

This week saw Gainsight's annual Pulse Everywhere Conference take place. This year broadcasting virtually August Hall, San Francisco. The conference is usually a physical 3 days event but due to the Covid-19 pandemic, the event was digital. With the exception of a small audience at August Hall where the keynote speeches were broadcast live from.

Pulse Everywhere is one of my favorite conferences. Not only because its content is awesome, but because every speaker is always so passionate about Customer Success. The energy at their physical conferences is electric, and none of that energy was lost by the switch to a virtual conference.

Key Takeaway — Improve time to value through workshops

This year, like every other, Pulse EveryWhere was filled with awesome learnings from some very inspirational speakers. I have taken many learnings and concepts away from the conference. However, each year, in true North Star form, I try to take one key learning and put it into action.

This year's Key Takeaway for me was the concept of 'Improve time to value through workshops'.

A large part of client onboarding typically involves the client providing information of some variety. This might be current data, configurations, graphics, list of users, parameters, and so on. Although you get some of those 'Golden Clients' that provide everything really efficiently, more often than not you will struggle to get the information you need from the client within your ideal timeline.

In today's world, everyone is busy, priorities change at the drop of the hat. Although that client might have promised you that user list by the end of the day, a few new emails drop and the client's attention has moved on.

Book a joint workshop to get the information you need

Instead of continually chasing your client for the required information, suggest you book in a 'Workshop' where you can gather the information with the client. Ensure you set your customer expectations on the 'Workshop' from the outset. The last thing you want is to get on that call and the client isn't expecting to do anything other than chat.

“Let’s book a 2-hour workshop where we can work together to gather the right information together. It would be great if you could gather what you can before the workshop. That way we can hit the ground running. If you need others to be involved in gathering this information, please can you also invite them to the workshop.”

Having a Workshop means the client gets your attention for a couple of hours to help focus them on gathering the right information. It removes a lot of back and fore communications and gives you a much clearer timeline on getting the information from the customer to deliver that first wow.

You can even book a follow-up session at the end of the workshop. Showing your client how the information they have provided has been used to deliver their new service/product. By seeing how they have directly contributed to the product/service you deliver will also increase their buy-in as a customer.

Thank you for reading. If you get the time, please take a look at my [Blog](#).

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