WHERE VALUE LIVES

VALUE RECOGNITION WORKSHEET

One-Customer Value Recognition Review

A practical review of customer context, stakeholder recognition, evidence, trust, organisational attention and the next useful action.

SUPPORTING CHAPTER 25

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How to Use This Review

Start with one customer. Complete the review with a small cross-functional team, then test the important conclusions with relevant customer stakeholders. The purpose is not to admire the relationship or complete another template. It is to understand what the customer recognises as valuable now and decide what useful action should happen next.

CORE PRINCIPLE
The five inches between the customer's ears is the only place where quality and value exist.

Review discipline

USE ONE CUSTOMER — Keep the review grounded in a real relationship.

SEPARATE BELIEF FROM RECOGNITION — Record what the supplier believes, then identify what the customer has actually recognised.

USE CURRENT CONTEXT — Value changes when the customer's world changes.

LOOK ACROSS MINDS — Different stakeholders recognise different outcomes, evidence and risks.

END WITH ACTION — A review is useful only when it changes attention, behaviour or a decision.

Evidence labels

DIRECT EVIDENCE	Observed data, customer words, behaviour or decision.
REASONABLE INFERENCE	Several signals support the view, but confirmation is needed.
ASSUMPTION	A supplier belief that must be tested.
UNKNOWN	A material gap that remains open.

One-Customer Review Overview

Customer / account
Review date and participants
Why this relationship matters to us
Why it may matter to the customer
Current strategic intent
Current investment choice: Protect / Grow / Incubate / Repair / Maintain / Exit or simplify

The seven questions

1. What is changing in the customer's world?	Current judgement:	Evidence label:
2. What does the customer value now?	Current judgement:	Evidence label:
3. Which stakeholders recognise the value?	Current judgement:	Evidence label:
4. What evidence exists and can travel internally?	Current judgement:	Evidence label:
5. Where is trust strong or weak?	Current judgement:	Evidence label:
6. Is current organisational attention justified?	Current judgement:	Evidence label:
7. What useful action should happen next?	Current judgement:	Evidence label:

CENTRAL TEST
What does this customer recognise as valuable now—not yesterday, not in our proposal and not merely in our own opinion?

1. What Is Changing in the Customer's World?

Context creates the meaning of value. Begin outside-in: priorities, pressure, change, risk and the customer's own customers. Do not begin with what the supplier wants to sell.

CONTEXT TEST
Can we explain why this relationship and its current issues matter now without mentioning our product?

Context change / signal	Why it matters now	Evidence / source	Likely implication

Interpretation

What has changed since our last review?
Where is value being created, lost, delayed or trapped?
Which assumptions about context need customer confirmation?
What does this context make newly valuable—or less valuable?

2. What Does the Customer Value Now?

The supplier’s offer may be unchanged while the customer’s definition of value has moved. Describe outcomes in the customer’s world, using customer language wherever possible.

RECOGNITION TEST
What outcome, improvement, confidence or reduced risk does the customer currently care enough to recognise?

Value outcome	Beneficiary	Why it matters now	Customer language / evidence	Confidence

Supplier belief versus customer recognition

What we believe we provide	What the customer appears to experience	Gap / contradiction	How to test

REMEMBER
Purchase is evidence of a decision. Activity is evidence of effort. Neither automatically proves deep value recognition.

3. Which Stakeholders Recognise the Value?

The customer is a system of minds. Users, economic buyers, procurement, sponsors, champions, sceptics and gatekeepers may recognise different forms of value and evidence.

Stakeholder / role	Value they recognise	Evidence / words used	Value they do not recognise	Influence on future

Recognition gaps

Whose recognition matters most now?
Who must defend or carry the value story when we are not in the room?
Who remains unconvinced, and what risk or outcome are they protecting?
Which stakeholder conversation should happen next?
ETHICAL STANDARD Stakeholder understanding should help the customer make a better decision—not manipulate them into our preferred answer.

4. What Evidence Exists and Can Travel Internally?

Value that is not recognised is vulnerable. Useful evidence can travel through business cases, executive reviews, procurement discussions, budget decisions, renewals and future opportunities.

Outcome / value claim	Evidence available	Source / owner	Who accepts it?	Can it travel?	Gap / next proof

Internal travel test

How would the customer describe this value in their own language?

Can the champion use the evidence without us in the room?

Does procurement understand it?

Does the economic buyer believe it?

Do users feel the difference?

What evidence must be gathered before renewal—not during a renewal panic?

EVIDENCE STANDARD
Do not claim more than the evidence supports. Honest limits strengthen credibility.

5. Where Is Trust Strong or Weak?

Trust is the carrier signal of strategic relationships. It determines how claims, mistakes, risks, proposals and innovation ideas are interpreted.

Relationship / stakeholder	Trust signal	Strength H/M/L	Evidence / example	Risk or opportunity	Next behaviour

Trust behaviours

Doing what we said we would do	Evidence:	Next improvement:
Telling the truth early	Evidence:	Next improvement:
Discussing risk honestly	Evidence:	Next improvement:
Not overclaiming	Evidence:	Next improvement:
Respecting internal politics	Evidence:	Next improvement:
Following through	Evidence:	Next improvement:
Admitting and repairing mistakes	Evidence:	Next improvement:
Creating recognised value	Evidence:	Next improvement:

TRUST TEST
Can hard questions be asked without the relationship collapsing under them?

6. Is Current Organisational Attention Justified?

Service quality should be universal; organisational attention should be selective. Test whether scarce senior time, innovation capacity and cross-functional energy are matched by mutual future value and customer engagement.

ATTENTION TEST
Does this relationship matter to both sides enough to justify the attention being invested?

Attention / resource	Current level	Customer-side mutuality	Value / evidence created	Continue / change

Investment judgement

What attention is essential to service quality?
What additional strategic attention are we investing?
Which attention creates value, and which creates noise?
What should we increase, protect, redirect or stop?
Current choice and evidence: Protect / Grow / Incubate / Repair / Maintain / Exit or simplify
CHOICE An important customer matters to us. A strategic relationship matters to both sides.

7. What Useful Action Should Happen Next?

End with a specific action that improves understanding, recognition, trust, mutual value or the quality of attention. Do it usefully, then learn and repeat.

Possible action directions

CONTEXT	Test a material change or assumption with the customer.	Our action:
RECOGNITION	Hold a conversation with a stakeholder whose view is missing.	Our action:
EVIDENCE	Gather, frame or validate evidence the customer can use.	Our action:
TRUST	Repair a gap through honesty, follow-through or risk discussion.	Our action:
ATTENTION	Increase, protect, redirect or stop organisational attention.	Our action:
CO-CREATION	Explore value before commitment or proposal.	Our action:
GOVERNANCE	Make a decision, remove a barrier or establish a useful rhythm.	Our action:

Mutual action plan

Action	Customer outcome	Customer contribution	Supplier contribution	Owner	By when	Evidence

USEFULNESS TEST
Will this action make the relationship more valuable, understandable or defensible in the customer's world?

One-Page Value Recognition Summary

Customer and current strategic intent
What is changing in the customer's world?
What does the customer value now?
Strongest recognised value and who recognises it
Most important recognition gap
Evidence that can travel internally
Trust strength and most important weakness
Current attention judgement and investment choice
Next useful mutual action
Review date and evidence expected

Overall recognition judgement

Dimension	1 - weak	2	3	4	5 - strong	Evidence / comment
Customer context						
Stakeholder recognition						
Evidence strength						
Trust						
Attention / mutuality						
Next-action clarity						

FINAL STANDARD
Strategic Account Management is not complete when value is delivered. It is complete when value is recognised.

Customer Conversation Guide

Use selected questions in a genuine conversation. Do not turn the review into an interrogation or ask the customer to validate a conclusion you have already decided.

What is changing in your world that we need to understand better?	Customer response / evidence:
What matters more—or less—to you now than it did six months ago?	Customer response / evidence:
Where has our work made a useful difference?	Customer response / evidence:
Who else experiences or judges that value differently?	Customer response / evidence:
What evidence would help you explain or defend the value internally?	Customer response / evidence:
Where are we making the relationship easier, and where are we adding friction?	Customer response / evidence:
How confident are you that we will do what we say?	Customer response / evidence:
Where would additional attention from us be genuinely useful?	Customer response / evidence:
What should we stop doing because it creates activity rather than value?	Customer response / evidence:
What is the most useful thing we could do next?	Customer response / evidence:

LISTEN FOR

The customer may not use SAM language. Listen for better understanding, better questions, useful people, honest risk discussion, follow-through, internal defensibility and help before a proposal.

90-Day Value Recognition Actions

Turn the review into a short discipline of testing, evidence and useful customer conversations. Update the Living Account Plan and Value Evidence Log rather than creating parallel records.

Action	Recognition outcome	Stakeholders	Owner	By when	Evidence / status

30 / 60 / 90-day checks

DAY 30 — What have we tested? Which supplier beliefs changed?

DAY 60 — Which stakeholders recognise value more clearly? What evidence can now travel?

DAY 90 — What changed in customer perception, trust, decision or mutual commitment?

Learning to carry into the Living Account Plan
Evidence to add to the Value Evidence Log
Attention to protect, redirect or stop
Next review date and participants

CLOSING THOUGHT
Start with one customer. Do it usefully. Then do it again—with better discipline each time.