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Expansion Questions – An Essential Discovery Skill

Expansion Questions are a series of interrelated questions designed to span five of the Discovery skills levels, from uncovering pain to reengineering vision. They are a simple, yet essential skill to master in doing Discovery – enabling vendors to extend, deepen, and quantify your prospect's main pain and related impacted areas.

Expansion Questions leverage your experiences with other prospects and customers, providing you with lists of likely problem areas, impacts, and outcomes to explore with new prospects.

An Example

We'll join a vendor and prospect near the beginning of a Discovery call – they are talking about the prospect's current workflow that handles customer requests and issues. Let's listen:

- Prospect comments, "It's a manual process…"

- Vendor responds, "Sorry to hear this – what takes place today?"

- Prospect explains, "Well, each request is entered, reviewed, processed, escalated, and closed in a series of steps, with each step done manually by an individual, then passed to the next in line."

- Vendor, asking an Expansion Question, "Does it typically go smoothly? For example, what happens when someone is on vacation?"

The vendor knows, based on previous experience with similar prospects, that vacations often have serious negative impact on these workflows.

- Prospect replies, "It's a mess! We literally have tickets piling up on people's desks…!"

- Vendor responds, "What happens then?"

- Prospect offers, "At minimum, it causes delays in response time which impacts customer satisfaction."

Our vendor makes a note to come back to this impact statement later, but focuses on the current issue for now:

- Vendor asks, “I see – how many folks are involved on your team?”

- Prospect says, “We have a total of 12 people doing this – and it is too many…”

- Vendor pursues, “Understood – and what would you like to reduce this to?”

- Prospect states, “I’d love to get this down to 1 or 2 people – there’s plenty on the team’s plate that needs to be done in addition to this process!”

Note that our vendor has quantified a desired outcome – a Delta – reducing the number of people in the workflow from 12 to 1-or-2. Next, knowing that manual processes typically result in errors, our vendor introduces another Expansion Question:

- Vendor offers, “I see – how often do errors creep into your process today?”

- Prospect declares, “Oh, all the time…!”

- Vendor expands, “And what happens when errors occur?”

- Prospect admits, “Well, we often have to go back, find the error, and then re-work the downstream portion of the workflow – it can get pretty bad!”

- Vendor quantifies, “Sorry to hear this – how often does this occur and how long does it take to correct, on average, for each occurrence?”

- Prospect notes, “At least once a week – and it can consume hours to fix each one.”

- Vendor offers, “And I’m guessing you’d like to reduce this to zero or near zero, if possible – correct?”

- Prospect responds, “Absolutely…!”

Note that our vendor has now quantified three aspects of the manual process, so far, capturing the prospect’s specific numbers. Our vendor then explores more impact through another Expansion Question, again based on experience with other prospects:

- Vendor queries, “And what happens downstream – who else is impacted?”

- Prospect notes, “Oh, it ripples throughout the organization, resulting in sending the wrong patches, incorrect documentation for customer success managers, mistakes with our product roadmaps, inaccurate renewals forecasts, and the worst cases can result in very unhappy customers!”

- Vendor asks, gently, “Do you get grief from these teams, as a result?”

- Prospect admits, “Yes, it’s added a lot more pressure to fixing this problem…”

- Vendor confirms and moves towards a discussion of solutions, “I see… So, this is really impacting the organization broadly. Let’s change gears back to your current manual process – are you looking to automate this largely following the existing workflow or do you have any other changes in mind?”

- Prospect says, “The individual steps are all fine, we just need to get rid of the manual work and physical hand-offs.”

Our vendor realizes that the prospect is unaware of the range of possible solutions and explores Vision Reengineering with the prospect:

- Vendor notes, “Interestingly, many of the other companies we’ve worked with found that the ability to both automate their workflows *and* implement rules-based processing and alerts not only eliminated the errors and handoffs, but also resulted in dramatically reduced churn and increased renewals – some of our customers report 10-20% less churn and 5-10% increases in renewals and add-on sales. Is a rules engine something that might *also* be useful in your practice?”

- Prospect responds, “Wow, I hadn’t thought about that – yes, that would be really cool! How does that work?”

We’ll leave the conversation at this point and let our vendor and prospect continue on their own…

Are You Leading the Witness?

Yes, absolutely…!

Expansion questions take advantage of vendor knowledge about other, similar prospects’ situations. Any time you know, from your experience, that another aspect of the prospect’s pain is likely, that’s a candidate for an Expansion Question.

Here are a few logical examples:

- “Manual processes” are likely to have errors (which propagate) and associated delays (which probably impact others).
- “Paper processes” are subject to similar issues, plus lost papers and transcription errors (what do these impact?).
- “Email communications” may suffer from lost or ignored messages and vague assignments (what happens then?).
- “False positives” can represent a world of pain on their own…!
- “Poor CRM hygiene” results in false forecasts, pipeline uncertainty, and scrambling Customer Success Managers.
- “Inaccurate documentation” can yield substantial rework, delayed invoicing, unhappy customers, and more.

And how about demos? What might an organization suffer if their demos are not as successful as desired? Hmmm – here are some Expansion Questions to contemplate for demos:

- Is your team communicating business value?
- Are they getting lost in the weeds with questions?
- Are the demos feature feature feature?
- Is delivery a conversation or a firehose? How long between speaker-switches?
- Are they doing sufficient Discovery before diving into the demo?

Expanding to 5 Levels of Discovery

In the brief example above, our vendor moved the prospect gently (but firmly) through five levels of Discovery, using Expansion Questions to drive the process:

Level 1: Uncovers statements of pain.
- Manual process.

Level 2: Explores more deeply.
- [Expansion Question] Vacations?

Level 3: Broadens the pain and investigates the impact:
- [Expansion Questions] Errors? Downstream impact?

Level 4: Quantifies.
- Reduce from 12 people to 2; eliminate weekly errors that take hours to fix.

Level 5: Reengineers vision.
- Introduces the "rules engine" using a Biased Question.

Expansion Questions, along with Biased Questions and related probing techniques, are fundamental Discovery skills – and are key components of a cohesive, integrated Discovery methodology.

Four Stages and Discovery

The classic set of Four Stages is particularly apropos for doing Discovery:

Stage 1: Unconsciously incompetent – they don't know what they don't know. Many (most?) sales and presales folks are in this category but are unaware…!
Stage 2: Consciously incompetent – they understand that they need to do better or operate differently, but don't know how to do so.
Stage 3: Consciously competent – they know what they need to do but have to think about it.
Stage 4: Unconsciously competent – they do the right things without extra thought.

Where are you and your team on this spectrum?

Do you know what you and your team don't know about doing Discovery? Contact us if you'd like to explore how you and your team compare with your peers…!

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