

# EXECUTIVE

## DISCUSSION GUIDE

This guide turns the book into one working conversation with your leadership team — not a book report. Run it once, together, after Sales, Delivery, and Customer Success leadership have all read at least Chapters 1–3. Budget 60–90 minutes. Bring real accounts, not hypotheticals.

### WHO SHOULD BE IN THE ROOM

- CEO or owner
- Head of Sales
- Head of Delivery / Service Operations
- Head of Customer Success or Renewals
- CFO or COO, if your organization measures departments separately (optional but recommended)

### GROUND RULE — READ THIS OUT LOUD BEFORE YOU START

***“Fault points backward at a person. Alignment points at a seam you can actually fix.”***

*If this conversation turns into who dropped what, stop and reread that line. The point of this meeting is to find the seam, not the culprit.*

### AGENDA

| Time   | Segment                                  | Who leads                     |
|--------|------------------------------------------|-------------------------------|
| 30 min | Part 1 — Test the four hurdles           | CEO/owner                     |
| 20 min | Part 2 — Run the alignment question live | Whoever owns the escalation   |
| 15 min | Part 3 — Assign the three moves          | CEO/owner                     |
| 10 min | Confirm owners, accounts, and dates      | Whoever runs the next meeting |

## Part 1 – Test the four hurdles

Each of these beliefs sounds reasonable. That's what makes them dangerous. Go around the room and answer each one honestly, out loud, before moving to the next.

### HURDLE 1

#### ***"Let's improve Delivery first."***

A better Delivery function just gets you to the wrong finish line more efficiently if Sales, Delivery, and the customer would each describe success differently.

##### **Bring to the table:**

- Name one struggling account from the last year. Did you respond by tuning a single department without first checking whether Sales, Delivery, and the customer agreed on what success meant?
- Have Sales, Delivery, and Customer Success each say – independently, out loud – what "success" means for that account. Compare the three answers.

### HURDLE 2

#### ***"Our customers are happy. Our SLAs are green."***

You can meet every line of a contract and still lose the customer. Compliance is what SLAs measure. Loyalty lives somewhere no dashboard looks.

##### **Bring to the table:**

- Pick your three largest accounts. For each, have each leader independently answer: is this customer's confidence rising, flat, or being quietly spent – without looking at the SLA report first.
- Compare answers. Where the room disagrees, that disagreement is the finding.

### HURDLE 3

#### ***"Whose fault is this?"***

Blame assumes the failure lives inside one function. Most of the time it lives in the space between them, where nobody was responsible for keeping the promise, the expectation, and the execution together.

##### **Bring to the table:**

- Bring the last account escalation that turned into finger-pointing.
- As a group, rewrite the central question from "who dropped this" to "where did what we promised, what they expected, and what we delivered stop matching?" Notice how different the answer is.

### HURDLE 4

#### ***"Once we get through this renewal, we'll fix it."***

By the time customer trouble is visible enough to make you want to wait, the customer has usually already started changing how they behave.

##### **Bring to the table:**

- Name one issue on a key relationship that the room has agreed to address "after the renewal."
- Ask honestly: if that customer's confidence is already slipping, will there be a renewal left to fix it after?

## Part 2 – Run the alignment question live

Bring one real, recent escalation into the room – something that already happened, not a hypothetical.

***“Where did what we promised, what they expected, and what we delivered stop matching?”***

Ask that question in front of the whole room and write the answer somewhere everyone can see it. Nobody gets defensive, because nobody is being hunted for fault – the room is looking for a seam, not a suspect.

*The escalation we're using*

*Where alignment actually broke down*

*Who is closest to that seam and should own closing it*

## Part 3 – Leave with three assigned moves

These are the same three moves from the end of the book. Assign an owner and a date before the meeting ends – not “someone should do this,” a name.

| Move                                                                                                                | Owner | Account | By when |
|---------------------------------------------------------------------------------------------------------------------|-------|---------|---------|
| Run the success comparison from Chapter 9 on one account                                                            |       |         |         |
| Read behavior, not the dashboard – report back on who the customer calls first, and what gets ignored               |       |         |         |
| Remove one point of friction this week – the request that bounces between teams, the update that takes three emails |       |         |         |

## Before you close the meeting

*Put a date on the calendar to review these three moves – same room, same people*

*Decide who owns the space between departments on your largest account going forward*

**Want someone outside the org chart to run this conversation with you? Book an Outcome Execution Gap Session – we facilitate this exact discussion using your real accounts.**

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