

Telling Growth Stories, PACE, and the Up Front Contract

Quick recap before we open PACE & UFC

August 17, 2026

When the work works, nothing happens

That is the whole problem. A quiet quarter looks identical to a quarter where nothing was ever at risk.



The invisible value paradox

Every threat contained is an event the client never experiences. Success erases its own evidence.



So the renewal question arrives

“What exactly are we paying for?” is not a pricing objection. It is a visibility failure.



Story makes it visible

Data reports what happened. Story makes them feel what almost happened, and they repeat it when you are not in the room.

THE GAP WE ARE CLOSING

75%

our renewal rate today



90%+

the benchmark

Fifteen points of preventable churn, most of it a story that never got told.

The spine: five beats

Call and response. If you cannot say these five from memory, you cannot tell the story without notes.

1

Situation

What was normal?

2

Threat

What went wrong?

3

Save

What did we do?

4

Cost Avoided

What did not happen?

5

Next Chapter

What is coming next?

Beat 4 is the one you skip

Cost Avoided is the counterfactual, and it is the only beat that speaks in the client's currency.

Beat 5 is not an ending

Next Chapter is where their risk is heading. That is the growth opening, and it is the baton in the alley-oop.

The same five beats, out loud

Told to a CISO mid cloud migration. Read it at pace: about forty seconds.

Situation	<i>Your team was mid migration to Azure, new identities spinning up daily, exactly the churn that hides a bad actor.</i>
Threat	<i>At 2:14 a.m. Tuesday our SOC flagged an MFA fatigue attack on a finance admin account. The credentials were already valid, one approval away from payroll.</i>
Save	<i>Within nine minutes our analysts isolated the session, forced a reset, and confirmed zero lateral movement, before your team finished their coffee.</i>
Cost Avoided	<i>An account takeover there usually means weeks of incident response, regulatory disclosure, and six figure recovery. None of it happened.</i>
Next Chapter	<i>As you fold in the EMEA acquisition next quarter, that identity attack surface roughly triples. Worth a conversation about extending coverage.</i>

Why it sticks: the exact time, the named attack, nine minutes, stakes in dollars, and a forward hook.

Same save, two altitudes

The story does not change. The altitude you tell it at is set by who is across the table.

TAM Technical credibility altitude

You are talking to practitioners.

- Alert volume and what got filtered before it reached them
- Dwell time and containment mechanics
- Analyst hours their team did not have to spend
- Coverage gaps you can see and they cannot

AM Business outcome altitude

You are talking to risk and budget owners.

- Board and audit exposure that never materialized
- Cyber insurance and regulatory disclosure avoided
- Downtime and revenue continuity
- Executive confidence in the security decision they made

The alley-oop: the TAM tells beats 1 through 4, and hands the AM beat 5.

Next Chapter is the pass. The AM does not need a new story, they need the one already told, at a different altitude.

Sixty seconds

Reading the beats is not the skill. Saying them without notes is.

THE DRILL

1. Pick one real save from an account you own, something the client has not heard.
2. Tell it to your partner in five beats, under sixty seconds, no notes.
3. Partner listens for one thing only: did Cost Avoided land in business terms?
4. Swap. Sixty seconds back the other way.

IF YOU GET STUCK

The beat you cannot fill is the assignment. It tells you exactly what to go find out on Monday.

THE TEST

Would your partner repeat this story to their own boss? If not, it is a report, not a story.

Two and a half minutes. Protect all of it.

Story is what you say. PACE is when you say it.

A great save story told at the wrong moment is a nice anecdote. Told on a rhythm, it is a renewal.

WHAT YOU LEAVE WITH TODAY

- Five beats you can say from memory
- Two story types, two jobs
- Cost Avoided in the client's currency
- Beat 5 is the pass to the AM

WHAT WE OPEN NEXT

- P** Prepare
- A** Align
- C** Cultivate
- E** Engage

The operating system that decides which client hears which story, and when.

This week: tell one save story to a client who never heard it.

Not at the renewal. Before it. Then bring what happened to the next session.



YOUR CLIENT SUCCESS OPERATING SYSTEM

A practical playbook for managing your day, your decisions, and your client conversations.

Everything you've learned - one repeatable system: PACE.

Why this matters for you



THE OUTCOME

Walk away with your own Client Success Operating System, built on PACE - a clear, practical guide to how you Prepare, Align, Cultivate, and Engage, so you operate with confidence and consistency instead of reacting to whatever comes in.

Clarify your system

How you actually operate

Skills → a rhythm

Repeatable, not one-off

Confidence for the marathon

Consistency over time

Without thinking...

ACTIVITY · 5 MIN

It's Monday morning. You log on. What's the very first thing you do?

Turn to a partner, share your answer, and discuss:

- Is it reactive - or intentional?
- What does that first choice drive in your day: clarity, or catch-up?

THE TENSION

For most of us, Monday starts with the inbox, the alert queue, or the escalation - whatever shouts loudest.

That single default sets the tone for the whole week.



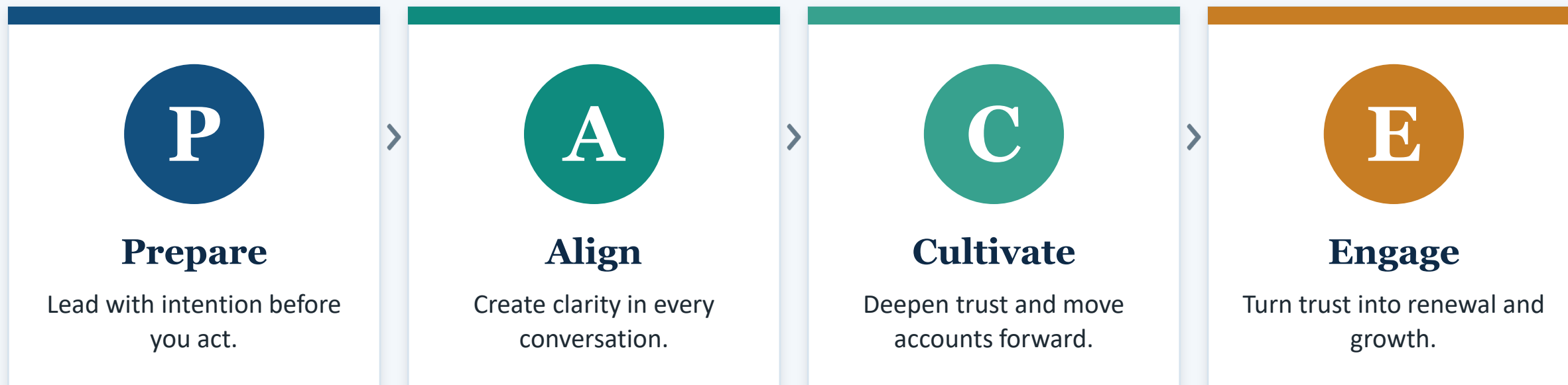
If you don't design your day...

your day will design you.

Client success in MDR is a marathon, not a sprint. Renewal isn't the finish line - it's a checkpoint in a multi-year partnership.

PACE

Four phases, one repeatable system, for every week and every account.



It's a loop, not a checklist - you run PACE every week, on every account, all the way to renewal and beyond.

P Prepare

Lead with intention before you act.

DISCUSS AT YOUR TABLE

How do you decide what deserves your attention before your day starts?

What does intentional preparation look like in your role?



THE TOOLKIT YOU'VE BUILT FOR THIS

- Success Triangle (Behavior · Attitude · Technique)
- Identity vs. Role
- Equal Business Stature
- Task vs. Outcome Ownership
- The Client—TAM/AM dynamic

Build your Prepare standard

WRITE · 2 MIN

Complete these in your workbook. Write specific, observable behaviors:

I start my week by deciding...

Before important client conversations, I clarify...

I know I'm being reactive when...

I know I'm operating intentionally when...



Create clarity in every conversation.

DISCUSS AT YOUR TABLE

Where does misalignment usually start in your conversations?

What do you avoid clarifying early that creates problems later?



THE TOOLKIT YOU'VE BUILT FOR THIS

- Up-Front Contract
- Define Success (Outcome · Metric · Timeframe · Owner)
- DISC & Elements of Communication
- Reversing · Summarize, Validate, Test
- Belief Wheel & Head-Trash
- Clear Future Commitments · Structured Follow-Up

Build your Align standard

WRITE · 2 MIN

Complete these in your workbook. Write specific, observable behaviors:

Every important conversation I lead will include...

I will not leave a meeting without...

If a conversation starts to drift, I will...

One thing I'll consistently do to create clarity is...



Deepen trust and move accounts forward.

DISCUSS AT YOUR TABLE

What separates maintaining an account from moving it forward?

What does a stagnant account look like?



THE TOOLKIT YOU'VE BUILT FOR THIS

- GLOW account diagnosis
- Six Components of Decision-Making
- Investigative Approach
- Leading & lagging indicators
- Pattern Interrupt · Acknowledge, Explore, Align
- Connect every conversation to business impact

Build your Cultivate philosophy

WRITE · 2 MIN

Complete these in your workbook. Write specific, observable behaviors:

To expand beyond my main contact, I will...

I'll proactively create new conversations by...

A stagnant account usually looks like...

To create momentum, I will...

Engage

Turn trust into renewal and growth.

DISCUSS AT YOUR TABLE

What holds you back from moving an account forward?

When does growth feel natural instead of forced?



THE TOOLKIT YOU'VE BUILT FOR THIS

- Point of View & the Save / Growth Story
- Business Story Structure (Current State · Gap & Impact · Direction)
- Action Orientation (Change · Continue · Finish)
- Building the Business Case · Leading to a Decision
- The alley-oop: TAM sets up, AM finishes

Build your Engage standard

WRITE · 2 MIN

Complete these in your workbook. Write specific, observable behaviors:

I introduce growth conversations by...

I know there's a real opportunity when...

If a client resists, I will...

Growth is valuable to my client because...

My Client Success Operating System

If someone shadowed you for a week, they would see that you...

P Prepare by...	A Align by...	C Cultivate by...	E Engage by...

Keep it simple and true. This one page is your operating system, the standard you'll run all year.



WRAP-UP

What pace will you run this year?

Client success isn't a sprint to renewal. It's a marathon toward trust and growth, run one intentional conversation at a time.

This week: use your PACE system to plan one full week, apply your standards in one client and one internal conversation, then refine. What will you do consistently to move your clients forward, one conversation at a time?

ESENTIRE · TAM / AM ENABLEMENT · DEEP DIVE

The Up-Front Contract

Thirty minutes on the most underused forty five seconds in your job

You already know the five parts. Today we work on the part that is hard: saying it out loud, on a real call, to a client who wants to jump straight in.

Same call, first fifteen seconds

One of these opens a meeting. The other opens a conversation you are leading.

WITHOUT A CONTRACT

“Hey, thanks for jumping on. I put a few slides together on last month, I will try to keep it quick and we can go from there.”

- No agreed finish line, so it ends when they get bored
- You handed them the agenda without meaning to
- “I will try to keep it quick” gives away the room
- Anything you needed to raise now needs permission

WITH A CONTRACT

“Before I open anything: I have got two things I want to cover and one decision I would like us to make. 30 minutes still good, and is there anything on your side we need to make room for?”

- A finish line both of you agreed to
- Their agenda is surfaced now, not at minute 25
- You are the one running the meeting, warmly
- Permission to raise the hard thing is already granted

Whoever sets the structure leads the relationship

This is not a meeting-hygiene tip. It is the mechanism that keeps a renewal from being a surprise.

It buys equal business stature

An order-taker asks what the client wants to cover. A peer proposes the frame and invites them to change it. Same warmth, completely different position.

It kills the mutual mystery

Most account damage is not a service failure. It is an expectation nobody said out loud, carried from Sales or assumed at onboarding.

It makes a “no” cheap and early

If they will not agree to your outcome up front, that is the most useful information in the call. Better now than in the last two weeks of the term.

THE THROUGH LINE

45

seconds at the top of a call

Every renewal we lose was preceded by a series of conversations where nobody agreed on what the conversation was for.

75% → 90%+

Every one of these needs one

If it has a start and a finish and another human being in it, it takes a contract.

Onboarding kickoff

The single highest leverage one. Sets the operating rhythm for the whole term.

Monthly or weekly check-in

Stops the standing call from decaying into a status read-out nobody needs.

Quarterly business review

The one most often run without a contract, and the one with the most at stake.

Post-incident review

Tension is highest and structure matters most. Contract the tone, not just the agenda.

Renewal conversation

Contract the decision itself, including that a no is an acceptable outcome.

The TAM to AM handoff

Contract the pass. Who is joining, what they will hear, what you want decided.

Email and Slack

A written contract is still a contract. Often the only one you get with a busy client.

Mid-meeting, when it drifts

Recontracting is legal. You can reset the frame at minute twenty.

A client should never wonder what a meeting with you is for. Not once, across an entire term.

P T R R O

Five short agreements, made before the content starts, in under a minute.



Purpose

Why are we meeting?

"Two things I want to cover, and one decision I would like us to make."



Time

How long, agreed by both?

"Thirty minutes still work, or has something moved on your side?"



Their Role

What do you need from them?

"What I would need from you is a straight read on how this is landing above you."



Your Role

What will you do?

"I will bring the numbers and be honest where I think we are exposed."



Outcome

What does done look like?

"By the end I would like us to land on a yes, a no, or a clear next step."

The two most skipped are Their Role and Outcome. Skip Their Role and you get a passive client. Skip Outcome and you get a pleasant call that changes nothing.

It has to sound like you, not like a process

The structure is rigid. The language is not. Two habits keep it human.

1. Soften the front edge

A.N.O.T. openers take the edge off without weakening the ask.

- Appreciate** *"I appreciate you making the time, so let me be useful with it."*
- Naturally** *"Naturally you will want to bring your own items, so tell me those first."*
- Obviously** *"Obviously your team knows this environment better than I do."*
- Typically** *"Typically these run best when we agree the decision up front."*

2. Ask, do not declare

A contract only holds if they agree to it. End every one with a check.

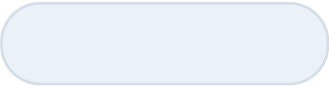
"Fair enough?"

"Does that work for you?"

"Anything you would add or move?"

"Is that a reasonable place to land?"

A contract they did not agree to is just an agenda you announced.



TAM

The standing monthly call

Thirty minutes on the calendar every month. It has quietly become a dashboard read-out.

P Purpose	<i>“I would like to use our time on two things: what we caught and contained since we last spoke, and then your read on the two coverage gaps I flagged in the portal.”</i>
T Time	<i>“You have got thirty minutes booked. Does that still hold, or has something moved on your side today?”</i>
R Their Role	<i>“What I would need from you is candour on what your team is actually experiencing day to day, especially anything that is noisy or getting ignored.”</i>
R Your Role	<i>“What I will do is bring the numbers, and be straight with you about where I think we are exposed rather than just showing you green.”</i>
O Outcome	<i>“By the end I would like us to agree on one thing to change before next month, or agree there is nothing to change. Either is a good outcome. Fair enough?”</i>

Notice: the Outcome makes “nothing to change” a legitimate answer, so the client does not feel sold to.

The hard one: after an event

TAM

Tension is high, their team is defensive, and someone above them is asking questions.

P Purpose	<i>“I want us to walk Tuesday's timeline together: what we saw, when we saw it, what we did, and where the handoff to your team could have been faster.”</i>
T Time	<i>“I have got forty five minutes held. If we need more, I would rather book a second session than rush the last part, which is the part that matters.”</i>
R Their Role	<i>“What I would ask from you is to push back hard wherever our account does not match what your team experienced. I would rather hear it now than read it later.”</i>
R Your Role	<i>“What I will do is bring the complete timeline, including anything we could have done better. I am not here to defend, I am here to fix.”</i>
O Outcome	<i>“We leave with an agreed timeline, a short list of changes on both sides, and an owner and a date against each one. Does that sound like the right target?”</i>

Notice: the contract sets the tone, not just the agenda. “I am not here to defend” is doing more work than any slide in the review.

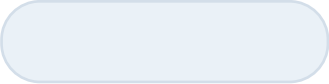
The QBR that has to earn its hour

AM

An hour booked, their CFO joining at the half hour mark, and the budget under review.

P Purpose	<i>“Two things today: what your investment bought you this quarter in risk that never reached your desk, and what is changing in your business next quarter that we should be covering.”</i>
T Time	<i>“We have got the hour, and I know Priya joins at the half hour. I will make sure the part she needs is waiting for her.”</i>
R Their Role	<i>“What I would ask from you is a straight read on how this spend is being viewed above you, including if it is under scrutiny. I would rather work with that than around it.”</i>
R Your Role	<i>“What I will bring is the honest picture, including anywhere I think you are paying for something you are not using.”</i>
O Outcome	<i>“By the end I would like a clear yes or no on extending coverage to the two new sites. If it is a no, I want to understand what would have to be true. Reasonable?”</i>

Notice: naming the exec by name and planning for her arrival is Equal Business Stature in one sentence.



AM

The one people open too late

Ninety days out. The instinct is to wait. The contract is what lets you go early.

P Purpose	<i>"I would like to have the renewal conversation now rather than in the last two weeks: what has worked, what has not, and what the next term should look like, which may be more or less than today."</i>
T Time	<i>"Forty five minutes, and I do not need all of it if we get there faster."</i>
R Their Role	<i>"What I would ask is that you tell me where you are genuinely undecided, and who else has a vote in this that I have not met."</i>
R Your Role	<i>"What I will do is give you a fair read and not chase you. If this is not right for you next year, I would rather know now and part well than find out in November."</i>
O Outcome	<i>"By the end, one of three things: we are moving forward, we are not, or we know exactly what is still open and who decides it. Any of those works for me. Which feels most likely today?"</i>

Notice: making the no genuinely acceptable is what makes the yes real.

Most of yours will happen in writing

A contract in an email works, and it does something a spoken one cannot: it gives them time to change it.

Subject: Thursday 10:00, 30 min, agenda below

Hi Dana,

Ahead of Thursday, so we use the time well:

What I want to cover: the two detections from the migration window, and the coverage question on the Boston site.

How long: thirty minutes, and I will hold us to it.

What would help from you: your read on whether the Boston timeline has moved.

What I will bring: the detection detail and a straight recommendation, including the option of doing nothing.

What I would like to leave with: a decision on Boston, or a clear owner and date.

If any of that is off, reply and I will adjust before we meet.

WHY THE WRITTEN ONE IS UNDERRATED

- It survives the client forwarding it to someone above them
- It gives them a low friction way to change the agenda before you are live
- Silence becomes a soft yes, so you open the call already contracted
- It is the only contract you get with a client who never takes a meeting

What is missing here?

Both of these are real openings. Both are broken. Find the missing parts, then fix one out loud.

A · TAM opening a monthly call

"Hi everyone, thanks for jumping on. I have got a few slides on last month's numbers, I will try to keep it quick, and then we can go from there."

B · AM opening a renewal call

"I wanted to grab thirty minutes to walk through the renewal and get the paperwork lined up before quarter end."

In pairs, three minutes

1. Name which of the five parts are missing from each one
2. Pick the one closer to how you actually open, and rewrite it out loud
3. Partner listens for one thing: is there a real question at the end?

Build one for a real call this week

Not a hypothetical. Pick a call already on your calendar in the next seven days.

P Purpose

Two things I want to cover, and the one decision I want made.

write it

T Time

How long, and the check that it still works for them.

write it

R Their Role

The one thing only they can give me. Be specific.

write it

R Your Role

What I commit to, including the uncomfortable honesty.

write it

O Outcome

Yes, no, or a named next step with an owner. Plus my check question.

write it

The discipline: full sentences, in your own words

Bullet points do not survive contact with a live call. If you cannot write the sentence, you will not say it.

Stuck on Outcome?

Ask what has to be different by Friday because this call happened.

Practice

Written is not the same as spoken. This is the rep that actually transfers to Monday.

THE DRILL

1. Deliver your contract to your partner in under sixty seconds, no reading.
2. Partner plays the client and pushes back once: “Can we just jump in? I am tight on time.”
3. Recover, do not abandon it. Compress to fifteen seconds and keep going.
4. Swap, then each give one specific piece of feedback.

THE FIFTEEN SECOND VERSION

“Totally. Two things and one decision, fifteen minutes, and I need one straight answer from you. Good?”

SCORE YOUR PARTNER ON ONE THING

Did they end with a real question, and did they actually stop talking and wait for the answer?

Five minutes. This is the whole session. Protect it.

Four things that will happen this week

None of them mean the technique failed. Each has a move.



“Let us just jump in, I am short on time.”

“Absolutely. Give me twenty seconds so we do not run out of time on the part you care about.”



Minute twenty and you are still on one topic.

Recontract: “We have spent all of it here, which may be right. Keep going, or park it and take the coverage question?”



An exec drops in halfway through.

Re-run a fifteen second contract for them. They just joined a meeting they know nothing about.



They will not agree to your outcome.

That is the meeting. Stop and ask what would need to be true, and take that answer over the agenda you planned.

You are allowed to recontract at any point. The frame is yours to reset, not theirs to keep.

Nobody ever regretted the forty five seconds

The technique is not hard. Doing it when you are rushed is hard. That is the whole discipline.

WHAT YOU LEAVE WITH

- Five parts, and the two everyone drops
- Four written samples across both roles
- A contract for a real call this week
- The fifteen second version for when they push

AND ONE THING FOR THE ALLEY-OOP

TAMs: build the pass into your own Outcome.

“One of the outcomes I would like is to agree whether it is worth bringing Sarah into a coverage conversation before the term is up.”

The contract is where the pass gets set up, out loud, with the client's agreement already in hand.

This week: a spoken up-front contract on every client call. Every one.

Write it before you dial. Bring one that went badly to the next session, those are worth more than the ones that went well.

WRAP-UP

Thank you!

Share your Actions and Commitments and your Feedback!

Scan the code to submit your feedback.

eSENTIRE

