FIELD NOTES 02 / CUSTOMER VALUE

Make customer value visible

Use adoption data and customer conversations to build a shared understanding of value.

A customer can complete implementation and use the product successfully while the reason for the investment fades into the background. Stakeholder changes and budget reviews make a shared understanding of value especially important. Build that understanding throughout the relationship.

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THE CORE IDEA

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

FIELD NOTES 02 / SECTION 01

01. Keep the original reason for buying in view

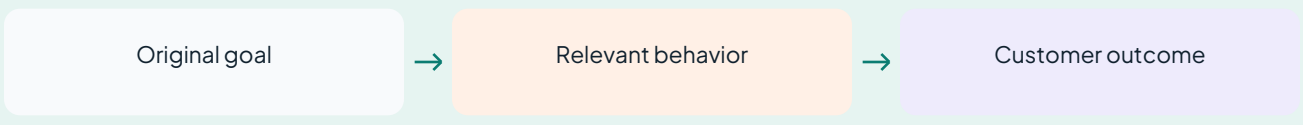
After implementation, check whether the platform is becoming part of the customer's work in the way intended. Return to the needs established during discovery rather than relying on general activity numbers.

Adoption data becomes useful when it helps explain progress toward a customer objective. A broad usage figure may provide context, but a specific workflow or team can matter much more to the investment decision.

- What problem was the customer trying to solve?
- Which team or workflow was affected?
- What was expected to become easier, faster, or more effective?
- How would the customer recognize that improvement?
- Is that workflow taking hold, and is it helping?

> An activity metric needs a customer objective to give it meaning.

FIELD PATTERN / 01



FIELD NOTES 02 / SECTION 02

02. Surface useful observations before a review is due

Once implementation is complete and the team has worked independently, share an observation that can open a useful discussion. Depending on the product, that may be one or two months later. Address an issue sooner if it needs attention.

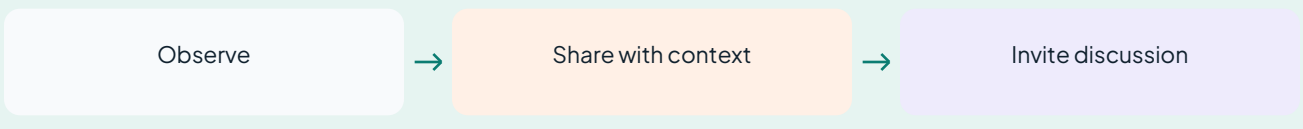
A simple visual showing who is using the platform or how adoption is developing can help a champion understand the pattern and share it internally.

Begin with the champion and keep them involved when considering a wider audience. Ask whether a director would benefit from seeing the information and offer to explain its context. The next step is a conversation about meaning, not merely sending a chart.

- Choose an observation relevant to the original objective.
- Show the period and the population covered.
- Explain limitations and possible context.
- Ask the champion who else should be involved.

> Make the observation useful to the customer before making it a reporting routine.

FIELD PATTERN / 02



FIELD NOTES 02 / SECTION 03

03. Ask for a response, not just a receipt

Sending a positive trend does not establish that the customer sees value. Ask how the observation relates to the team's experience.

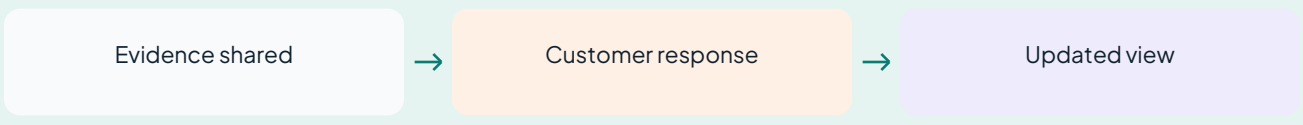
A useful prompt connects the evidence to the original goal: "Usage is becoming more consistent among the people working on [workflow]. Is this helping with [problem] in the way expected? What feedback has the team shared?"

Leave room for any answer. The customer may confirm a benefit, explain a limitation, or report that people are using the platform but still struggling. Each response improves the account team's understanding.

- State the observation without overclaiming.
- Connect it to the customer's stated goal.
- Ask for feedback or interpretation.
- Record what the customer confirms or challenges.

> A value conversation needs an exchange, not just a delivery receipt.

FIELD PATTERN / 03



FIELD NOTES 02 / SECTION 04

04. Validate the connection between usage and value

Usage is an observation. Its meaning depends on the workflow. High usage can indicate adoption, or extra effort needed to finish a task. Low usage can indicate disengagement, or a reliable process that needs little manual intervention.

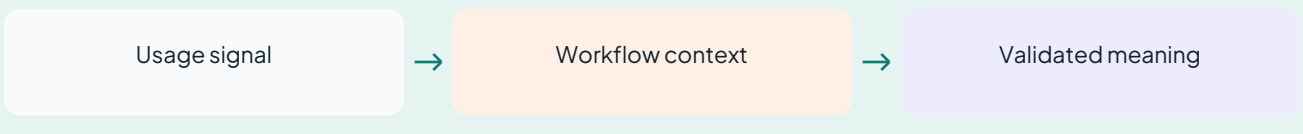
For a largely automated workflow, identify what successful operation looks like and how it can be verified. Do not assume that fewer logins mean less value.

The objective is to connect observable behavior to the result the customer intended. Customer conversations help close the gap between platform activity and impact inside the organization.

- Is the team completing the intended work?
- Has the process improved?
- Where is effort or a workaround still needed?
- What evidence does the customer use to judge success?

> Validate the interpretation before presenting usage as proof of value.

FIELD PATTERN / 04



FIELD NOTES 02 / SECTION 05

05. Bring declining usage into the conversation early

A decline after implementation is a reason to investigate while there is still time to respond. Share the observation, connect it to the original goal, and ask whether the team is still achieving the intended outcome.

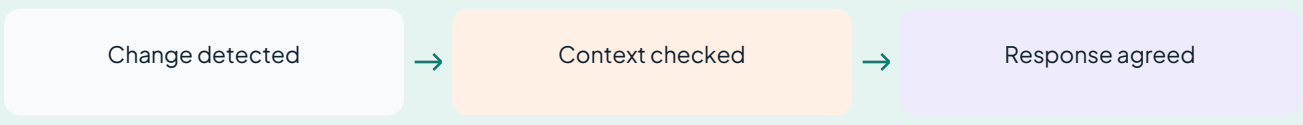
Look for context before drawing a conclusion: time off, seasonality, a completed project, a changed team, or a workflow that now needs less effort. A genuine adoption issue is another possibility.

Explain what is known and ask about what remains unclear. If the conversation identifies a gap, agree an action, an owner, and a date to revisit it.

- Confirm the trend and its time period.
- Check known organizational or seasonal context.
- Ask whether the intended outcome is still being achieved.
- Agree a response and review date if a gap exists.

> A declining number is a prompt for discovery, not a diagnosis.

FIELD PATTERN / 05



FIELD NOTES 02 / SECTION 06

06. Build a value history that survives stakeholder changes

A new decision maker needs a useful account history. Keep goals, progress, customer-confirmed benefits, unresolved issues, and responses to change somewhere the account team can find them.

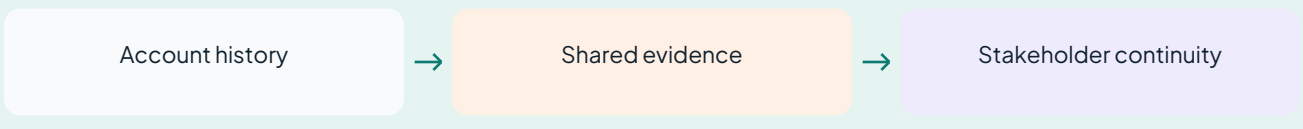
Distinguish what the data showed from what the customer confirmed and what still requires investigation. A new stakeholder can then assess whether those outcomes match current priorities.

The same record makes renewal preparation more grounded. It provides a storyline supported by conversations over time rather than a last-minute attempt to demonstrate impact.

- Why the customer bought.
- What happened during implementation.
- How adoption developed.
- Which benefits the customer confirmed.
- What remained unresolved.
- What changed and how the team responded.

> Document the evidence and the interpretation, not just the latest score.

FIELD PATTERN / 06



FIELD NOTES 02 / SECTION 07

07. Match the work to the complexity of the account

Enterprise accounts may require separate value conversations across teams, regions, and stakeholder groups. One team can be achieving results while another is still implementing. An account-wide average can hide both stories.

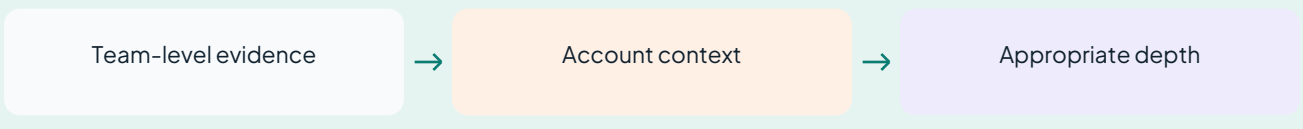
When implementation occupies a substantial part of the contract, record progress without implying that future outcomes have already been achieved.

The process may be simpler for SMB and mid-market accounts. The principle is the same: understand who needs to recognize the value, what evidence matters to them, and which objectives are still outstanding.

- Segment the evidence by relevant team or workflow.
- Show achieved progress separately from future expectations.
- Match the depth of the review to the account.
- Make the next value conversation useful to its audience.

> The level of detail should follow the customer's complexity.

FIELD PATTERN / 07



FIELD NOTES 02 / SECTION 08

08. Use a checklist for the next value conversation

Before reaching out, connect the observation to a customer objective and decide what response or action is needed. Afterward, record the customer's view and the commitments made.

Product teams may keep improving the platform, but each customer still needs to understand which changes matter to its own work.

Renewal, expansion, and pricing discussions become more grounded when both sides can refer to value already discussed, including limitations and unresolved needs.

- What objective is this connected to?
- What do the numbers show, and over what period?
- What context could explain the pattern?
- What can be substantiated?
- What needs customer confirmation?
- Who should be part of the discussion?
- What response or next step is being requested?

> A shared understanding of value is built over time.

FIELD PATTERN / 08

