HOW TO DO A UBR

Drive customer transparency, insights & revenue
with conversations about THEM, not you

BY: BOB LONDON

**Includes 2 bonus sections!*
FAQs & Overcoming Hesitation

Contents

Welcome to The UBR

I really appreciate your interest in The UBR, which tells me a little something about you, actually.

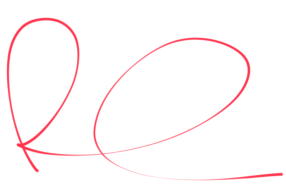
You want to have more engaging, strategic customer conversations that help you drive outcomes. And you're willing (craving!) to challenge the longstanding (stale?) convention of QBRs as the default customer touchpoint.

My mission is to help hundreds of thousands of customer-facing professionals - including you! - drive more transparency, insights and revenue in your customer interactions. That's why I'm giving away - absolutely free and with no obligation - everything you and your team need to start using The UBR

This e-book is meant to provide a do-it-yourself resource, with the proven tools, tips and techniques you need to start having more engaging and revealing customer convos.

I hope this e-book blows away your expectations and helps you more deeply understand your customers' priorities and challenges. As always, I welcome your comments, feedback and questions at bob@chieflisteningofficers.com or via LinkedIn DM here.

Stay curious!



Bob London

I. The Antidote to “QBR Fatigue”

Fact: Forrester Research found that 82% of executives would rather have a conversation than get a presentation.

And according to The Rain Group, more than ⅔ of B2B buyers said discovery and listening were two of the top three purchase influences - yet only 26% said vendors were effective at these skills.

Having done customer discovery conversations with over 2,600 B2B decision makers, I concur! I’ve seen first-hand the insights customers reveal when you stop PPT-ing them and start asking ABOUT THEM. I’ve learned how to uncover customer priorities and challenges by asking “disruptive,” open-ended questions and then letting the customer take it from there.

All of which helps you define value on THEIR terms. And that’s exactly why I created The UBR.

What is The UBR?

It’s a strategic customer conversation where your only goal is to understand the customer’s broader priorities and challenges. Think of it as “discovery on steroids” (or customer re-discovery). No agenda and no slides (what a relief!). The UBR is simply you asking a few disruptive questions to get customers to reveal what’s important to them.

When should you use The UBR?

I recommend doing at least 1 UBR per year per customer. You can replace 1 QBR per year with a UBR. Or you can carve out time during a QBR, EBR or other cadence meetings to ask UBR questions.

Why should you use The UBR?

The disruptive questions you ask customers will increase their transparency. They’ll reveal more about their company’s top-level priorities and challenges, which will help you position your product accordingly.

You’ll get a more accurate read on their status - including whether they’re susceptible to competitive overtures.

You’ll also identify expansion opportunities based on unserved or unmet customer needs. And perhaps most importantly, you’ll elevate your team’s status and influence, because you’ll gain insights you can leverage to authoritatively collaborate with product, sales, marketing and other teams to drive innovation and growth.

II. Positioning the UBR With Your Customer

In order to have an effective UBR conversation with customers, you need to frame your request to set their expectations accordingly. You want to ask if they'll "take a step back" with you, allowing you to learn more about what the world looks like from their perspective.

Here's a sample template you can start using today:

> *Subject: This week's call.*
>
> *Hi, Christina.*
>
> *Just a quick note about this week's call. I'd like to reserve some time at the end for a bit of a "step back" conversation, time permitting. This just involves us asking a few open-ended questions so that we can listen and learn about (COMPANY)'s top-level priorities and challenges. The more and better we understand, the better we can deliver the value you need from us.*
>
> *Let me know if you have any questions.*
>
> *Best,*
>
> *- You*

Here's another method - a "talk track" you can use at the beginning of a customer meeting:

> *"As we get started, I wanted to see if we can grab some time at the end of the call – time permitting – for a bit of a "step back" conversation. It just involves us asking a few open-ended questions so that we can listen and learn about (COMPANY)'s top-level priorities and challenges. I promise it's painless! And it'll give us a better understanding of how we can add value. Sound ok?"*

After hearing this context, customers will understand that you want to have a bigger-picture conversation about their priorities and challenges vs. the usual routine of discussing feature updates and usage statistics.

III. The UBR Questions

Here are three disruptive questions I use to uncover customer insights as part of the UBR.

A. *“If I could be a fly on the wall at your next board meeting or executive leadership meeting, what do you think would be the number one priority or challenge they’re talking about?”*

I’ve asked this question at the beginning of nearly every discovery conversation I’ve conducted over the years. Here’s why it’s my leadoff question, and why it works so well:

- Their answer to this question gives you tremendous insight as to where the budget is flowing. Where are the resources and energy flowing? Not because it’s flowing directly to your product, but it helps you position your product to align with their top priority.
- This question also disarms the customer. They’ll think (or even say out loud), “Wow, that’s a good question,” which is a signal that you're disrupting their “same old” vendor-customer thought patterns. This question shows them right off the bat that you’re viewing them as more than just a “user.” You’re curious about their overarching needs in a more holistic way.
- And remember, asking disruptive questions like this one is a huge differentiator for you. It’s a clear signal to the customer that you’re just not just another vendor trying to go down a checklist. You’re curious about their bigger picture.

And as the Great American poet Maya Angelou once said, *“People may not remember everything you said but they will remember how you made them feel.”*

So make your customers feel like you're curious about them.

B. *“Most job descriptions are a page or two long, single-spaced, but usually there’s one thing in there that the company is absolutely counting on you and your team to get done this year. Is there one thing like that for you?”*

Great companies don’t just look at their customers as users of the software. They understand customers’ jobs more holistically. This disruptive question helps you get a bigger-picture understanding of your customers’ jobs vs. just seeing them as a user of your software or solution. Remember, using your product might only be 10 or 20% of their world. What outcomes are they responsible for delivering?

Here’s why this question works so well:

- Usually, people have various responsibilities and tasks, but there’s often one main thing that they are going to be judged on at the end of the day - more so than anything else in their job description.
- This question will get the customer to share their one big thing. In fact, you might hear them thinking out loud while they’re formulating the answer, and it’s fascinating to hear that thought process.
- Now, their one big thing may not be something your product solves directly. But it may be adjacent to your product. So you may uncover new feature ideas for your product team or content themes for the marketing team.
- But at a minimum, their answer helps you empathize with what’s on their plate. And empathy is another key to transparency.

C. *“What’s the biggest thing that surprised you since you signed the contract with us?”*

This question helps you uncover the “delta” or difference between the customer’s expectations at the beginning of their relationship with your company/solution and their perceptions today. Here’s what customers’ answers can reveal:

Positive surprises

It’s notable that I’ve asked this question hundreds of times, and about half the time it’s a positive surprise.

Positive surprises are great news, not just because they could lead to a new case study. Let’s say a number of customers cite a particular surprise, like “We were pretty impressed at how quickly we were up and running.” You can share this nugget with your marketing team and collaborate on ways to leverage this benefit in your company’s messaging, including as a key differentiator vs. competitors.

Negative surprises

If customers mention a negative surprise, this is still a good thing. First, always thank them for being candid. They’ve just given you their truth - and you can’t address a problem or concern that you don’t even know about. For customer success teams, this helps you mitigate churn.

IV. How to Listen

Now that you know some of the questions that get customers to open up, here are three deep listening techniques to get them to reveal even more about their priorities and challenges.

A. Start with a quiet mind.

We all have 57 browser tabs open across multiple monitors, not to mention our "smart" phones singing a chorus of notifications from numerous "productivity" apps. We rush from one conversation and topic to the next - with a bio break or snack in between, if we're lucky.

That's why it's incredibly important to quiet your mind before each customer call to help you get the most insights - and to leave them feeling understood. Good news: It doesn't require a transcendental meditation or yoga session. You can do it yourself in just 30 seconds.

Here's how:

- Half a minute before the call starts, hide as many distractions as possible - any browser windows and monitors you don't need, phone on DND.
- Take a couple deep breaths. Focus on the person/people you're about to speak with and strip away the substance of the upcoming call for a moment. Think of them as simply human beings who want to do a good job, feel satisfied at the end of the day and perhaps achieve some recognition and growth opportunities for their work.
- Commit to being authentically curious ABOUT THEM, not just as a user or decision-maker in regards to your product. Open the aperture to try and understand their broader job. And what their company is trying to accomplish at the highest levels.

B. Don’t solve or sell.

You might be thinking, “Huh? That’s heresy. Our job is to make customers more successful by solving challenges or providing solutions.” That’s an understandable reaction. You’re in a customer-facing role, so your instinct and training is to jump in and help.

But think about it this way. Interjecting or shifting the conversation back to our agenda can feel like an interruption to the customer’s “flow” or thought process. That gets in the way of them feeling heard.

Remember: The UBR has a different purpose. It's all about UNDERSTANDING THEM. So we need them to feel like they're in a safe space where they can bring up anything without us pivoting back to our perspective.

Of course, there's a time and place for solving and selling. At the appropriate juncture in the conversation, preferably at the end, you can say something like:

> *"I appreciate you being so candid today. I'd like to go back to what you were saying about (topic/challenge). Can I ask a question or two to make sure I fully understand the challenge you're having and the impact it has on what you're trying to accomplish?"*

C. Embrace Silence

This is a challenge for so many people. When there's a pause in the conversation - even just a few seconds - we tend to get a bit anxious and start to chime in. That means making filler comments, which don't advance the conversation, or moving to another topic. The problem is that the customer might have more to add about the current topic.

Try to pause and breathe when there's a slight gap. My favorite trick is going on mute while the customer is talking, which prevents me from jumping in with unnecessary comments that could derail or distract their train of thought.

V. The UBR Mindset

Now that you have questions and listening techniques that get customers to open up, here are three mindsets you should embrace to maximize the insights you uncover during The UBR.

Be the student, not the teacher

Remember, customers are experts in their job and company, not your product. That's why they engage so much when you start by asking about their company's priorities and challenges instead of your product. When they share, your role is no longer to be the expert or "teacher." You become the student, eager to understand their world.

Support don't shift

This is a powerful concept that Kate Murphy talks about in her book, "You're Not Listening." Support where the other person is going to fully "get" their intent and meaning. Don't shift to what you think is important, which can inhibit the customer from sharing openly.

Be authentically curious

One of the most powerful tools in your UBR arsenal are second-level, clarifying questions like:

- *"What did you mean by ____?"*
- *"Why is that such a high priority?"*
- *"Who else in your company is most impacted by that issue?"*

Asking these follow-up questions help make The UBR into more of a conversation than just a series of survey questions. They show you're listening and interested in diving deeper into what they're talking about - what's important TO THEM.

VI. Bonus Resources

A. Typical Reactions & FAQs

In my experience, customer-facing professionals and leaders have a range of questions and reactions to The UBR approach. As with any bold, disruptive approach, you may feel confident asking new questions or you may experience hesitation or discomfort.

That's understandable! To help you get past any "speed bumps" or hesitation, I've addressed some of the most common questions and reactions here:

i. I don't have a strong enough relationship with the customer.

While this may be a valid concern in some cases, In my experience, it's often a sign that you're not comfortable going "outside the guardrails" of the typical customer conversation. The purpose of The UBR is actually to BUILD the relationship. Customers respect authentic curiosity, and the disruptive questions will encourage them to open up.

ii. Which questions should I ask and when?

That's your call. Different questions are appropriate for different customer types and points in the journey.

iii. I'm not comfortable asking these questions. Some of them are intimidating.

That's understandable, but after conducting 2,600 customer discovery conversations and teaching many customer-facing professionals this approach, I can assure you it's worth trying. Also see answer A above regarding "guardrails."

iv. Customers don't want to discuss strategy. I don't think the customer will open up.

In reality, customers aren't discussing strategy per se! They're actually revealing their problems, priorities and perceptions, at the company (impact), business (value) and operational (outcome) levels. They are very comfortable opening up about these topics; in fact, you don't have to react much…just prompt them to continue and go deeper. The result is that they'll talk 85% or more of the time. Remember, your job is to listen and learn.

Once in a while you might get a customer who "keeps their distance" on the call and gives shorter answers. However, in my experience (nearly 2,600 customer convos), people will open up. Often, they provide such in-depth answers that the meetings go longer than scheduled!

v. **The customer is at risk, so I don't want to rock the boat.**

Understandable - it's your call. One of the reasons you're in a customer-facing role is because you have good judgment and can "read the room." If you don't feel the timing is right, don't ask the questions.

vi. **I don't want to ask questions I don't know the answer to.**

In business, we tend to focus on questions to get the answers we want, rather than the answers we need to hear. The UBR is a chance for you to do the latter. And that means you don't have to be the "expert" all the time.

vii. **I'm not sure who to speak with. I don't have access to the decision-maker.**

Ideally, you'll speak with the person who has an understanding of the broader business objectives as well as familiarity with the value of your solution. In other words, it is better to talk to a decision-maker/buyer vs. a user. If you don't have access to the buyer, you can start with your day-to-day contact and then work your way up in subsequent conversations.

The template and talk track I shared previously will help the customer understand that you are looking to learn about their company/business priorities and problems. So, it appeals to the higher level stakeholders who may not normally engage with you.

viii. **How do I know this approach is working?**

You may get initial responses, like, "Hmmmm…"; "That's a good/interesting question."' and "No one's ever asked me that before." These are signals that you're disrupting the customers' usual thought patterns and engaging them in a way that gets them to lean in and give more thoughtful answers.

B. Tips for Getting Started / Overcoming Hesitation

Remember:

- Customers want to open up when you ask ABOUT THEM.
- There's no pressure on you to know everything.
- They appreciate and respect your authentic curiosity.

Practice using a few of the questions and listening techniques:

- With a team member. Then switch roles. Give each other constructive feedback.
- With someone from sales, product or marketing.

Look at your calendar and pick 3 customer calls in the next 2 weeks:

- Ask at least 2 disruptive questions.
- Make note of:
    - How it felt to ask the questions and just listen.
    - What the customer said.
    - What you learned from their answers.
    - Any actionable insights.
    - What you might do differently next time.

Record the calls if possible:

- Self-assess.
- Share with others for feedback.
- Share with your manager for coaching.

C. Helpful Stories from People Just Like You

To give you a bit more confidence and momentum, here are some of my favorite quotes from B2B CS VPs, Directors, and ICs:

“Personal advice, if you take just 1 of Bob's questions and ask it to just 1 customer, you'll be sold on this approach. The first time is hard, but the following conversation is 100% worth it.”

“(One of our CSMs) uncovered a massive issue with a client asking the question "if a competitor called, how would you react". We have a chance to save the client.”

“Bob, when I asked my prospect one of your questions, the ensuing conversation revealed an issue I was then able to address. As a result they were comfortable enough signing a three-year contract instead of the one-year contract we were originally discussing.”

“Just asked a Bob London question in a monthly client call...it worked wonders! Asked the magic wand one...from their answers, I was able to get 2 great customer Outcomes and success goals.”

“On my monthly touchpoint today with the customer, I used one of Bob's discovery questions. I was surprised how much insight I was able to glean from him with such an open-ended question.”

“I just had a call with REDACTED and I can also attest to how valuable those questions are. I saw my client crack a smile when I asked them what problem they would fix first with a magic wand.”

“I wanted to thank you for taking the time to speak with my team this week. The insights you provided have already made a major impact on them and me. I've already asked two clients, and a handful of recruiters "what is one thing that has shocked you in the last 60 days?". It's amazing how powerful tweaking simple questions can change how people respond!”

“A lil weekly win to share with thanks to the Bob London training! I asked a client today during a contractual conversation one of the “about their business” type questions: "what do you think is the biggest priority or challenge your board is facing?" This led to a really great goals conversation which helped me uncover a new customer outcome of Reducing fixed expenses to help keep costs low.”

*“Wanted to connect and let you know that implementing these RAD questions into my conversations with my clients and my team has *radically* changed the quality of the feedback I've been receiving.”*

“Wanted to share. I asked my client ‘So you're doing your Q2 planning and that's great timing because I wanted to talk to you about your renewal, which is 90 days out. I'm wondering, if my competitor called you and wanted to schedule a call, would you take the call? Whoah... Mind you, I have this client forecasted to churn. I got a huge surprise!! First, it was a great conversation! She kind of laughed at the boldness of the question... I made a little joke and said as though I was her…”as a matter of fact…” and she said NO. "No, I would not take the call, I am definitely planning to renew." She went on to say she is very happy with our solution and her investment. She admitted she has been slow to integrate the workflows and she might evaluate if she needs all of the parts of the suite, but she loves the Tool and the insights as well as the call outs I am making for her. So be bold and ask this question. It is powerful and you may be surprised at the answer.”

Craving More UBR Tools, Tips & Techniques?

This e-book gives you everything you need to get started with The UBR and drive transparency, insights and revenue. If you want to really up your game, you'll want to consider my exclusive UBR Training Program, which features:

- A live, 1-hour session, during which:
  - I'll share the entire methodology
  - Answer key questions
  - Walk your team through the creation of their UBR action plans
- 14-page UBR Playbook with:
  - All 16 disruptive questions
  - All 12 listening techniques
  - FAQ library
- Live, 1-hour follow up feedback session with your team (optional)

BOOK UBR TRAINING TODAY

Please Keep Me Posted on Your UBR Journey

I hope you found this “How to Do a UBR” e-book useful and that you’ll begin adopting the tools and techniques to drive customer transparency, insights and revenue. Thank you for your attention and support!

I love hearing from customer-facing professionals and leaders as your UBR journey continues. Feel free to reach me at bob@chieflisteningofficers.com or via LinkedIn DM here.

Stay curious!

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