



Business Review Tips

Quick reference to use behavioral insight to help you, as a customer success manager, have effective business reviews

Behavior Insight	Explanation	How we apply this in executive business reviews
Messenger	We are heavily influenced by who communicates information	<ul style="list-style-type: none">• Encourage executive buyer to establish resources• Engage executive to communicate priorities
Incentives	Our responses to incentives are shaped by mental shortcuts	<ul style="list-style-type: none">• Ensure people involved avoid losses (in reputation, time etc)
Norms	We are strongly influenced by what others do	<ul style="list-style-type: none">• Share customer stories• Share what peers are doing within the company• Suggest opportunities to connect with others in the industry
Defaults	We go with the flow of pre-set options	<ul style="list-style-type: none">• Establish expectation of executive engagement• Supply suggested action plans
Salience	Our attention is drawn to what is novel and seems relevant to us	<ul style="list-style-type: none">• Share highlights based on data in platform• Draw connections for the client to show relevance
Priming	Our acts are often influenced by unconscious cues	<ul style="list-style-type: none">• Use words that assume success and engagement• Demonstrate a sense of urgency, speak with a sense of urgency
Affect	Our emotional associations can powerfully shape our actions	<ul style="list-style-type: none">• Express positive emotions with clients, share stories that evoke positive emotions
Commitments	We seek to be consistent with our public promises	<ul style="list-style-type: none">• Encourage client to commit to action in front of peers• Provide opportunities for clients to share stories and future plans with others (ie community conference)
Ego	We act in ways that make us feel better about ourselves	<ul style="list-style-type: none">• Share benchmarking numbers that help people feel better about their programs• Find the positive in client programs and comment

Behavior Insight and explanation from Mindspace at <https://www.instituteforgovernment.org.uk/sites/default/files/publications/MINDSPACE.pdf>

How to apply by www.yoursuccesspartnernow.com

