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B2B conversations: from needs to a shared next step

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Prepare hypotheses, not ready-made answers

Before the conversation, note which challenge might matter to the customer and what supports your assumption. Treat it as a question to explore together. This lets you use your preparation without imposing a diagnosis. Distinguish known facts from assumptions.

Understand the impact of the problem

Ask where the problem shows up, who it affects and what happens as a result. A slow process only becomes a meaningful sales issue when its consequences are understood. Is time being lost? Are decisions delayed? Is rework necessary? Let the customer describe what improvement would look like.

Clarify how the decision will be made

An enthusiastic contact does not yet mean a shared buying decision. Ask about participants, evaluation criteria and approvals. Whose perspective is missing? Who needs to assess value and effort? What information is required? These questions help you align the next step with the actual decision process.

Summarise your understanding so it can be checked

Reflect the problem, desired impact and open questions back to the customer. Explicitly invite corrections. A short, jointly confirmed summary is more useful than a long presentation built on uncertain assumptions. Also record what you do not yet know.

Agree a next step with a clear purpose

A follow-up meeting should answer a specific question. Agree what needs clarifying, who should take part and what preparation is required. For example, another subject-matter expert might join to test a value assumption. Do not promise results you cannot yet substantiate.

Reflect on your contribution

After the conversation, ask: Do I understand more than before? Has the customer gained clarity? Does the next step make sense to both sides? If you cannot answer, a targeted follow-up question may help. The number of conversations alone says little about your value in the decision process.