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# **Leading an “Issues and Vision” Discussion with Customers (and Partners)**

Tips for Gaining a Lot of Customer Context  
in a Short Time (and How to Kick Off a  
Customer Scenario<sup>®</sup> Mapping Session)

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Direct link: <http://dx.doi.org/10.1571/ME9-15-05CC>

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By Patricia B. Seybold, CEO and Sr. Consultant, Patricia Seybold Group

September 15, 2005

## NETTING IT OUT

For more than 20 years, we’ve been leading group interviews with customers to gather their issues and concerns on a variety of topics. Our clients have told us that this technique is very useful to them. We are able to generate very high-quality customer information, full of rich context, around customers’ issues and requirements. Customers are also able to articulate and agree upon what they’d ideally like to experience in the future.

In this report, we describe the mechanics of facilitating this kind of discussion with a group of like-minded customers who have been recruited to participate in a customer co-design session. This Issues and Vision discussion is part of our Customer Scenario® Mapping (CSM) methodology.

We often include channel partners along with customers in these group interviews. If your company uses a network of agents, brokers, retailers, dealers, or other partners to serve your end customers, we recommend that you run customer co-design sessions with customers and partners together. It’s a great way to gain alignment around the things that matter most to your customers.

Use this technique to:

- Kick off a Customer Scenario® Mapping session

- Gather requirements and issues from any group of customers who share similar roles and concerns
- Gather issues and future requirements from customers in different roles in a large account
- Gather issues and requirements from customers and partners together (in order to minimize channel conflict)

When you run a customer co-design session using our Customer Scenario® Mapping methodology, you’ll use this Issues and Vision discussion to jumpstart your customer co-design session.

## OVERVIEW OF AN “ISSUES AND VISION” DISCUSSION WITH CUSTOMERS

### When Do You Use a Group Interview around Issues and Vision?

You can use this group interview technique any time you want to gather common issues quickly, to build consensus, and to build a shared mental model of current reality (today state) and vision (ideal state). We’ve been doing group interviews for more than 20 years. Group interviews allow you to gather a lot of information very quickly, while at the same time, seeding strategic conversations.

Whenever you have a set of like-minded consumers or business customers assembled for any

purpose, you should think about using this approach to stimulate discussion and dialog. For example, if you run customer advisory board sessions, host user groups, run focus groups for market research, engage customers in usability testing, and/or visit with customers at their place of business or in your stores or branches, you can use this Issues and Vision discussion format to gather rich context and clear requirements.

This group discussion works well whether the topic at hand is improving how you serve customers, gaining customer input into new products and processes, or shortening time to close sales for existing products and services. Think of using this approach to kick off any customer-impacting project or initiative.

If your company uses a two- or three-tier distribution model to service customers, it’s a great idea to bring end customers together with channel partners in order to build a shared mental model of customers’ issues and vision, along with a model of partners’ issues and vision. The hour or so you invest in this kind of dialog will resolve thorny business issues that may have plagued your firm for years.

### **Always Start a Customer Scenario® Mapping Session with a Customer Issues and Vision Discussion**

In this report, we’ll focus on the use of this “group interview” technique as a critical step in running a customer co-design session using our Customer Scenario® Mapping methodology. (See Illustration 1 for a summary of the steps involved in running a Customer Scenario® Mapping session.)

In the context of a customer co-design session, the customer/partner Issues and Vision discussion is typically a 45-minute facilitated discussion among the customers (and/or partners) who are participating in a half-day Customer Scenario® Mapping session.

We call this particular form of group interview a customer Issues and Vision discussion because it consists of two parts: 1) Customers describe their current pain points and issues in the context of their own lives and/or businesses, 2) You then switch the discussion to get them to focus on their ideal experi-

ences. If anything were possible, what would they be able to do and how would that feel?<sup>1</sup>

### **Who Are the Participants?**

Who are the customers who would be participating in this discussion? Who are the partners?

When you run a Customer Scenario® Mapping session with external customers or clients, you’ll be inviting a small group—from six to 24 customers and/or prospects—to engage with you in this co-design activity. You’ll jumpstart your co-design session by getting customers to share their ideas and experiences and to compare notes using this discussion technique.

If you sell and service products through channel or distribution partners, we recommend that you include these partners in at least some of your end-customer co-design sessions. You can also run separate partner-only sessions to focus on those partners’ specific requirements, but we recommend that you do so after including those partners in a combined session with customers. Why? It will keep both you and your partners focused on streamlining the processes that impact your joint end customers.

If you’ve invited channel partners (distributors, resellers, agents, retailers—the people who sell and provide service to your customers) these partners will enjoy hearing the customers’ common concerns and desires. The partners will also be eager to let you know how they feel, what they need, and to compare notes with their fellow partners about their collective needs and desires. So include the partners in the discussion. But take care to keep the customers’ issues discussion distinct from the partners’ issues discussion. Do the same when you get to the vision part of the discussion. Get the customers to describe their ideal experience first; then ask the partners to contribute their ideas.

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<sup>1</sup> For more information on the philosophy behind our group interview technique, please refer to “Building Buy-In for Customer-Centric Initiatives: Facilitate Group Interviews with Key Stakeholders to Build Trust and Momentum,” Patricia B. Seybold, April 21, 2005, <http://dx.doi.org/10.1571/me4-21-05cc>.

### Activities Included in a Customer Scenario® Mapping Session

Customer Scenario® Mapping (CSM) is a 15-year-old and mature methodology that enables customer-led process innovation. Your customers (and partners) work together to redesign their own ideal processes for accomplishing their desired outcomes with assistance from your cross-functional teams of partners and employees. You co-invent your customers' ideal processes. You learn an incredible amount about their contexts, their conditions of satisfaction, their moments of truth, and how they measure success. Together, you explore ways to anticipate and meet their needs today and in the future. The eight major activities involved in leading a Customer Scenario Mapping® session are:

1. Sponsor kicks off the session and sets expectations
2. CSM Consultant describes agenda and leads introductions
3. **Consultants lead Issues and Vision discussion with customers and partners\***
4. Consultants adjust scenarios and teams as required and provide instructions to teams
5. Customer/Partner/Stakeholder teams map their ideal scenarios
6. Each team shares its scenario story\*
7. Consultant or Sponsor summarizes and solicits customer feedback
8. Sponsor thanks customers and sets expectations re: follow-up activities

*Illustration 1. There are eight major steps in leading a Customer Scenario Mapping Session. The Issues and Vision Discussion is the third step in the half-day session. The steps marked with an asterisk are the ones that should be videotaped so that you can capture the rich context your customers and partners are willing and eager to share.*

Who else will be in the room and how should these other stakeholders participate in this discussion? When you lead an issues and vision discussion as part of a Customer Scenario Mapping (CSM) session, you'll also have a number of people from your own organization in the room. The non-customer/partner participants will include the business sponsor for the customer co-design session, the CSM Consultants<sup>2</sup> who are facilitating the session, as well as a group of stakeholders and subject matter experts from different product or functional groups within your organization. One CSM consultant will lead the discussion. Other CSM consultants will be taking notes. Consultants may jump in to ask a clarifying question or to make sure they've captured an issue correctly.

<sup>2</sup> In order to run a customer co-design session using Customer Scenario® Mapping, you need to be trained, licensed, and certified. There are two levels of certification: 1) CSM Facilitators, who are licensed to lead internal sessions with employees as customers (or employees role-playing customers), 2) CSM Consultants, who are licensed to lead sessions with end customers and partners.

The sponsor, stakeholders, and subject matter experts should not participate in the discussion. They should listen actively and take notes. If they have questions,<sup>3</sup> encourage them to write the questions down and ask them later, one-on-one.

### Why This Kind of Discussion?

There are several reasons why it makes sense to use an Issues and Vision Discussion to kick off your customer co-design session. The reasons include:

- **Customers and Partners Want to Tell You What They Care About.** Customers expect to be asked to talk about their current issues with the topic at hand, and with your company and its products and processes. Prospects expect to be asked to talk about what they care about and

<sup>3</sup> Why do we suggest that the stakeholders stay mum during the issues and vision discussion? It has been our experience that as soon as one or two people from your organization begin asking questions, the session immediately shifts to a "grill the customers" session, rather than a discussion in which the customers feel they are in control and that they are setting the agenda.

what they need. Customers, ex-customers and prospects would be disappointed if you didn’t give them the floor at the beginning of your co-design session. They’re ready and waiting to tell you what they think!

- **Customers and Partners Love to Hear from Their Peers.** Customers love to hear about what other customers are doing. When they hear other customers talking about the same issues they face, they no longer feel alone. When they hear others talking about issues they haven’t encountered, they find it useful to know about those issues and to hear what others have done. It also reminds them to contribute their own experiences to the discussion.

Partners (agents, brokers, resellers, retailers) love to hear what’s going on in customers’ lives. They also like to compare notes with their peers. It’s helpful to them to realize that other partners are having the same difficulties and/or to learn how to work around a common issue.

- **Customers and Partners Who Share Current Reality and Vision Bond Quickly.** When customers share their problems and issues and compare notes with their peers, they bond with one another. They feel a common pain. When they begin to brainstorm about what they’d ideally like instead, they bond even more. The same is true with partners.

This bonding is critical to the success of your CSM session. Your customers need to be able to work together as a team towards a common goal. Your partners do, too.

- **Customers and Partners Like to Help Invent the Future.** When customers and partners are asked what their ideal experience would be, they enjoy brainstorming with one another. It’s human nature to have fun co-creating future possibilities. It’s energizing to co-create and think out of the box. It’s draining to complain all the time. So they enjoy being asked to dream, as long as they feel that their issues have already been heard and noted. Closing the discussion on a high note—talking about their ideal experi-

ence—is a great segue to your Customer Scenario mapping session.

- **You’ll Gain Rich Context and Validated Requirements.** The advantage of leading (and videotaping) a group Issues and Vision discussion is that customers quickly form a consensus about what the most important issues are and why these issues are problematic for them. You’ll gain insights and perspectives that are impossible to gain from surveys or individual interviews. The people in your company who will benefit the most from listening to this rich discussion are the stakeholders you’ve invited to participate in the co-design session. The other people who will benefit are the executives and employees who will watch the videotaped discussion. But it’s the people in the room who will gain the most context and understanding. A video will never replace the first-hand experience.

Many clients have told us that the insights they gain from these Issues and Visions discussions alone<sup>4</sup> justify the entire cost and effort of running each half-day customer co-design session. Of course, our clients receive even more value from the insights, metrics, and actionable game plans they can extract from the Customer Scenarios<sup>®</sup> that customers and partners create in the rest of the customer co-design session.

### Where Does This Group Discussion Fit within a Customer Scenario<sup>®</sup> Mapping Session?

- This Issues and Vision discussion belongs at the beginning of your Customer Scenario Mapping session. (*See Table A*). It’s the foundation you’ll need to insure that the scenarios you select represent the actual needs of the participants. It’s also the best way to begin the team-building process. Customers who have shared their sto-

<sup>4</sup> It is also possible to use our Issues and Vision discussion technique by itself—if you want to gather customer requirements, but not co-design solutions. We often conduct these sessions for our clients.

ries with one another will have an easy time working together to co-create their ideal experi-

ence.

Typical Customer Scenario® Mapping Session	
8:00	Sponsor's Welcome, Context, and Expectation Setting
8:07-9:00	<b>Customers' and Partners' Issues and Vision Discussion</b>
Break	[CSM Consultants Refine/Select Scenarios and Juggle Team Assignments]
9:15-11:00	Teams Map Customer Scenarios®
11:00-11:45	Teams Report Out
11:45-12:00	Synthesis, Summary, Thank You's

*Table A: The Customers' and Partners' Issues and Vision Discussion takes place in the first hour of a half-day Customer Scenario® Mapping session. It's the foundation for the rest of the customer co-design session. The timing shown here is approximate but gives you a sense of the relative amounts of time to be spent on the different sections of the exercise.*

The Issues and Vision discussion fits in right after the kickoff and introductions, and before the actual mapping begins. It is not optional. It's an important part of any customer co-design session. If you need to shortcut this part of your session for any reason, don't cut it to less than 20 minutes. Any time you think you're saving by reducing the group discussion time, you'll only have to make up later. Without this level-setting and consensus building, the customers and partners on each team will struggle to see eye-to-eye on important issues.

It's also important to spend at least one-third of the discussion period talking about what customers would ideally like to experience. If you spend the entire time talking about problems and issues, you'll find it difficult to get your team mapping an ideal scenario. You'll lose the opportunity to get them thinking out of the box!

### **IDEAL FLOW FOR A CUSTOMER/PARTNER ISSUES AND VISION DISCUSSION AT A CUSTOMER SCENARIO® MAPPING EVENT**

#### **Sponsor Kicks Off the Meeting and Sets Expectations**

The business sponsor of your Customer Scenario® Mapping session (or the highest ranking executive he or she can involve) should kick off the customer co-design session. He or she will set the stage by introducing him or herself and the other members of the company who are participating. She'll explain the initiative for which this customer (and partner) input is so vital. She'll describe how important it is to her organization to get customers and partners involved in co-designing solutions. She'll set expectations by explaining that she wants the customers and partners to push the envelope and to "blue-sky," and that not everything that gets co-created in this session will be implemented. Some ideas may not work for the business, and some ideas may take longer than others to implement. But all ideas are welcome. The more creative input she can get from customers and partners, the more likely it is that her organization will be able to deliver a better

customer experience, including new and improved products, services and business processes to better meet their needs now and in the future.

The sponsor should explain that this session is being videotaped for internal use only. Customer and partner input is priceless! We want to be sure that executives who weren't able to participate in this meeting have the benefit of hearing and seeing your input and ideas first hand.

### **Customer Scenario® Mapping Consultant Sets Context and Leads Introductions**

At this point, your customers and partners need to know more about how the session is going to go. They're eager to tell you what they came to tell you. They're nervous about this customer co-design idea. They're not sure what to expect. The consultant leading the session needs to accomplish two things very quickly:

1. Put customers at ease, by letting them know what's next and that it's easy and fun.
2. Get them talking about themselves and their issues as soon as possible.

**DESCRIBE THE AGENDA.** The CSM Consultant introduces him or herself and the other consultants/facilitators. He briefly describes the agenda, stressing that this next discussion is really important. It's the time in which the customers and partners should let their hair down and talk about their issues, their problems, how they do their jobs (or, if they're consumers, how they get things done), and how they'd ideally like to do them. He tells them that they'll have a break after the discussion, and then come back, join into teams, and be given instructions about how to map out their ideal experience. It's going to be fun!

**ASK CUSTOMERS AND PARTNERS TO INTRODUCE THEMSELVES.** We're now 15 minutes into the meeting and the customers haven't yet been introduced publicly. This may seem awkward, but it's actually OK with the customers (especially if you've greeted them warmly individually as they were settling in). You may certainly choose to have the customers and partners introduce themselves during the sponsor's welcome remarks. The reason

that we recommend you defer this step is so that you can segue smoothly from the introductions and customer context into their issues' discussion.

**COMBINE CUSTOMER AND PARTNER INTRODUCTIONS WITH ELICITING THEIR TOP ISSUES.** Go around the table and ask each customer the same opening questions; then follow the same format with the partners. Here are some examples of ways to combine introductions with your first discussion topic:

- **Consumer Customer:** Tell us your name, where you live, and what you do. Then tell us what's the biggest issue or problem you have with (your discussion topic—e.g., saving for retirement, buying groceries, buying a new house, doing business with us, using a Web site, using our products, etc.)
- **Business Customer:** Tell us your name, your role in your organization, what your organization does, and what's the biggest issue or problem you have with (discussion topic: doing business with us, getting something accomplished, etc.)
- **Business Partner:** Tell us your name, your role in your organization, what your organization does, and what's the biggest issue or problem you and your clients have with (discussion topic: doing business with us, getting something accomplished, etc.)

### **Lead a Discussion of Customers' Issues**

Now you've broken the ice, and you're off and running. You have a bunch of issues out on the table and customers are anxious to give you more. You can go back to each person and ask them to elaborate on the issue they raised, and/or ask them for additional issues and the context around those issues. Each time someone volunteers an issue, ask “does anyone else have a similar issue or problem?” People will either say yes, and add their own examples, with their own context, or they'll say, “no, but here's another one.” Many people will tell stories about situations they've had that they'd like to avoid in the future. Stories are great! One customer's story will trigger another customer's story.

It's important to encourage each speaker to provide enough context around why this presents a problem for them, so that everyone gets a clear picture. It's also important not to let one person monopolize the conversation by telling a long, involved story. The consultant will use his or her skills to pull out and reinforce the salient context, while moving onto the next person quickly. One reason this works is that everyone participating realizes that each participant should get equal time to talk about their situation, what's important to them and why.

One reason that this free-wheeling customer-centric dialog works so well is that it's about your customers first—it's really not a discussion about your company or its products or services. First and foremost, it's about what your customers (or prospects) care about in the context of their lives and their jobs. Second, you'll explore how your company's services, products, or support currently help or hinder their efforts.

This customers' issues discussion centers around the topics and issues that the customers themselves care about. They're talking about themselves; what they care about; what's important to them.

Obviously, it's true that you've convened this group of customers for a reason. You DO want to solicit their input about an initiative you're working on, or about their needs and requirements, or about how to improve their experiences of dealing with your firm, or to get their ideas for new products and services you could offer. But you will have already interviewed each of these people by phone before they join this session,<sup>5</sup> so you'll have a good idea about what makes each one tick and what's important to them. You'll use that background information

<sup>5</sup> See "Interviewing Customers for Your Customer Scenario Mapping Session: The Pre-Session Interview Enables Great Customer Scenario Choices," Susan E. Aldrich, June 16, 2005, <http://dx.doi.org/10.1571/me6-16-05cc>.

to steer the discussion in the direction that you know each customer cares about.

### Lead a Discussion of Partners' Issues

If you are running a combined session with customers and partners co-designing customers' ideal scenarios, you'll want to gather partners' issues as well. So, once you've heard from the customers about their issues (and before you move on to vision), it's time to switch over to gather issues from your partners. Make sure to spend more time on customers' issues than you do on partners' issues.<sup>6</sup>

Remember that you've already captured the partners' first set of issues during their introductions. It's easy to go back to those issues, to ask for them to elaborate, and to add other issues. However, we recommend that you kick off the partners' issues discussion this way:

- "You've already given us a few of your top-of-mind issues. Let's hear a few more. What do your customers care about the most? And

what are the hardest things for you to do in meeting their needs?"

Notice that by framing your partners' issues question around customers' needs, you're asking partners to focus on the things that matter the most to their customers, rather than the things that matter most to their business. They'll bring their business issues up as well, but in this joint customer/partner co-design

<sup>6</sup> It's not that partners' issues are less important. However, when you're combining customers and partners in a single design session, customers' issues should always lead. The whole idea is to drive priorities from the outside in—from the customer, to the partner, to your firm and its suppliers. If you do a lot of your business through distribution partners, we recommend that you run two half-day sessions back to back: 1) with customers and partners combined, 2) with partners only. But make sure that the same partners are involved in both sessions.

*This customers' issues discussion centers around the topics and issues that the customers themselves care about. They're talking about themselves; what they care about; what's important to them.*

session, you want to keep the focus on the issues that partners have in meeting or anticipating their customers’ needs.

### Switch the Discussion to Customers’ (and Partners’) Vision

Once you get customers and partners talking about the issues they have around the topic at hand, they could all keep talking for hours. You’ll need to be ruthless in shifting gears about one-third of the way through the discussion to move them from bemoaning the current state of affairs into visualizing an ideal state of affairs. This isn’t easy. We’re talking about moving from a discussion about today state to one about ideal state. Making that shift is like moving from having your feet stuck in cement to floating in the air!

**SWITCH TO PROBLEM-SOLVING FIRST.** One way to ease the transition from current reality to the ideal experience is to allow the group to do what comes naturally. Let them move into problem-solving mode first. There are lots of issues on the table. They’re going to naturally want to address those issues by suggesting work-arounds, fixes, or new policies. Some of these will be useful and practical suggestions. Others will be too specific and not grounded in enough context to make them really usable.

Don’t let the discussion devolve into designing solutions for all of the issues. Tell them that’s what they’re going to do next in the co-design activity, give them an opportunity to voice their suggestions, but not to flesh them out or to debate their merits right now.

Ideally, you want to limit the problem-solving discussion to no more than five minutes max and move to envisioning the ideal. If you can skip from current reality to envisioning the ideal without going through the problem-solving phase, you’re really good! Most of us find that customers want to start fixing things.

**MOVE QUICKLY TO ENVISIONING THE IDEAL.** The best way to end your discussion is with a shared vision that everyone can feel and be excited about.

You’ll need at least 10 minutes (preferably fifteen) to build this collective vision. Here are the questions that always work to frame the discussion around the ideal:

- If anything were possible, what kind of experience would you like to have?
  - How would that feel?
  - What would you be able to do that you can’t do today?
  - How long would it take?
  - What would be different?
- Again, if anything were possible, what would you be able to do quickly and easily?
  - What would be the benefits to you?

*People will naturally gravitate toward taking action in the direction of their shared vision.*

### Why Is It Important to End the Issues and Vision Discussion with the Vision?

You want your customers, partners, and the participants who listened to their dialog to be creating a shared mental model of current reality and vision. This provides the “structural tension” that will produce the best results for your Customer Scenario<sup>®</sup> Mapping session. I learned about structural tension from Robert Fritz, one of my mentors, and the author of many courses and books on the creative process.<sup>7</sup> Here’s how it works (it’s very simple): You develop a clear picture of your current reality—the way things are today. And you develop a powerful vision—the way you’d ideally like them to be. You hold onto and nourish these two concepts simultane-

<sup>7</sup> See *The Path of Least Resistance for Managers: Designing Organizations to Succeed* by Robert Fritz. (1999). Berrett-Koehler Publishers, Incorporated, or *Corporate Tides, the Inescapable Laws of Organizational Structure* by Robert Fritz. (1996). Berrett-Koehler Publishers, Incorporated.

ously. The creative process automatically kicks in, and the tension will always resolve in the direction of your vision.

Therefore, our group interview approach helps a group of people—in this case, customers and partners—create a shared mental model, both of current reality and of a shared vision. They go into their break with the structural tension between the clear and complete picture of their current reality—how bad things really are—and their shared vision—what they’d all like to have happen, if anything were possible. Then nature takes its course, and people will naturally gravitate toward taking action in the direction of their shared vision. This is why a seemingly simple idea—let’s get everyone together and compare notes—takes on power and momentum and builds a strong foundation for lasting change. The foundation that you’ve built in your 45 minutes to an hour of customer Issues and Vision discussion is critical to the success of the next two hours of cus-

tomers co-design activities. It has also become the foundation for profound and lasting change for everyone who participated in the dialog (and/or who later witnesses it on video).

### PITFALLS AND HOW TO RECOVER

What pitfalls are you likely to encounter and how do you recover from them? In all of our years of running these kinds of sessions, we’ve had some real doozies. Here are some of the pitfalls we’ve run into and our suggestions about how to deal with them.

#### Customers Harp on a Single Issue

Sometimes customers have so much pain around a particular issue that they don’t want to let it go. This is particularly frustrating when it’s an issue that you already know about and are in the process of fixing.

### Example Flow for a Customers’ (and Optional Partners’) Issues and Vision Discussion

Logistics	Explanation/Description
<p>30 to 60 minutes, depending on the number of customers and/or partners involved</p> <p>Large conference table set in a U- or O-shape, so that everyone is facing each other</p> <p>One CSM Consultant leads the discussion; other consultant(s) capture issues and comments on flipcharts.</p> <p>Videotape this discussion; it’s priceless!</p>	<ul style="list-style-type: none"> <li>• If you have four to six customers, you’ll need 30 minutes; if seven to 16 customers/partners, you’ll need 45 minutes; if you have more than 16, you’ll need an hour.</li> <li>• You’ll need to move quickly around the table in order to ensure that everyone gets his or her say; get the gist of each person’s contribution, then move on to the next. Don’t let anyone monopolize the conversation. Do call on people as they appear animated or ready to share.</li> <li>• You want everyone to be able to see and hear one another. If you have up to 15 people, you can probably get by without microphones. If the group is larger than that, try to have microphones available for people to use without having to pass them around.</li> <li>• Make sure that customers and partners have name tags on so that you can clearly tell who is who. You want to gather customers’ issues and vision separately from the partners.</li> <li>• Participants who are not customers and partners should ideally sit behind the table, not at the table, so that it is clear that the customers and partners are the ones engaged in the discussion.</li> <li>• Use flipcharts to capture major issues and discussion points.</li> </ul>

Example Flow for a Customers’ (and Optional Partners’) Issues and Vision Discussion <i>(continued)</i>	
Discussion Flow	Sample Comments/Questions
<p>Introduce yourselves, your roles, and your issues.</p> <p>Get the discussion rolling.</p>	<p>Introduce the consultants first, then the customers, and then the partners. Set an easy, informal tone—kind of like a dinner party conversation. Encourage humor and interaction, but go around the table—customers first, then partners—so that everyone contributes in the first round of introductions. Good ice breakers are:</p> <ol style="list-style-type: none"> <li>1. Consumer Customer: Tell us your name, where you live, and what you do. Then tell us what’s the biggest issue or problem you have with (discussion topic: doing business with us, getting something accomplished, etc.).</li> <li>2. Business Customer: Tell us your name, your role in your organization, what your organization does, and what’s the biggest issue or problem you have with (discussion topic: doing business with us, getting something accomplished, etc.)</li> <li>3. Business Partner: Tell us your name, your role in your organization, what your organization does, and what’s the biggest issue or problem you and your customers have with (discussion topic: doing business with us, getting something accomplished, etc.)</li> </ol>
<p>Spend the first third of the time building a complete, shared mental model of customers’ current reality.</p> <p>Capture customers’ issues on flipcharts</p>	<p>Ask for volunteers, and let customers contribute to the discussion and build on each other’s contributions. Get them sharing stories and anecdotes. Call on those who haven’t volunteered until everyone has contributed and you have a complete picture of customers’ issues and context.</p>
<p>If you have only customers, spend the next third drilling into issues that need more clarification and moving into problem-solving discussion.</p>	<p>Customers will offer both problems and solutions. Capture both. Encourage brainstorming. Discourage finger-pointing. Give feedback on what you hear in objective but sympathetic or humorous tones. Encourage people to build on what others have said. Draw out the silent lurkers.</p>
<p>If you have partners in the session with customers, move on to discuss the partners’ issues.</p>	<p>Ask the partners: “What do your customers care about the most? What are the hardest things for you to do in meeting their needs?” That will keep the discussion focused around customers’ issues, while giving the partners ample opportunities to raise concerns that make it hard for them to do their jobs.</p>

Example Flow for a Customers' (and Optional Partners') Issues and Vision Discussion <i>(continued)</i>	
Discussion Flow	Sample Comments/Questions
Spend the last third of the session building a shared mental model of a collective vision ("if anything were possible").	<p>Now go back to your customers and ask:</p> <ul style="list-style-type: none"> <li>• If anything were possible, what kind of experience would you like to have?</li> <li>• How would that feel?</li> <li>• What would you be able to do that you can't do today?</li> <li>• How long would it take?</li> <li>• What would be different?</li> <li>• Again, if anything were possible, what would you be able to do quickly and easily?</li> <li>• What would be the benefits to you?</li> </ul> <p>If you have partners, ask them an abbreviated set of the same questions</p>
Close the session on time on a high note	Customers and partners may continue to raise issues and to problem-solve. Capture all of these issues and suggestions, but take them back to the ideal experience. Close the discussion on a high note—as soon as one customer has articulated a great description of his or her ideal state and others' heads are nodding. It's OK for people to feel that you've cut the discussion short—you'll want the pent-up creative energy to take you into the next session.

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*Table B. Here are some tips for leading an Issues and Vision discussion with customers and partners to kick off your Customer Scenario<sup>®</sup> Mapping session. Don't make this a formal agenda. Use this format yourself to lead the session. Keep it organic and natural. Have fun!*

**EXPLAIN WHAT IS BEING DONE TO ADDRESS THE ISSUE AND MOVE ON.** The best way to deal with an issue that is so "top of mind" for customers that they can't move on to another topic, even though you've captured it and assured them it's being addressed, is to ask the most senior executive in the room to take five minutes and explain what's being done. He or she should also offer to discuss it at the end of the meeting. Then, ask an "interrupt" question, something that will get people thinking freshly about a different part of their experience. For example, if they are stuck on an issue that involves service and support, ask them if they have any issues about selecting which product to buy.

### **One or Two Customers Dominate the Discussion**

This is not uncommon. But any skillful facilitator should be able to handle this by moving on to the next person.

**HAND THE MICROPHONE/FLOOR TO ANOTHER STRONG PARTICIPANT.** If you have one or two people who monopolize the conversation, be ruthless about giving equal time to others. Encourage others to tell stories. Ask them to elaborate, draw them out. In the face of a dominant personality, interrupt that person in mid-sentence and open up the dialog to someone else. "Thanks, Joe, we got it, has anyone else had a similar issue? And if so, how did it make you feel?"

### Stakeholders Hijack the Discussion

This pitfall sneaks up on you. One of the stakeholders (not a customer or partner) asks a clarifying question. They’ll often preface it by saying “is it OK for me to ask?” Sometimes they won’t ask permission. If the former, be careful, your instinct will be to say “of course.” But you’ve now just opened a dangerous floodgate. One clarifying question will lead to five more and before you know it, your Issues and Vision discussion has turned into a “grill the customers” discussion. Everyone will be enjoying themselves, but you won’t be able to easily reclaim control and lead the discussion back to customers’ issues and vision.

**MAINTAIN CONTROL; REPHRASE THE QUESTION.** If this happens, the facilitator should maintain control of the conversation by restating the question that is being asked and then moving on. Use this opportunity as feedback that you need to ask more follow-up questions to ensure that all of the context surrounding each issue or suggestion is captured. But don’t let one or more stakeholders take over the Q&A. If that does happen, take control back as soon as you can, and emphasize that there will be ample time for the stakeholders to pick customers’ brains as they work together on their co-design teams.

### Customers Have Difficulty Articulating Their Ideal Experience (or You Run Out of Time)

It happens very rarely that your customers are so rooted in current reality that they can’t even imagine a better experience. They can only imagine decreasing the pain. It’s also difficult to move customers from current reality through problem-solving to a real vision discussion. People like to complain and to problem-solve.

**OFFER STRAWMEN IDEAL EXPERIENCES TO PRIME THE PUMP.** The best way to model an ideal experience for customers is to describe it yourself. Put yourself in their shoes and describe the absolute ideal experience. Include in that description how it would feel, how much time it would take, how easy it would be. You may want to describe this ideal experience as five years out. It makes it easier for customers to suspend disbelief. Hopefully, your vision

will prime the pump and get them contributing their own versions. Worst case, yours will be the ideal vision they hold as you close the discussion and thank them.

### WHAT INFORMATION SHOULD YOU CAPTURE AND DOCUMENT?

Make sure that your co-facilitators capture all the issues (and vision) that customers offer in words that are close to the customers’ own words as possible. Put customers’ phrases in quotes. Ideally, use two flipcharts to capture issues. One facilitator captures one person’s contributions, while the second facilitator captures the next person’s thoughts. The CSM consultant leading the discussion should not try to capture issues on a flipchart. It will slow the conversation down.

Make sure that all of your stakeholders are taking notes. They’ll be able to capture more than your facilitators will be able to get up on a flipchart. Ask everyone to compile their notes and submit them to the facilitation team within 24 hours, so they can be compiled, annotated, and turned into action items.

Videotape the customers’ Issues and Vision discussion. Ask their permission first. But don’t make a big deal out of it. As long as customers know that you want to use this to get their ideas disseminated internally and to their top executives, they’ll be comfortable. Try to zoom in on people’s faces as they talk. Don’t worry about capturing the facilitator. It’s the customers and partners whose comments, stories, and expressions are priceless! Make sure that you have really good quality audio. Use a portable microphone, if necessary. The facilitator can hand it around, thereby controlling the discussion as well as the audio quality.

### BENEFITS OF THIS APPROACH

#### Gives You a Huge Head Start for Customer Scenario® Mapping

If you use this group discussion technique to jumpstart your Customer Scenario® Mapping sessions, you’ll gain much higher quality results from the mapping teams.

1. Your customers and partners will feel very well heard and happy about the dialog. They'll be impressed by how well and carefully you listened to their issues. They'll enjoy hearing from others and gaining new insights. They'll feel it was time well spent. They'll feel a much stronger bond with your firm.
2. You'll gain a validated set of prioritized customer requirements even before you begin your customer co-design activities. Customers will build consensus around the issues they care most about and the experience they'd value the most.
3. You'll have captured a context-rich set of customer requirements, issues and vision in formats that are easy to share with employees and executives. You can edit the video clips, turn the flipcharts into action plans, and present your findings to a broad group of stakeholders. These findings are very convincing!
4. You'll be able to ensure that the scenarios you've preselected actually address customers' key issues, and/or to tweak your scenarios so that they closely match customers' issues.
5. You'll be able to make sure that the people you've preselected to make up each team of customers, partners, and stakeholders are a good fit with one another. If you notice that two customers in similar roles and companies, or similar consumer demographics actually have very different issues and reactions, you'll want to place them on different teams.
6. Customers will bond with one another over common issues and vision. That will make it very easy for each customer team to create a composite hypothetical customer, a scenario that is very realistic, and one that includes most of the context they share in common.
7. Your customers and partners will be eager and ready for the next step—actually co-designing their ideal experience with your team. That's why closing with the vision discussion is so important. It primes the pump to get customers thinking out of the box.

### **Provides Really Useful Customer Input for Strategic Decisions**

Even if you run this kind of Issues and Vision discussion without the actual Customer Scenario<sup>®</sup> Mapping exercise, you'll gain the first three benefits listed above.

Many of our clients have found that the outputs from these sessions are well-suited to present at executive steering committee meetings and even board meetings.

This “voice of the customer” input is extremely valuable because it is gathered from the customers' point of view, in the context of how customers' think about their own lives and jobs, and with validation from other customers who share the same issues and vision.