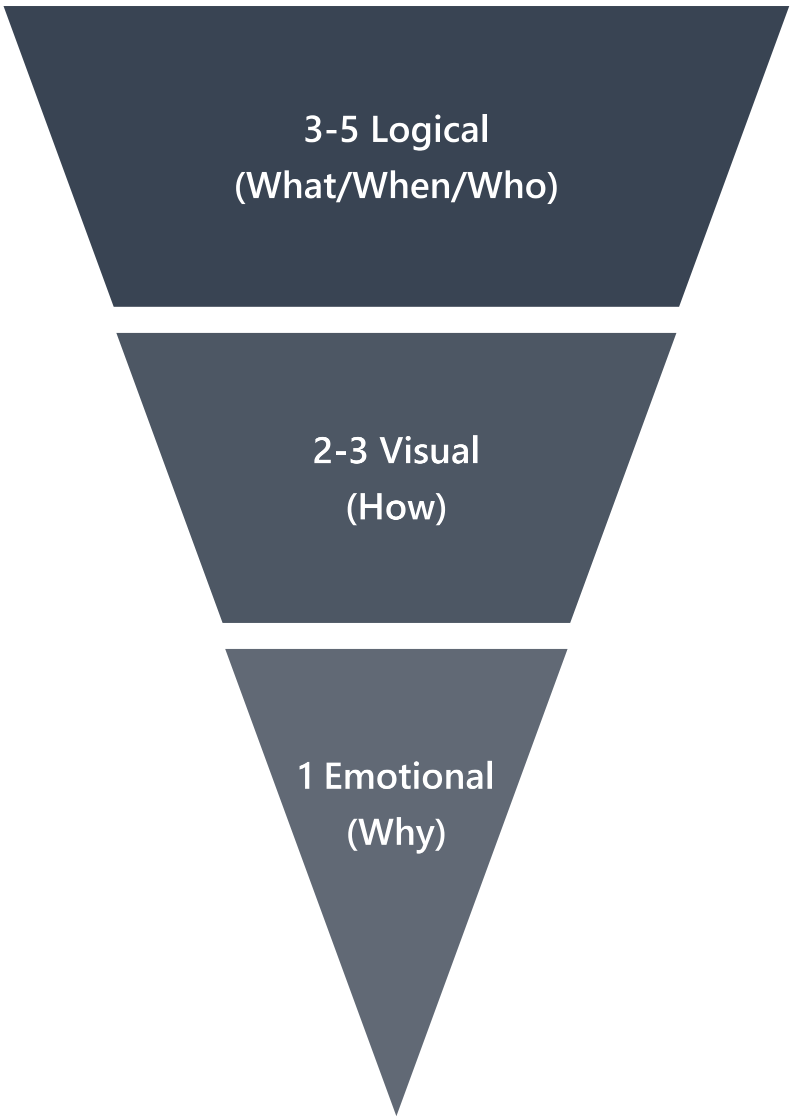
Emotional Discovery			
	Practical (What) Open-Ended Discovery	Functional (How) Refine the Focus	Emotional (Why) Define the Impact
Current Challenges/Pain	What challenge or limitation has prompted your interest in a change?	How is that impacting the business today?	What has kept your organization from making this change in the past?
Required Capabilities	What aspect of your current business system do you find the most frustrating?	How will the business be different after this change?	Why is that so important to the business community?
Business Case/Impact	What would an "ideal" solution do for your business?	How will you prioritize the various requirements?	What is the primary reason/driver behind this initiative?
Potential Risks	What do you feel are the greatest risks or project challenges?	How do you plan on mitigating those risks?	Why is that a specific concern for your organization?
Selection Process	What process will you be following to select a new system?	How did you land on that approach?	Why did you decide to include Microsoft Dynamics?
Project Cost	Can you share with me your high-level budget expectations?	What process did you follow to establish a project budget?	Can you share the main elements of the business case that justify that level of investment?

When you ask a prospect **why** they are looking for a new business application, they often respond with a detailed explanation of the functional or technical deficiencies plaguing their organization. A **why** question is asked, but a **what** answer is provided. Asking questions in a **what-how-why** sequence allows you to transform the discovery experience from a tactical interrogation to an emotional conversation. Business drivers, business case elements and project risks are inevitably surfaced along the way.

Level 300 – Pyramid Discovery

Asking discovery questions in a **what-how-why** sequence inevitably shifts your prospect conversations from logical to emotional topics. The impact can be further amplified by spending more time and energy developing a clearer picture of your prospect's current state (what/how) prior to shifting to emotionally charged topics. You do this by asking 3-5 logical questions, followed by 2-3 visual/process questions, followed by a critical emotional question.

Example:



What prompted your interest in our Microsoft Dynamics 365 Business Central's manufacturing solution?

What are the main capabilities you are looking for in a new MRP system?

Which business processes are most impacted by not having those capabilities today?

What challenges has that created? for the business?

How are you working around those challenges today?

Can you share with me **how** you would like to see production scheduling run in the future?

That sounds like a significant workaround; **why** haven't you replaced your current system before?

What About BANT? (Budget, Authority, Need & Timing)

Collecting BANT information is necessary for accurate forecasting but asking direct BANT questions seldom yields truthful answers. Since three of the four BANT criteria are determined using closed-ended questions (do you have any money? do you have any power? when will the decision be made?), BANT questions inevitably drive an early emotional wedge between you and your prospect. BANT questions turn prospect "interviews" into interrogations, and destroy trust in the process. Money and power (budget/authority) are emotionally-charged topics that must be approached indirectly. To do so, you must change both the questions you ask AND the sequence in which you ask them.

BANT = DEAD

- **D**istrust
- **E**motional Resistance
- **A**voidance
- **D**istance

Formulating industry-specific discovery questions that resonate with your prospects at an emotional level takes creativity. It also takes discipline and the commitment to prepare and execute a discovery process that focuses almost exclusively on your prospect's situation rather than your needs as a sales professional Consistently doing both will result in engagement experiences that drive greater disclosure, higher trust and a higher win rate.

Microsoft