

CHESA | PROJECT AND CUSTOMER SERVICE TEAM

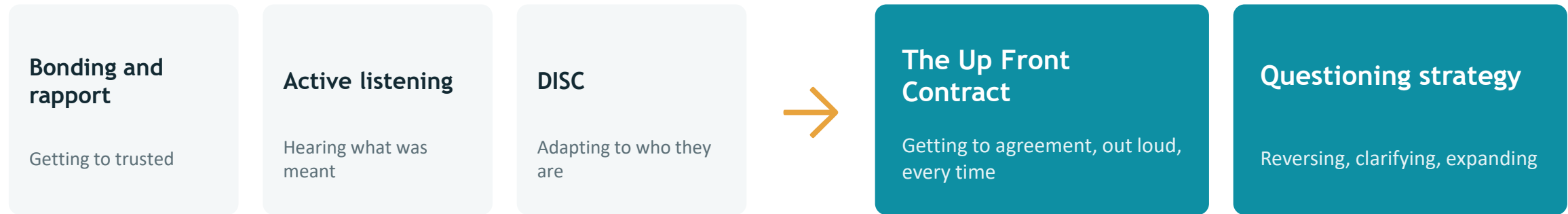
The Up Front Contract and the Art of the Question

Two tools that turn a customer conversation into a working agreement

Facilitated by Chris McDonell | McDonell Consulting Group

90 minutes | Session 2 of the customer connection series

Where we left off, and where we go today



Last session was about connection. This one is about control.

Not control of the customer. Control of the conversation, so that nobody walks away from a call with a different understanding of what was just agreed to. That gap is where scope creep, surprise escalations and awkward invoices are born.

Why this matters more in your seat



More

customer conversations happen after the sale than before it



Zero

quota behind what you say, which is exactly why they believe you



Every

unspoken expectation eventually becomes someone's escalation

The customer's real opinion of CHESA is formed by you.

The sale is a few conversations. The relationship is hundreds. Kickoffs, status calls, tickets, install days, go-lives, the call where something broke at 4:55 on a Friday. Every one of those is a chance to either build confidence or quietly spend it. These two tools are how you build it on purpose instead of by luck.



1

The Up Front Contract

Setting expectations out loud, before the conversation starts

35 minutes

Four ways an unspoken expectation costs you



Scope creep

"While you're in there, can you just..." Nobody said no, so it became part of the job.



The assumption

They believed something was included. You believed it was obvious it wasn't.



The surprise escalation

The problem was known for three weeks. It reached you as an emergency.



The drifting project

Two calls with no decision. Now the schedule is the customer's frustration.

Every one of these traces back to a moment where something was assumed instead of agreed.

The kickoff that wasn't

A MAM deployment kicks off on a Tuesday call. Eleven people attend. The agenda is "introductions and next steps."

The customer's post lead mentions their busy season starts in six weeks. Nobody writes it down.

CHESA walks through the architecture. The customer's IT director asks two questions about security review. The answer is "we can get you that." No date is set.

The call ends five minutes over. Everyone says thanks. No next meeting is scheduled on the call.

Three weeks later the customer emails: "Where are we? We were told this would be running before our season."

Three questions

- What was never actually agreed to?
- Where was the earliest moment this could have been prevented?
- What one sentence, said out loud on that call, changes the whole outcome?

What an Up Front Contract is, and what it is not

It is

- A mutual agreement on what this conversation is for
- Said out loud, at the start, in about 60 to 90 seconds
- An invitation for them to add to the agenda
- Permission to say the uncomfortable thing later
- Confirmed in writing after the call

It is not

- A script you read at them
- The statement of work or the contract legal signed
- A way to shut a customer down or box them in
- Something you only do on big formal calls
- Optional once you know the customer well

The five elements

1

Purpose

Why are we on this call

2

Their agenda

What do you need to leave with

3

My agenda

What I need to leave with

4

Time

How long we have, agreed up front

5

Outcome

What we decide, and what happens next

Number three is the one almost everyone drops.

You are allowed to need something from the call. A decision, a name, an approval, access, a date. If you never say it, you will not get it, and you will chase it by email for a week.

The outcome element, done properly

Weak

"Great, we'll follow up."

Nobody owns anything. No date exists. The next contact will be the customer chasing you.

Strong

"So by the end of today we'll either have a date for the security review, or we'll know who owns getting us one. Fair?"

A real outcome has three parts

1

A decision

Something is settled by the end of this call

2

An owner

A named human, not a team or a department

3

A date

Written down while everyone is still on the call

The same tool, five different moments



Project kickoff

Confirm the date they are really working back from, and who decides.



Weekly status call

Agree what a decision looks like today, not just an update.



Ticket intake

Agree on impact, urgency and what good looks like before you dig in.



Install or site day

Agree access, working hours, who signs off, what done means.



Go-live handoff

Agree what support looks like now, and who owns what going forward.

What it actually sounds like

PROJECT KICKOFF

"Thanks everyone. Here's what I'd like to get done in our 45 minutes. I want to walk you through how we'll work together, and I want to hear the dates and constraints on your side that we need to design around.

Before I start, what do you need to walk away with today so this call was worth your time?

What I need from you is two things: the date you're really working back from, and the name of the person who signs off when we're done.

If we get those, I'll send a recap this afternoon with who owns what. Sound fair?"

WEEKLY STATUS CALL

"We've got 30 minutes. I have two things that need a decision today, not just an update. What's on your list? And is there anything that's changed on your side since last week that I should know about?"

TICKET OR SUPPORT CALL

"Before I start digging, help me get this right. What's not working, what is it stopping you from doing, and what does fixed look like to you? Then I'll tell you what I can do today and what will take longer."

ACTIVITY ONE | BREAKOUT ROOMS

Build a contract for a call you have this week

How this runs

- Silent, on your own: 4 minutes. Pick one real upcoming call and write all five elements on page 6 of your workbook. No discussion yet.
- Breakout rooms of three: 10 minutes. Each person reads their contract out loud, as if the customer were on the line. Not summarized. Said.
- The other two answer one question: what would you still be unclear about if you were the customer? Capture what you hear on page 7.
- Fix your own wording before you come back.

Your five

- 1 Purpose
- 2 Their agenda
- 3 My agenda
- 4 Time
- 5 Outcome

Say it out loud. Reading it silently does not count.

14 minutes total

Debrief

What was the hardest element to write?

It will be My agenda. That is the point. Page 7 is where it goes.

Whose contract did you hear that you want to steal?

Get one person to read theirs to the whole room.

Where did you catch yourself being vague?

Vague usually means you are avoiding asking for something.

The half of the contract most people skip

Most of you already send a recap. The upgrade is making the recap mirror the contract, every time, in the same four blocks. Predictable structure means the customer actually reads it, and it becomes the thing you point back to when memories differ.

1 What we agreed

The decision, in the customer's words where possible

2 What I owe you

Item, and the date I will have it to you

3 What I need from you

Item, named person, and the date

4 Next touchpoint

Date and time, already on the calendar

2

Questioning Strategy

How to get the real answer instead of the polite one

35 minutes

The assumption trap

The more you know, the faster you assume.

You have solved this problem forty times. The customer starts describing it and you are already three steps into the fix. That speed is genuinely valuable, and it is also how you end up solving the wrong problem beautifully.

They say

What you still don't know

"The system is slow."

Slow how? Compared to what? Since when? For everyone or one person?

"We need this by Friday."

What happens Friday? Who told you Friday? What if part of it lands Friday?

"Can you just add this in quickly?"

Quickly for whom? What is driving it now? What does it replace on the list?

"We're not happy with how this went."

What specifically? When did it start? What would have made it right?

Three moves, in order



Clarify

Pin down a vague word before you act on it.

"When you say slow, what are you seeing?"



Expand

Get the rest of the story that did not come out first.

"What else has been going on with it?"



Reverse

Answer a question with a question, softened.

"Fair question. What's driving the timing?"

Most people jump straight to answering. These three all buy you information before you commit to anything.

Reversing

Answering a question with a question, softened so it never feels like deflection.

Why it works

- The first question is rarely the real question.
- Answering too fast commits you to a version of the problem you have not verified.
- The reason behind a question tells you more than the question does.
- It keeps you out of guessing, which is where wrong promises come from.

The two part structure

1**A softening statement**

Signals you are engaging, not dodging.

2**The question**

Short, open, and about their situation, not yours.

Without part one it sounds like an interrogation. With it, it sounds like care.

Softening statements you can use tomorrow

● *"That's a fair question."*

● *"Good that you raised that."*

● *"I might be able to help with that."*

● *"Before I give you a number I'd get wrong..."*

● *"So I don't guess..."*

● *"Help me get this right for you."*

● *"That's worth a minute."*

● *"I want to make sure I'm solving the right thing."*

Pick two that sound like you. Nothing here works if it does not sound like you.

Reversing in your world

"How long will this take?"



"Before I give you a date I'd get wrong, what are you working back from?"

"Is that included?"



"It might be. What made that come up now?"

"Can you just add this in quickly?"



"Possibly. What would that let you do that you can't do today?"

"Can you send someone on site?"



"We can look at that. What have you already tried on your end?"

"We need it by Friday."



"Understood. What happens Friday?"

"Why is this taking so long?"



"Fair, and I want to fix it. What were you expecting by now?"

When not to reverse



Not in an emergency

System down, air date at risk, live event. Answer, act, and ask your questions once it is stable.



Not before acknowledging emotion

If they are frustrated, the first thing out of your mouth is acknowledgement, not a question.



Not on a simple fact

If you know the answer and it is small, just answer. Reversing a fact question feels evasive.



Not twice in a row without giving

Two questions back to back and it becomes an interview. Trade: give something, then ask.

A question asked at the wrong moment does more damage than no question at all.

ACTIVITY TWO | BREAKOUT ROOMS

The reversing gauntlet

How this runs

- Groups of three. Rotate roles every round.
- Customer: read one line from the card on page 11, in character.
- CHESA: softening statement plus one question. Then stop talking. Write yours on page 12.
- Observer: did the softener sound natural, and did the question open or close?
- Six rounds, two each. Twelve minutes.

The one rule

You are not allowed to answer the question.

Not in this activity. Even if you know the answer. Even if answering would be easier.

The whole point is building the reflex of asking one more question before you commit to anything.

It will feel awkward. Awkward is the practice working.

15 minutes total

Debrief

What surprised you?

Usually: the customer kept talking, and what came out second was more useful than what came out first.

What felt uncomfortable?

Usually: the silence after your question. Sitting in it is the skill. Do not rescue them.

Turn to page 13 now and compare yours against the worked examples.

The connection back to part one

The up front contract is what earns you the right to ask these questions. When you have agreed at the start that you need something from the call, a direct question later is not an interrogation. It is the thing you already told them you would do.



3

What You See That Nobody Else Does

A first look at the conversation we will go deeper on next time

10 minutes

You are not being asked to sell anything

You are being asked to notice, and to tell someone.

No quota. No pitch. No closing. You are already inside the customer's environment seeing things nobody on the sales side will ever see, and most of what you notice never gets passed along.

What an AE sees

- What the customer chooses to tell them
- On scheduled calls
- Usually with a buying decision already framed

What you see

- The actual rack, the actual workflow, the actual mess
- Every week, on the ground, unfiltered
- Before anybody has framed it as a purchase

Signals you are already seeing



Storage or archive nearing capacity



LTO generation aging toward end of support



Someone doing the same task manually every week



A workaround you built that is holding something together



"We're standing up a new studio, control room or season"



New editors, new remote users, new headcount



Repeat tickets tracing to the same root cause



A neighbouring department asking if you can help them too



An end of support or renewal date you spotted in the field

Which of these have you personally seen in the last 90 days? Put it in the chat.

What to do with it

With the customer

One light sentence. That is all.

"I noticed your archive is running close to full. Want me to have someone look at whether there's a better long term answer than adding shelves?"

If they say no, you are done. You have still built trust, because you flagged something before it became their problem.

Internally

Tell the AE on that account. Three lines.

- What I saw, specifically
- What the customer said about it, in their words
- Whether they asked me to follow up or not

That is the entire handoff. You are not qualifying it, sizing it, or owning it. You are making sure it does not die in your inbox.

Next session we build this out properly. Today the ask is just: start noticing on purpose.

Three commitments, written in your workbook

1

One call this week

Name the specific call you will run a full up front contract on. Which call, which day.

2

One recap, four blocks

The next recap you send uses the four block format. Which customer gets it.

3

One reverse

One question you will answer with a question instead of an answer. Write the softener you will use.

Specific beats ambitious. One call, one recap, one question. That is the whole assignment.

The whole session in one line

Agree out loud at the start.
Ask one more question before you commit.
Write down what you agreed.

Thank you. Workbooks stay with you, commitment page comes back to me.