Podcast Script: 3 Levels of Why?

Welcome to this 60 second Sugar snippet. My name is Susie Williams. Have you ever gotten an oddball customization request? Of course you have. Have you ever implemented an oddball request without really understanding the underpinnings of it? You have? Well, today we're going to talk about a great technique you can use to determine the real reasons your users are asking for those oddball customizations.

The technique we're going to be talking about is called "The Three Levels of Why" and I'm going to give credit to Sales Trainer Skip Miller for the idea for this technique. In one of Skip's seminars, he talks about using this technique to uncover the true business drivers behind a senior executive's actions. The idea is to keep asking the question "why?" until you really uncover the motivation for the executive's action or words. By probing further and asking questions, you learn more about your customer's business, including information that they have filtered out because they didn't think it was important or relevant. This analysis is key with Sugar because Sugar is so darned flexible that it's sometimes too easy to just go for it without thinking it through.

We're going to apply Skip's idea to our world to uncover the true drivers behind your users' modification requests. To understand how this all works, let's look in on a meeting between our customer and the developer who has been asked to make some changes to the software.

Customer: So, I need you to make the Account name field larger.
Developer: (thinking to himself: Uh oh, here we go again) Oh yeah? Why?
Customer: [somewhat snidely] Uh, because it's not big enough?
Developer: Well, alright then. When would you like this done?
Customer: It's urgent … so I need it right away.
Developer: (thinking to himself: oh man, this is a real doozy... this field shows up in a lot of places, plus in my custom reports; I wonder what's really up?) Can you tell me why you think the field's too small in the first place?
Customer: Well, I always put the account name in there, of course, but I put the state and country info in the title too and sometimes I have no room.
Developer: (thinking to himself: oh, that's why they've been complaining that the reports look too cluttered!) Can you tell me why you put the state and country along with the Account name?
Customer: Well, it's because we hired a new guy to help route the Accounts to the right sales reps, and he doesn't really understand how to search for information, so we decided to put the info he needs all on that field so he can see it all on one page.
Developer: Oh, I see. What if we changed the list view so that the state and country fields were displayed as well? Would that help?
Customer: Oh yeah! That would totally help!
Developer: (thinking to himself: well, that was easy. Now I can go out and play a round of golf!)

We started with one request and ended up with a different answer, plus we have also uncovered a training opportunity that might even negate the need for the customization altogether.

The take-home lesson here? Always ask WHY. Keep asking until you get to the real reason behind the request. You will gain more insight into your customer's business and will design a better solution in the end.

And that's your 60 second Sugar snippet. Goodbye!