

### **LISTEN**

"So tell me a bit about this project. What is it, and when are you looking to have it done by?"

*This lets me just listen to them by asking the usual stuff before I dive further into their project.*

### **IDENTIFY THE TRIGGER**

"That sounds fantastic. Tell me a bit about how you came up with this project — what changed, or what happened, that made you realize, 'I need to do X'?"

*Here we want to know what event occurred to spark this project. Often times, this can be a series of built up events that is ultimately set off by something specific.*

### **HIGHLIGHT THE PROBLEM**

"OK, so \$TRIGGER happened and you decided to seek someone like me out. You wanted something fixed... Could you tell me more about what that something is? What is this project solving?"

*Remember: No project exists without a backing problem. Your competitors likely won't care enough to investigate what that problem is. If we know the problem, we can better tailor the project and what we end up doing toward that end.*

### **HOW PAINFUL IS THE PROBLEM?**

"That makes total sense. Before we go much further, I want to tell you a bit about how I work that might be a little different than most. I only want work on projects where I can deliver a ROI. We'll be able to figure out my costs once I know more about exactly what needs to happen to make this project a success and solve this problem, but do you mind sharing about what impact — financial, reputation, or whatever — \$PROBLEM is having on your business?"

*Here's where you'll also want to mention that you've come armed with a non-disclosure agreement. You respect their business, and you understand that it wouldn't be good for the world at large to understand the blood loss associated with this problem.*

### **WHAT'S THE COST?**

"Let's try to figure out what it means for your business to have this problem persist. What's the opportunity cost or the risk overhead of \$PROBLEM?"

*You want to understand what it means longterm for this problem to still be a problem. When we eventually go in for the sale, we're going to anchor the need for this project against the cost of this problem not going away. We want the prospective client to admit the cost to us.*

### **HOW SHOULD TOMORROW LOOK?**

"We don't want that happening. So let's move to a happier note — when we solve \$PROBLEM, describe what tomorrow looks like. What does it mean for your business to have this fixed? What sort of impact will it?"

*The question above was pretty painful... we're talking about how sucky this problem is. Now we want to switch gears and move into happier pastures. Let's let the client dream about*

*tomorrow. What does it mean if this project succeeds? Try to quantify in hard numbers what sort of impact your project might have on the client's business.*

### **TIE IT ALL TOGETHER**

“This was really valuable because this is going to help me better understand the *why* behind this project, which will help us together make sure that what I end up doing aligns perfectly with that end goal. Once we can figure out the total complexity of this project, I'll be able to provide you a quote, and as long as the net effect of this project on your business heavily outweighs the cost it'll make sense to talk about moving forward.”

*A few key things are happening here. Most importantly, we're really stressing our focus on their business and their financial well-being. We want them to be successful. We don't want our portfolio to be a graveyard of failed companies. From here, we'll be moving toward the estimation phase. This could, and probably should, be a paid Roadmapping session — but it could be doing just what you do now to furnish proposals.*

It's essential that you reference what you learned in this discussion throughout your proposal. Continue to anchor what you'll be doing and what it will cost with their business pains and how they're hemorrhaging money, reputation, or whatever matters to them.

Your job is to eliminate the pain and provide a solution. Your craft — that is, what you're good at — is just the vessel that gets them from the painful world of today to the land of milk and honey.