
WHERE VALUE LIVES

EXECUTIVE IMPLEMENTATION TOOL

Strategic Buying Conversation Planner

A practical worksheet for preparing customer-centred conversations across the real buying centre.

SUPPORTING CHAPTER 18

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How to Use This Planner

Use this worksheet with the account team before a strategically important customer conversation, buying-centre meeting or opportunity review. Its purpose is to improve the customer's decision quality - not to script manipulation or bypass formal process.

EXECUTIVE NOTE

The formal buying centre shows who is authorised to decide. The real buying centre shows how confidence, risk, influence and the internal decision story actually move.

A disciplined working method

- 1. **Frame** — Define the customer decision, desired outcome and current stage.
- 2. **Understand** — Identify what each function is trying to achieve and protect.
- 3. **Surface risk** — Make anxiety, implementation concerns and political consequences discussable.
- 4. **Prepare evidence** — Match proof to the stakeholder who must believe and carry it.
- 5. **Converse** — Plan a useful question and a useful next conversation - not a generic touch base.
- 6. **Refresh** — Update the planner as confidence, influence, evidence and context change.

Evidence discipline

Label	Meaning
DIRECT EVIDENCE	Observed statement, behaviour or decision.
REASONABLE INFERENCE	Several signals support the view, but it is unconfirmed.
ASSUMPTION	A belief that requires testing.
UNKNOWN	Information the team does not currently possess.

1. Decision and Confidence Snapshot

Customer / account
Strategic decision or change under consideration
Why this matters now
Desired customer outcome
Current decision stage
Formal process and timing
What would make the decision feel valuable?
What would make the decision feel safe?
Current confidence level: LOW / MEDIUM / HIGH
Evidence supporting that judgement
TEST Are we helping the customer make a better-supported decision, or merely trying to move our opportunity forward?

2. Real Buying Centre Inventory

Map roles by behaviour and decision contribution, not only by title. Record only what the team can support.

Function / stakeholder	Buying-centre role	Formal influence H/M/L	Informal influence H/M/L	Confidence / stance	Evidence status

Roles to test

Formal decision owner • Economic buyer • Technical or risk gatekeeper • User/value beneficiary • Internal champion • Sceptic or blocker • Informal influencer • Procurement/commercial controller • Executive context setter • Translator/internal storyteller

MISSING VOICE
Who needs to be involved earlier so that a legitimate concern does not become a late blocker?

3. Cross-Functional Buying Readiness

Start with functions commonly involved in a strategic decision. Replace or add roles to fit the customer's actual system.

Function / lens	Outcome sought	Protected interest	Perceived risk	Evidence or reassurance needed
Executive				
Finance				
Operations				
IT / Technical				
Risk / Legal / Compliance				
Procurement				
Users				
Other				

Readiness judgement

Where are priorities aligned?
Where is value contested?
Where could risk travel faster than value?
Which function is likely to be surprised if engaged too late?

4. Stakeholder Conversation Profiles

Complete one profile for each material function or stakeholder. Duplicate this page in the editable master when additional profiles are required.

Conversation profile 1

Function / stakeholder role	
Role in the real buying centre	
Outcome sought	
Protected interest - what must not be lost?	
Perceived risk or anxiety	
Customer-centred question to ask	
Evidence required	
Implementation concern	
Success measure	
Next useful conversation / owner / date	

4. Stakeholder Conversation Profiles — Continued

Conversation profile 2

Function / stakeholder role	
Role in the real buying centre	
Outcome sought	
Protected interest - what must not be lost?	
Perceived risk or anxiety	
Customer-centred question to ask	
Evidence required	
Implementation concern	
Success measure	
Next useful conversation / owner / date	

4. Stakeholder Conversation Profiles — Continued

Conversation profile 3

Function / stakeholder role	
Role in the real buying centre	
Outcome sought	
Protected interest - what must not be lost?	
Perceived risk or anxiety	
Customer-centred question to ask	
Evidence required	
Implementation concern	
Success measure	
Next useful conversation / owner / date	

5. Trust and Confidence Review

Trust is practical. When it is low, process, proof, control and defensive communication multiply. Assess confidence by dimension rather than using a single relationship score.

Trust / confidence dimension	Strong	Fragile	Evidence	Action required
Understands our world				
Tells inconvenient truths				
Stays present when things become difficult				
Cares about outcomes, not only invoices				
Helps stakeholders succeed internally				
Delivery capability is credible				
Risk is discussed honestly				
Value evidence can travel				

Trust judgement

Where is confidence strongest - and why?
Where could a small mistake become a verdict?
What must we earn before the customer is asked to commit?

6. Risk Travel Map

Risk often travels through comments, questions and raised eyebrows. Surface it, structure it and connect each concern to evidence or action.

Concern / risk	Who carries it?	Who amplifies it?	Current evidence	Useful response	Owner / date

CREDIBILITY STANDARD
Customers do not trust suppliers who pretend there is no risk. They trust suppliers who understand risk well enough to help manage it.

Risks we may be understating

Implementation or adoption risk
Integration, security, safety or compliance risk
Commercial or opportunity-cost risk
Reputational or political risk

7. Procurement and Commercial Connection

Procurement may control the commercial process without owning the complete value story. Connect commercial discipline to value without treating procurement as either the enemy or the whole customer.

Procurement success measures and pressures
How procurement defines fairness, value and risk
Value beyond line-item price that must remain visible
Evidence strong enough to survive commercial scrutiny
Comparability or benchmarking questions
Contractual protections the customer may legitimately require
Where the business and procurement currently see the decision differently
Conversation required to connect the two views
REMINDER Partnership is not a discount exemption certificate. Value must be measurable, comparable and defensible.

8. The Customer's Internal Decision Story

The customer needs an internal narrative that connects problem, priority, evidence, risk, choice and expected outcome. The supplier is not the hero; the customer's desired future is.

Why change is needed
Why the current approach is insufficient
Why this priority matters now
What must be protected
Who must be reassured
Evidence that must travel
Trade-offs the customer must accept
Why this approach / partner is credible
Expected outcome and how success will be recognised

Draft the decision narrative

NARRATIVE TEST Could a customer stakeholder explain this decision clearly, honestly and confidently in a room where we are not present?

9. Next Useful Conversations

Replace vague activity with conversations that increase shared understanding, surface risk, strengthen evidence or help the customer align internally.

Function / stakeholder	Purpose	Question to ask	Evidence to bring	Concern to surface	Owner	By when

Conversation quality check

- ☐ Is the question centred on the customer's decision rather than our offer?
- ☐ Will the conversation improve confidence, evidence, alignment or risk understanding?
- ☐ Are we willing to hear an answer that weakens our opportunity?
- ☐ Does the customer remain fully free to choose?

10. Leadership Summary and 90-Day Actions

How the decision is really forming
Where trust is strong
Where confidence is fragile
Most influential untested assumption
Most important missing or late-engaged voice
Risk most likely to travel
Evidence that must become portable
Leadership decision or support required

90-day action plan

Action	Stakeholder outcome	Owner	By when	Evidence of progress	Status
FINAL ETHICAL TEST Will the customer be better informed, more aligned and more confident because we were involved? Influence clarifies what matters. Manipulation hides or exploits it.					