WHERE VALUE LIVES

COMPANION RESOURCE

Customer Context Map Workbook

Supporting Chapter 8

A practical working workbook for understanding the customer's world before deciding where to invest strategic attention.

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Purpose and How to Use This Workbook

The Customer Context Map is a thinking tool. Its purpose is to help the Strategic Account Manager and the wider organisation understand the customer's world before deciding what to do.

Use this workbook to build and refresh an evidence-based view of what is shaping the customer's definition of value. The discipline is to move from internal ambition to customer context, from opportunity lists to value logic, and from assumptions to evidence.

- Before account planning: use it to structure research and expose knowledge gaps.
- During planning: use it to challenge assumptions and connect customer context to strategic choices.
- Before customer meetings: turn gaps and uncertainties into better questions.
- After customer meetings: capture what changed, what was confirmed and what remains uncertain.
- With cross-functional teams and executive sponsors: create one shared view of the customer's world.
- Refresh it whenever important stakeholders, priorities, pressures, risks or timing change.

The Ten-Part Customer Context Map

1. Market Pressures	**2. Strategic Priorities**
3. Stakeholder Landscape	**4. Operational Pressures**
5. Risk Factors	**6. Customer's Customers**
7. Alternatives and Substitutes	**8. Timing and Urgency**
9. Consequences of Inaction	**10. Evidence of Value**

Working rule: Do not complete boxes simply because they exist. Record what is known, identify what is assumed, and decide what must be learned next.

Customer Context Map - Working Snapshot

Use this page to create a concise account-level view before working through the detailed sections.

Dimension	What matters now?	Evidence / knowledge gap
1. Market Pressures		
2. Strategic Priorities		
3. Stakeholder Landscape		
4. Operational Pressures		
5. Risk Factors		
6. Customer's Customers		
7. Alternatives & Substitutes		
8. Timing & Urgency		
9. Consequences of Inaction		
10. Evidence of Value		

Account Context Summary

What has changed most?

What are we least certain about?

What should change in our account strategy?

Where is strategic attention justified - and where is it not?

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1. Market Pressures

What is happening in the customer's market?

Market pressures give value its shape. Competition, regulation, technology, economic conditions, customer expectations, supply chains, labour markets, environmental demands, political pressure, new entrants and industry consolidation can all change what the customer values.

Questions to Explore

- What is changing in the customer's market?
- Where is the customer being squeezed?
- Where are they trying to grow?
- Where are they trying not to fall behind?
- How is the market changing what they need from the relationship?

Working Record

Pressure / change	Evidence	Implication for customer	Implication for us
Competition / new entrants			
Regulation / compliance			
Technology / disruption			
Economic / cost pressure			
Customer expectations			
Supply chain / labour / environment			
Other			

2. Strategic Priorities

What is the customer trying to achieve?

The closer we get to the customer's real priorities, the closer we get to their definition of value. Declared priorities are not enough: test whether they are real, funded, measured, urgent and politically important.

Questions to Explore

- What priorities are declared?
- Which are funded?
- Which are measured?
- Which are urgent?
- Which are politically important?
- Which appear aspirational or decorative?
- What behaviour contradicts the stated priority?

Working Record

Priority	Evidence it is real	Funded / measured?	Urgency	Implication for value

3. Stakeholder Landscape

Who inside the customer shapes value?

A contact list tells us who we know. A stakeholder landscape shows how value, risk, influence and decision-making move through the customer's organisation.

Questions to Explore

- Who defines value?
- Who carries risk?
- Who controls budget or process?
- Who experiences the outcome?
- Who can support or block action?
- Where are we relying too heavily on one contact?

Working Record

Stakeholder / role	What they value	Risk they carry	Influence / decision power	Evidence / access
Economic / budget				
Users				
Technology				
Procurement				
Operations				
Compliance / risk				
Senior leadership				
Other				

A fuller standalone stakeholder diagnostic is planned separately; use this section to capture the context needed for the Customer Context Map.

4. Operational Pressures

What is difficult in the customer's day-to-day world?

Strategy matters, but daily operational reality has a powerful vote. Friction, rework, bottlenecks, reliability problems and poor handovers often define what value feels like in practice.

Questions to Explore

- What is hard to execute?
- Where is time being lost?
- Where is avoidable cost being carried?
- Where do processes or handovers fail?
- What reliability problems persist?
- Where does our own service create effort for the customer?

Working Record

Operational pressure	Who experiences it	Evidence / frequency	Impact	Potential relief / value
Manual work / rework				
Bottlenecks / handovers				
Data / systems				
Staffing / capacity				
Customer complaints / service				
Our own service friction				
Other				

5. Customer Risk Assessment

What risk is the customer trying to manage?

Risk shapes decisions. A decision that looks simple to the supplier may feel risky to the customer because the customer has to live with the consequences.

Questions to Explore

- What could go wrong from the customer's point of view?
- Who would be exposed or blamed?
- What previous failures shape current caution?
- What evidence would reduce perceived risk?
- What would make the customer feel safer?

Working Record

Risk category	Specific risk	Who carries it?	Likelihood / severity	Evidence or mitigation needed
Financial				
Operational				
Reputational				
Regulatory / compliance				
Cyber / data				
Implementation / change				
Political / career				
Supplier / continuity				
Customer experience				

6. Customer's Customers

Who is the customer trying to serve?

When we understand the customer's customer, we understand the pressure behind the pressure. This shifts the conversation from what we sell to what the customer is trying to deliver.

Questions to Explore

- Who are the customer's customers, users, citizens, patients, members or internal customers?
- What do they expect?
- How are those expectations changing?
- How does our work affect their experience?
- Can we help our customer serve them better?

Working Record

Customer's customer / group	What they expect	What is changing	How our customer responds	Potential relevance for us

7. Alternatives and Substitutes

What alternatives does the customer have?

Value is comparative. The customer judges an option against competitors, internal provision, automation, delay, reduced scope, changed process and doing nothing.

Questions to Explore

- What competing suppliers could be chosen?
- Could the customer build internally?
- Could they automate, simplify or reduce scope?
- Could they delay?
- Could they accept the problem?
- What is the perceived cost, risk and benefit of doing nothing?

Working Record

Alternative / substitute	Perceived benefit	Perceived cost	Perceived risk	Why customer may choose it
Competitor				
Internal provision				
Automation / process change				
Delay				
Reduced scope / simplification				
Do nothing				
Other				

8. Timing and Urgency

Why now?

Timing changes value. A useful improvement may not justify attention this quarter; a modest issue can become urgent when a deadline, competitor move, failure or leadership shift changes the context.

Questions to Explore

- What is driving urgency?
- What deadlines or budget windows matter?
- What dependencies must be resolved?
- What is delaying action?
- What must happen before the customer can move?
- What would make the issue more urgent - or less urgent?

Working Record

Trigger / dependency	Date / window	Effect on urgency	What must happen first	Implication for our action
Regulatory / contractual				
Budget / planning cycle				
System / operational event				
Competitor / market move				
Leadership priority				
Internal dependency				
Other				

9. Consequences of Inaction

What happens if the customer does nothing?

Consequences reveal whether the issue truly matters. If there is no meaningful consequence of inaction, the issue may not justify serious strategic attention.

Questions to Explore

- What gets worse if the customer does not act?
- What cost continues?
- What risk grows?
- What opportunity is lost?
- What customer experience remains poor?
- What strategic ambition becomes harder to achieve?

Working Record

Consequence category	What happens if nothing changes?	Who is affected?	Severity	When does it become material?
Financial				
Operational				
Customer				
Risk / compliance				
Competitive				
People				
Strategic				

A separate Cost of Inaction Diagnostic is planned as DEL-000004; this section keeps the essential consequence logic inside the workbook.

10. Evidence of Value

What evidence would the customer recognise?

Value evidence must be meaningful inside the customer's context. Different stakeholders may recognise different forms of evidence.

Questions to Explore

- What outcomes matter?
- How could they be measured?
- Who needs to believe the value?
- What evidence would Finance trust? Operations? Procurement? Users? Senior Leaders? Compliance?
- What evidence could a customer champion use internally?

Working Record

Stakeholder	Outcome they value	Evidence they would recognise	How / when captured	Recognition gap / action
Finance				
Operations				
Procurement				
Users				
Senior Leaders				
Compliance / Risk				
Other				

Knowledge Gaps and Evidence Plan

Consolidate the most important assumptions and evidence gaps identified across the ten dimensions.

Dimension	**Knowledge gap / assumption**	**Evidence needed**	**Source / question**	**Owner / timing**

From Context to Account Strategy

The map is useful only if it changes judgement and action. Use this synthesis page after completing the ten sections.

What has changed?

The three most important changes in the customer's world

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The evidence supporting each change

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What remains uncertain

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Where does value live now?

The outcomes the customer is most likely to value

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____

The stakeholders whose definition of value matters most

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____

The evidence they will recognise

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____

Where are we relevant?

Where our capabilities genuinely connect to customer context

Where we may be forcing relevance

Where mutual value appears strongest

Where should we invest attention?

What deserves senior or cross-functional attention

What can remain operational

What should we stop, defer or not pursue

Customer Dialogue Planner

Use the gaps in the map to prepare customer-centred questions. The aim is to test understanding, not to disguise a sales pitch as research.

- We are trying to understand what is changing in your world. What have we missed?
- Can we test our understanding of your priorities?
- Which pressures matter most from your perspective?
- How are your customers' expectations changing?
- What risks are making action harder?
- What would make this issue more urgent?
- What alternatives are you considering, including doing nothing?
- What would count as credible evidence of value for you?

Questions We Need to Ask

Question	Why we need to ask	Who should answer	What we learned

Refresh Review

Customer insight goes stale. Use this checklist periodically and after significant customer or market events.

Refresh test	Status / change	Action required
Stakeholders: Have roles, influence, sponsors, sceptics or decision power changed?		
Priorities: Have strategic priorities, funding, measures or urgency changed?		
Market: Have competition, regulation, technology or economic pressures changed?		
Operations: Have new friction points, failures, bottlenecks or service issues emerged?		
Risk: Has the customer's risk appetite or exposure changed?		
Customer's customers: Have their expectations or behaviours changed?		
Alternatives: Have new competitors, internal options or substitutes emerged?		
Timing: Have deadlines, budget windows or dependencies shifted?		
Consequences: Has the cost or risk of inaction increased or reduced?		
Evidence: Has new evidence of value been created, recognised or lost?		
Assumptions: Which statements in the account plan are now old insight rather than current knowledge?		
Action: What should change in the account strategy as a result?		

Next Review

Review date

Review owner

Final Outside-In Review

Before treating the workbook as complete, challenge the quality of the thinking.

Review question	Yes / No / Partial	Evidence / action
Does our account strategy begin with the customer's world rather than our sales target?		
Can we distinguish evidence from assumption?		
Do we understand the customer's real priorities rather than only the declared ones?		
Are we seeing the customer through more than one stakeholder?		
Do we understand the risks carried by customer stakeholders?		
Can we explain the pressure behind the pressure - including the customer's customers?		
Have we considered alternatives and doing nothing?		
Do we understand why the customer might act now - and why they might delay?		
Can we explain the consequences of inaction in customer language?		
Do we know what evidence of value different stakeholders would recognise?		
Have we identified where strategic attention is justified and where it would be wasted?		
Have we converted knowledge gaps into specific questions or actions?		

Companion to Chapter 8 of Where Value Lives - Second Edition. Designed as a live working tool: update it when the customer's world changes.