Getting Started: Why Invest Time in This Discovery?

You're the technology folks who focus on the tools and support your clients need to operate effectively and securely every day. But your client's level of understanding isn't the same as yours. In today's world, business leaders have a responsibility to become more tech savvy.

They need to make sound decisions based on the role that technology plays in their business. Not every leader has the same interest and willingness to grow their technology knowledge. They might be intimidated. Maybe they still have the "IT does that" mindset. Or they're eager to learn.

The first thing to do is to understand where your client lands on the learning interest scale. With this information, you'll be able to guide them in the strategic business technology planning process that works best for them.

Tips for Having the Conversation You and Your Clients Will Appreciate

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Client: _____ **Date:** ____/____/_____

Learning Readiness Scale

1: Staying As Is	2: Hint of Possibility	3: Reasonably Interested	4: Openly Curious	5: Eager to Learn

	Start By Discovering Their Interest Level	1	2	3	4	5
1.	How interested are you in learning more about the technology that supports your business now? • **Listen for**: Enthusiasm, curiosity, and a desire to understand the role of technology. • **Learning readiness indicators:** Actively engaged. Asks follow-up questions.					
2.	On a scale of 1-10, how comfortable are you with learning new technology-related skills? • **Listen for**: Self-assessment of their comfort level and willingness to learn. What concerns and obstacles do they mention? • **Learning readiness indicators:** A rating of 6 or above indicates the openness to exploring new skills.					
3.	What are the specific goals or immediate pain points that additional technology knowledge would address? • **Listen for:** Specific, actionable goals and how clear their understanding of knowledge can help. • **Learning readiness indicators:** Clearly describe the measurable benefits of improved knowledge.					
4.	How much time can you dedicate to learning about technology and its specific impacts on your business?					

	Start By Discovering Their Interest Level	1	2	3	4	5
	• **Listen for:** Realistic understanding that learning is a time investment. • **Learning readiness indicators:** Are they willing to assume responsibility for acquiring to achieve goals.					
5.	What systems or programs do you currently have in place to continuously learn and stay up to date with relevant business technology? • **Listen for:** Existing discipline and habits to support consistent learning. • **Learning readiness indicators:** The more focused and committed their existing learning is the more open they are to new knowledge sharing from you.					
6.	How do you typically prefer to learn new skills or concepts (e.g. reading, videos, listening, hands-on workshops, webinars? • **Listen for:** Their preferences will guide your delivery of content to them. • **Learning readiness indicators:** Specific formats indicate they have a consistent approach to learning.					
7.	What educational programs or training have you or your team participated in over the past year? What was the outcome?					

	Start By Discovering Their Interest Level	1	2	3	4	5
	• **Listen for:** Prior experience with learning and the perceived results will help shape your knowledge-sharing delivery. • **Learning readiness indicators:** Positive or negative outcomes can both influence how ready they are to continue learning.					
8.	On a scale of 1-10, how would you rate your overall level of technology proficiency and comfort level? • **Listen for:** Self-assessments aren't always realistic. Are they underestimating their knowledge level? Are they overly confident? • **Learning readiness indicators:** If they're a 5 or above, they're open to adding to their knowledge. That doesn't mean less than 5 should be abandoned. Your approach will just be different.					
9.	What are the biggest obstacles or roadblocks you anticipate in broadening your technology knowledge? • **Listen for:** Specific obstacles that you can address in your content, delivery, and degree of one-on-one engagement with them. • **Learning readiness indicators:** Acknowledge there will be challenges and their willingness to overcome them.					
10	How open are you to receiving regular updates, tips, insights, and resources from us to broaden your technology knowledge?					

Start By Discovering Their Interest Level	1	2	3	4	5
• **Listen for:** Eager to continually learn from you. They see you as a trusted source for relevant information. • **Learning readiness indicators:** How frequently do they want to hear from you? Will they use the information you give them?					
11. What concerns or hesitations do you have about expanding your technology knowledge? • **Listen for:** Specific concerns that you can address through delivery, content, preparation, etc.. • **Learning readiness indicators:** Expressing concerns clearly and willingness to find a solution so they can learn.					
12. How do you currently measure the success or impact of your technology investments and initiatives? • **Listen for:** Specific metrics and use of data to drive decision-making and strategic direction. • **Learning readiness indicators:** Use of data and knowledge to assess outcomes indicate a higher level of interest in continued learning.					
13. What are your thoughts on expanding your team's technology knowledge and interest in learning? • **Listen for:** Commitment to the entire company's knowledge growth for strategic benefits.					

	Start By Discovering Their Interest Level	1	2	3	4	5
	• **Learning readiness indicators:** Specific ideas for including the team in your knowledge sharing program..					
14.	On a scale of 1-10, how receptive would you be to regular reviews with us to ensure we're delivering the most useful, effective knowledge? • **Listen for:** Awareness of collaboration and your willingness to be accountable for quality content. • **Learning readiness indicators:** The higher the number the more open to regular collaboration. Don't abandon the low ratings. This is where the opportunities to show unexpected value in learning will be found.					
15.	How might your decision-making and business processes change with a deeper knowledge of technology and its role in your business? • **Listen for:** Specific thoughts on the relationship between increased knowledge and greater strategic alignment.. • **Learning readiness indicators:** Openness to exploring business impacts and potential.					

Putting It All Together

The key indicators of learning readiness you should look for include:

- Enthusiasm, curiosity, and a desire to learn

- Commitment of time and resources to the learning process

- Openness to different learning formats and styles

- Positive past experiences with technology learning

- Acknowledgment of challenges and a willingness to address them

- Eagerness to engage with ongoing learning opportunities

- Articulation of clear benefits and a desire to achieve them

- Openness to ongoing collaboration and accountability

How to Identify Your Client's Attitude Toward Learning

After you've completed this discovery conversation with your client, think about the unspoken messages you received. What your client didn't say is often as useful as their actual words. Here is a simple breakdown of the 5 levels of learning readiness to help guide your knowledge sharing program. We'll dive into designing your program next.

1: Staying As Is	2: Hint of Possibility	3: Reasonably Interested	4: Openly Curious	5: Eager to Learn

1 – Staying As Is

- Disinterest or indifference towards learning how technology serves their business goals

- Reluctance to commit time or resources to the learning process

- Lack of awareness or understanding of the potential benefits

- Negative past experiences with technology learning

- Concerns or doubts about their ability to learn and implement

- Unwillingness to engage with ongoing learning opportunities

- No clear goals or pain points that could be addressed through learning

- Overreliance on IT people to be the knowledge experts

Example phrases and attitudes:

- "I don't really have the time or patience for that."
- "Technology is too complicated for me to understand."
- "I'm not sure how this would benefit my business."
- "We're fine the way we are."
- "Our IT people take care of everything, so I don't have to worry about it."

2 – Hint of Possibility

- Some interest in learning, but it's not a strong priority

- Reluctant to commit substantial time or resources

- Some recognition of potential benefits, but not fully convinced yet

- Neutral or mixed past experiences with technology learning

- Concerns about the challenges or difficulties of learning

- Openness to learning, but limited engagement

- General goals aren't aligned with technology

Example phrases and attitudes:

- "I'm not sure yet."
- "I'd be willing to try, but I don't want to spend too much time or money on it." "
- I can see how this might be useful, but I have other priorities right now."
- I'll think about it for a later time."

3 – Reasonably Interested

- Genuine interest in learning, but there are higher priorities

- Willing to allocate some time and resources to the learning process

- Agrees there are potential benefits and is curious to explore the idea

- Positive but inconsistent past experiences with technology learning

- Some concerns about what the learning process involves, but open to working through them

- Engaged in the conversation and asks thoughtful, relevant questions

- Describes goals or immediate needs that could be met through expanded knowledge

Example phrases and attitudes:

- "This sounds interesting so let's explore it further."
- "I can see how this could help us, but I'd need to understand more about the time and money commitments."
- "I've had some success with technology learning in the past, so I'm interested in doing more like this."
- "We're open to your suggestions."

4 – Openly Curious

- Strong interest and enthusiasm towards learning how technology aligns with strategy

- Committed to allocating significant time and resources to consistent learning

- Clearly recognizes the potential benefits of deeper knowledge and is eager to achieve them

- Positive past experiences with technology learning and a desire to continue

- Minimal concerns or doubts, and confidence in their ability to address any obstacles or shortcoming

- Actively engaged in the conversation and asks informed questions

- Clearly defined goals or needs that can be directly addressed through greater knowledge

Example phrases and attitudes:

- "This is exactly the kind of thing I've been looking for to help my business grow."
- "I'm really excited about the prospect of learning more and applying this knowledge to our strategic initiatives."
- "I'm confident that by improving our technology knowledge, we will realize significant results for our company."

5 – Eager to Learn

- Passionate and enthusiastic about continuously expanding knowledge

- Fully committed to dedicating time, resources, and energy to the learning process throughout the company

- Clearly understands the strategic value of technology knowledge and skills

- Consistently positive past experiences with technology learning and a desire to continue

- Realizes that challenges can be unseen opportunities and is proactive about addressing them

- Highly engaged, asks insightful questions, and seeks to collaborate actively

- Clearly defined, ambitious goals that are directly linked to technology knowledge as a valuable asset

Example phrases and attitudes:

- "This is an absolute priority for me and my business. I'm eager to dive in and get started."
- "I know that technology is a critical driver of our success, and I'm committed to continuously improving our knowledge and capabilities."
- "I'm excited to work closely with you to develop a comprehensive knowledge-sharing program"
- "I'm confident that technology knowledge growth will transform the way we operate and give us a competitive edge."