FIELD NOTES 01 / DISCOVERY

Discovery doesn’t end when the deal closes

A practical approach to understanding customers throughout the relationship.

A sales handoff captures the customer at a particular moment. Priorities can change, implementation can reveal new needs, and an unexpected workflow can become valuable. Ongoing discovery keeps the account team’s understanding connected to what the customer needs now.

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THE CORE IDEA

Understand the customer → Put learning to work → Keep the next step clear

FIELD NOTES 01 / SECTION 01

01. Start with the discovery that has already happened

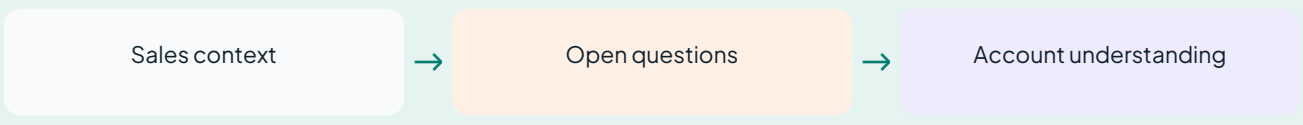
Before the first customer conversation, review what the account executive learned during the buying process. Contracts, notes, and the primary use case are useful, but they rarely explain every decision or deferred need.

Ask about the context behind the purchase and the opportunities that did not enter the original agreement. Use these as questions to explore over time, rather than treating every mention as a qualified opportunity.

- Did another team or office come up during the sale?
- Which use cases were deliberately left for later?
- Are other platforms handling work this product might support?
- What mattered to the customer but was outside the initial scope?
- Who influenced the decision, and what mattered to each person?

> Build on what the customer has already shared so the relationship does not start from zero.

FIELD PATTERN / 01



FIELD NOTES 01 / SECTION 02

02. Protect the original customer's priorities during onboarding

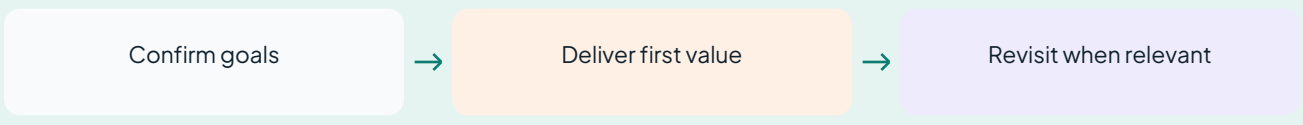
The team that purchased the platform comes first. Confirm its goals, establish the implementation plan, and help it reach a meaningful result before pushing for a broader scope.

Once those priorities are clear, a light discovery question can add useful planning context: "Is there anyone else who might eventually use this workflow or depend on its output?"

Some customers will share more; others will want to focus on their own team. Respect that boundary, record it, and reassess only when something relevant changes. A reminder is a prompt to reconsider the context, not an instruction to repeat the same question.

> Successful onboarding earns the right to explore what comes next.

FIELD PATTERN / 02



FIELD NOTES 01 / SECTION 03

03. Turn discovery into useful outreach

Document customer pain points clearly enough to support a relevant conversation later. Meeting-note tools can organize those observations, and an AI-assisted workflow can retrieve approved guidance and prepare a draft for review.

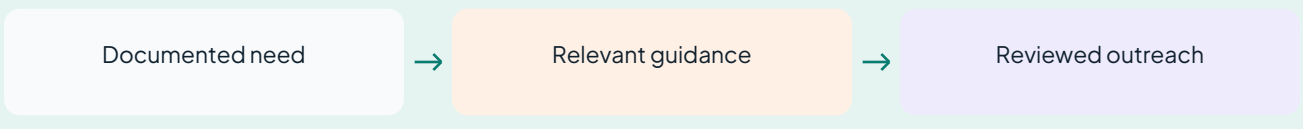
Keep each message focused on one pain point. Connect a current resource or example to the customer's situation, then ask whether the issue still matters and suggest a useful next step.

Drafting ahead can help, but review the account context before sending. A previously relevant problem may have changed. The customer's response is new discovery: it may confirm the need, reshape it, or reveal another stakeholder.

- Choose one documented pain point.
- Find current guidance or a relevant example.
- Explain the connection to this customer.
- Suggest one clear next step.
- Check relevance, accuracy, and tone before sending.

> Replace a generic check-in with a useful reason to speak.

FIELD PATTERN / 03



FIELD NOTES 01 / SECTION 04

04. Build a stakeholder map throughout the relationship

The main contact may not hold the full picture. Managers and directors can explain departmental priorities, parallel teams, and upcoming initiatives. Users can show how the product fits into daily work, where it creates friction, and which workarounds remain.

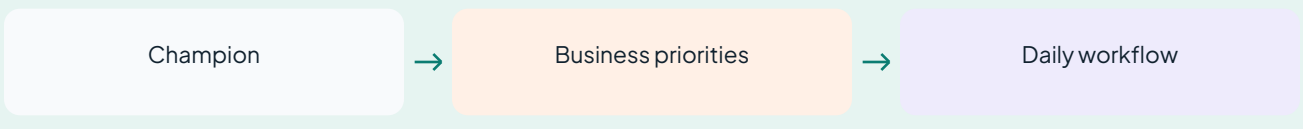
Match the conversation to the question. Explore broader organizational needs with people who have that visibility; investigate how a workflow operates with the people doing it.

An introduction should have a purpose that can be explained to the existing contact. Strengthen the relationship by being transparent about whose perspective is needed and why. Do not use discovery to work around a contact who has set a boundary.

- Record each stakeholder's role and goals.
- Distinguish decision-making context from day-to-day workflow knowledge.
- Explain the purpose of introductions.
- Keep the existing champion involved.

> Different stakeholders provide different evidence. Both the business view and the user view matter.

FIELD PATTERN / 04



FIELD NOTES 01 / SECTION 05

05. Use milestones to revisit what is known

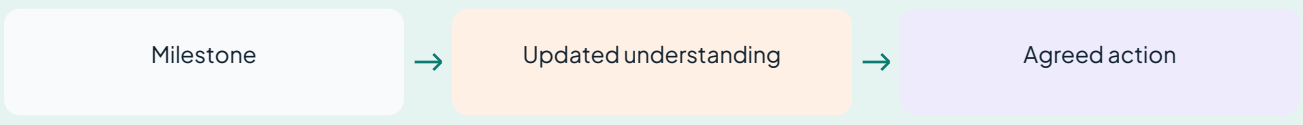
Meaningful milestones create natural opportunities to reopen discovery. A review around the middle of an annual agreement may be useful, but the timing should follow the customer's progress rather than a universal calendar rule.

Use these conversations to understand outcomes, changed priorities, missing perspectives, and obstacles. They can uncover growth opportunities, but they can also reveal a value gap or a reason the customer may not renew.

- After implementation: What can the team do now that it could not do before?
- During adoption: Where is the workflow still difficult?
- During a business review: Do the results reflect the original goal?
- For a new use case: Who owns the problem, and what would need to change?
- Before renewal: What would create confidence in continuing the investment?

> Ask while there is still time to act on the answer.

FIELD PATTERN / 05



FIELD NOTES 01 / SECTION 06

06. Connect the commercial conversation to customer value

A commercially capable CSM should be comfortable exploring growth. The test is whether a recommendation follows from the customer's needs and the value already delivered.

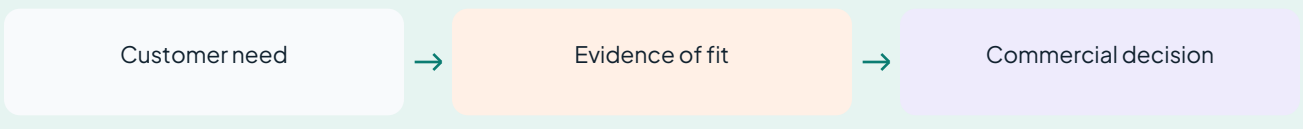
Interest from another team is a reason to explore. A feature request is a reason to ask questions. Neither establishes the fit, readiness, or implementation effort required for an expansion.

Before recommending more, understand the problem, the people involved, the fit, and the work needed to make it useful. Sometimes the right next step is expansion. Sometimes it is helping the original team succeed with what it already purchased. Accountability continues in either case.

- Confirm the need and who owns it.
- Validate value from the current agreement.
- Check solution fit and implementation readiness.
- Recommend the next step the evidence supports.

> Growth is a possible result of good discovery, not its predetermined answer.

FIELD PATTERN / 06



FIELD NOTES 01 / SECTION 07

07. Prepare for the next customer milestone

Use a short preparation checklist to keep discovery practical. Review the account record before the conversation and update it afterward.

Separate what the customer confirmed from assumptions that still need testing. Record new learning, unresolved questions, and an agreed action with an owner and timing.

AI can help organize notes, retrieve approved material, and prepare drafts. The team still decides what to ask, when to ask it, and whether a recommendation fits.

- Why did the customer buy?
- What value can be substantiated?
- What remains unresolved?
- What has changed since the last conversation?
- Whose perspective is missing?
- Which question will clarify the next priority?
- What previous action needs a follow-up?

> Discovery remains useful only when new understanding changes the next action.

FIELD PATTERN / 07

