

Automation + Listening Playbook

Intentional automation creates a seamless experience & eliminates repetitive manual work, freeing time for “truth-sparking” questions + deep listening techniques that reveal hidden opportunities & risks.

Onboarding

Building trust
& alignment

QBRs

Continued engagement
& alignment

Renewals

Revealing
insights

INTENTIONAL AUTOMATION

Tactics to try:

- Automated handoff emails: sales rep to CSM
 - Internal & customer-facing intro
- Welcome email with kickoff scheduling
- In-app walkthroughs to guide firsts & setup
- Group implementation



Tactics to try:

- Automate QBR content
 - Auto-populated PDF or video (CSM recorded or AI)
- Send to customer at least 1 week prior
- Use the time to talk about more important things



Tactics to try:

- Gather desired outcomes and/or renewal intention 6+ months prior
 - Survey or email reply request
- Renewal notifications
 - Customer-facing & internal



DEEP LISTENING

Truth-sparking question:

“If I could sneak into your next board or leadership meeting, what do you think is the top priority/challenge they’re working on for the next year or so?”

Deep listening technique:

Start the conversation with a quiet mind & an open aperture.

Truth-sparking question:

“What’s the biggest thing that has surprised you since you started working with us?”

Deep listening technique:

As soon as you ask the question, hit the “mute” button!

Truth-sparking question:

“If you got outreach from our competitors tomorrow, how would you react on a scale of 1 (ignore) to 5 (probably get back to them to learn more)?”

Deep listening technique:

Embrace the silence. Listen for “verbal ellipses,” which may indicate they have more to share!