

Example: Handling a Customer With Vague Goals

Scenario Overview:

The customer has completed onboarding, but during the introductory call with the CSM, they are unsure about their specific goals with the product. They express general objectives, such as “improving team efficiency” or “getting more out of the tool.”

Role-Playing Script

CSM:

"Hi [Customer Name], it's great to meet you! I'm [Your Name], and I'll be your Customer Success Manager. My role is to ensure you achieve the most value from [Tool Name] by aligning the product to your business needs. Congratulations on completing onboarding—I've heard your team has made great progress so far!"

Customer:

"Thanks! We're excited about the tool, but honestly, we're still figuring out exactly how we want to use it."

CSM:

"That's completely normal at this stage, and I'm here to help. Let's start by discussing some of your broader objectives—what's your team hoping to accomplish with [Tool Name]?"

Customer:

"Well, we want to improve our team's efficiency and maybe streamline some processes."

CSM:

"Got it. To dive a little deeper, can you give me an example of a process or task where you feel there's room for improvement?"

Customer:

"Sure. I think our reporting process takes too long. We're spending hours each week pulling data from different systems."

CSM:

"That makes sense. A lot of customers in similar situations use [Tool Name's reporting feature] to automate that process and save significant time. If we could reduce your reporting time by 50%, would that be a meaningful improvement for your team?"

Customer:

"Absolutely, that would be a huge win."

CSM:

"Great! Let's set a measurable goal to work towards. For example, reducing reporting time by 50% in the next quarter. Does that align with your expectations?"

Customer:

"Yes, that sounds good. What would the next steps look like?"

CSM:

"We'll start by exploring how your current process works and identifying ways [Tool Name] can optimize it. I'll also connect you with our Knowledge Hub for a quick guide on the reporting features. Would you like to schedule a follow-up call next week to discuss progress?"

Customer:

"That works for me. Thanks!"

CSM:

"Perfect. I'll send over a summary of today's discussion and an agenda for our next call. I'm excited to help your team achieve these goals!"

Framework for Customers With Vague Goals

- 1. Start With Open-Ended Questions:**
 - "What are your team's biggest challenges right now?"
 - "Are there any specific outcomes you're hoping to achieve?"
- 2. Use Examples to Guide the Conversation:**
 - Highlight common goals of similar customers (e.g., "Many of our customers aim to streamline reporting or improve campaign ROI.").
- 3. Define Measurable Goals:**
 - Propose achievable objectives based on their input.
 - Example: "Let's aim to reduce reporting time by 50% in the next quarter."
- 4. Provide Resources and Next Steps:**
 - Suggest relevant features, guides, or training sessions to help clarify their needs.
 - Schedule a follow-up call to refine goals as they explore the tool.

Key Takeaways:

- Use open-ended questions to uncover hidden needs.
- Translate vague goals into measurable objectives.
- Build trust by showing empathy and offering tailored guidance.

