

Strategic Conversations Template AI Prompt

CONVERSATION PROMPT

Instructions:

1. Upload the transcript from the *Crucial Conversations Primer* on the right side of the Claude screen under product knowledge.
2. Overwrite the content in green italics with your own specifics.
3. Use the pink highlighted notes to inform the content
4. Omit names and other identifiers. Do not share anything confidential that your company would not want in the public domain.
5. Copy from ** to ** and paste into Claude on the left side where it says “How can Claude help you today”
6. See example outputs for reference

****You are the high level executive communications support person for business leaders in a *small business financial services business unit retail part of a very prestigious bank.* Use the following framework which we will call the Crucial Conversations framework to a construct possible conversation in script form between me and my stakeholder.**

With respect to the tone it should be in a business tone, collegial, and intending to find common ground. These will be constants in all of the conversations that we construct.

Refer to the conversation framework I have already uploaded to the project knowledge area.

About Our Business: The business unit I work for supports [clients] to [generate desired outcome], and [this is how we win in the marketplace.] *small business owners with less than \$1,000,000 in revenue. They are diverse set of clients. The intention is to increase market share and wallet share. We are in the business of supporting small business owners with very specific solutions that make sense for the style of business operations that they're running, their lifestyle, what's most important to them, etc., and because we have compiled all the different products and functions and tailored them for the needs of small business owners we are winning in the marketplace.*

About My Function: *I am responsible for Diversity and Inclusion, and my intention is to produce a cultural shift in the way we work together that ensures that leaders treat employees in a way that is respectful and inclusive, such that they give the best of their talents to having the business win. We want to recruit and retain the best and brightest talent from a variety of backgrounds races ethnicities and genders and sexual orientations to create a team that operates seamlessly together, a high performing team that provides the continuity and innovation to win in the marketplace and the sensitivity*

to the diverse clients understanding their needs aspirations concerns challenges and desired solutions.

About the Stakeholder I am speaking with: *this person is head of sales. He is a white Italian male. Doesn't care too much about Diversity. Doesn't like me very much -- not a fan of diversity or me. Doesn't understand the mission or how diversity fits into his world. Feels like it's oppressing him and making his life more challenging. He is annoyed by it. I want to see if we can't work together to align our visions. I haven't been able to articulate the overlap between what he cares and what I care about sufficiently, and I'm looking to engage him as an informal adviser to make sure that my agenda is aligned with his agenda.*

About the System Step we're implementing: *This conversation is about requesting that this person be my informal advisor, so that I can run situations past him and he will give me his insight based on his understanding of the understanding of how the business works and what's the best way to proceed forward with a given situation.*

Desired Outcome of the Conversation: *Having a savvy advisor that agrees to candidly support me in navigating the system, understanding how to progress in context of the nuances of the key business imperatives and outcomes, cultural norms, characteristics of those perceived as top talent, relationship dynamics between leaders and functions internally in this business unit, within the broader organization and externally, desired leadership and communication style – sequencing conversations, connecting the impact of my output to what's important to key business leaders, and finding common ground between what's important to them and what I'm doing.***

CLAUDE'S RESPONSE

I'll help construct a conversation using the Crucial Conversations framework from the transcript, considering the specific business context and stakeholder dynamics you've described.

Here's a potential conversation script:

ME: "John, thank you for making time to meet. I'd like to have a candid conversation about how we might work together more effectively to drive business results. I value your experience and perspective on what makes this business successful."

STAKEHOLDER: "Sure, what's on your mind?"

ME: "I have a request I'd like to run by you. I'd appreciate the opportunity to periodically get your insights on how to best position and implement initiatives in ways that directly support our sales and revenue goals. Would you be open to serving as an informal advisor?"

STAKEHOLDER: "What exactly would that involve?"

ME: "I recognize that you have deep knowledge of what drives success in our small business segment. My reasoning is that by better understanding your perspective on business priorities and customer needs, I can ensure my work directly contributes to growing market share and wallet share with our diverse client base. For example, I'd like to learn more about what you're seeing in terms of what different types of business owners need from us to succeed."

STAKEHOLDER: "I'm focused on hitting our numbers and growing the business. How would this help with that?"

ME: "I'm curious to hear your view on this - what do you see as the key factors that help us win and retain small business clients? What are the biggest challenges your teams face in growing those relationships?"

STAKEHOLDER: "Well, it comes down to understanding their business model and offering solutions that help them operate more efficiently and profitably. My teams need to build trust and demonstrate we get their specific needs."

ME: "I see some real common ground there. You're focused on understanding diverse business needs to provide tailored solutions. I believe we could partner to help your teams build even stronger connections with different types of business owners by combining your product expertise with insights on effectively serving various customer segments. What are your thoughts on exploring that kind of collaboration?"

STAKEHOLDER: "That could be interesting if it's practical and focused on driving results."

ME: "I appreciate your openness. Could we agree to meet quarterly for 30 minutes where I could run specific ideas by you to pressure test them against sales priorities and get your guidance on effective implementation? I'm happy to come prepared with focused topics that respect your time."

STAKEHOLDER: "Alright, let's give it a try. Have your assistant set something up."

ME: "Thank you, I really value your willingness to share your expertise. I look forward to learning from your perspective on how we can best support the business goals."

The script demonstrates:

- Opening with collaboration frame
- Clear, specific request
- Reasoning tied to business results
- Active listening to understand their perspective
- Finding common ground in serving clients effectively
- Concrete next steps
- Appreciation while maintaining professional tone

CopyRetry

CD

Good. Can you refine to ask how I can make the culture initiatives in the business that I run more helpful to him regarding his employees- attracting developing and retaining the best and brightest to serve his sales goals

Edit

I'll refine the conversation to focus specifically on aligning culture initiatives with his talent and sales objectives.

Here's the refined conversation:

ME: "John, thank you for making time. I'd like to explore how we might align our culture initiatives to better support your sales goals and team performance. I know talent retention and development are crucial for sustaining our market leadership."

STAKEHOLDER: "What specifically did you want to discuss?"

ME: "I have a request. I'd value your insights on how we can make our culture initiatives more practical and impactful for your sales organization. Would you be open to serving as an informal advisor to help shape these programs to better serve your talent needs?"

STAKEHOLDER: "What exactly are you looking to understand?"

ME: "You've built a high-performing sales organization that's winning in the marketplace. My reasoning for seeking your guidance is that I want to ensure our culture work directly supports attracting and retaining the kind of talent that drives those results. I'd like to understand what you see as the key characteristics and behaviors that make your top performers successful."

STAKEHOLDER: "My focus is on having people who can build relationships with business owners and understand their needs. I need team members who can consistently deliver results."

ME: "I'm curious - what are your biggest challenges in finding and keeping those high performers? What do you see as the factors that cause your best people to stay or leave?"

STAKEHOLDER: "It's competitive out there. The best performers have options. They stay when they feel they can grow their business, develop their careers, and be rewarded for results. They leave when they feel blocked or don't see a path forward."

ME: "I see important common ground here. You need to attract and retain results-oriented relationship builders who can grow with the business. I believe we could partner to create an environment that makes your team the destination of choice for top talent. For example, how could our development programs better support the skills and experiences your team needs to succeed?"

STAKEHOLDER: "If you could help my people grow their careers while delivering results, that would be valuable."

ME: "Would you be open to meeting quarterly where I could get your input on specific initiatives - making sure they're practical and focused on helping your team succeed? I'd come prepared with concrete ideas for your feedback."

STAKEHOLDER: "As long as it's focused on real business impact, I'm willing to try it."

ME: "Thank you, I really appreciate your willingness to help shape these efforts. Your perspective will be invaluable in ensuring we're truly supporting your team's success. What's the best way to get time on your calendar?"

This refined version:

- Centers on his talent needs and business results
- Positions culture work as a tool for sales success
- Seeks to understand what drives top performer retention
- Finds common ground in developing and keeping key talent
- Maintains focus on practical business impact
- Sets up ongoing dialogue focused on his priorities

EMAIL PROMPT (This is from GEORGE BRYANT'S FREE CUSTOMER JOURNEY WEBINAR)

*** You are the high level executive communications support person for business leaders. Use the APPE format and the conversation detail we just worked on to write an email inviting this colleague to a meeting to discuss the matter we just planned.*

*APPE format:

Acknowledge - 1st step is to acknowledge your customers.

Acknowledge – you're in the right place you've made the right decision and I've got you. We see them, we hear them, we respect and love them. They understand that we're in their corner.

What was the last interaction you had and something they shared about where they were at? – you can use to anchor in the previous conversation

Hey Jane thanks for being patient with me and DMing me for customer journey

Believe it adds value. You're in the right place. Here's the right thing

Hey man, Kudos this tells me a lot about you as an entrepreneur because you of the millions of people that heard that you're literally one of xx that DM'd me

And so I know you're going to win and I'm just excited to have you in my ecosystem.

Hey {first name},

You did it. Welcome to (insert business)

I am so excited for you to be on this path of (insert your client's journey). It's an honor and privilege to be your guide and take you on this wonderful journey of (x) to get to (y)

One thing that is very important to me is that I do everything I can to empower you to deepen your relationship with yourself so you can achieve (after state) and this first email is a critical piece of that.

THAT'S why (company name) exists as a business. And it's very important for me to deliver the results you desire.

Get ready to experience x, y, z

#2 Prepare-

- Set context and containers to support them
- Hey, I'm going to make sure you win, tell you what it looks like, and how simple it will be for you
- **Prepare**

- Share with them the intention of your message is to follow up on our call and I'm really excited
- I'm so stoked to send this – I wanted to wait because What I'm sending is a 5 part video series with google doc- 8 steps – you're going to want to watch it all
- Here's the videos – you can do it as fast as you want but it takes most people two days
- And here's the training I talked about. It's a 46 minute training
- And for context it was
- in my mastermind but it will make sense to you but please don't share it with anyone

#3 Project-

- 3rd Step Here is how this will benefit you, acknowledge the buyer's remorse
- Give specific examples of simple solutions to their pain points
- Use stories to take them on the journey

Share what you see in your collaboration that benefits them. What are they going to achieve? What's their after state What's their next step

and if you do it to completion and do the work it makes me and you working together so easy you're going to be bananas when you implement it its going to give both you and me more clarity. You're going to be able to do this on repeat to your DMs

Do it bite bite bite, implement it as you see it, and it will make this easier, this easier and this easier

When you're done watching it, you'll be able to do this and this, I'm pretty sure.

#4 Prehandle- Everything that is going to get in the way of the result

- Objections
- People use objections because they are scared of the unknown
- Protect consistency within your journey
- Do not create objections that aren't real
- Objections usually happen because they are uneducated.
- If there was a specific objection as to why they were on the fence remind them of how you addressed it
- Oh yeah there's 8 videos, Btw, there's question in each video, and you need to answer each of them, and it will only work if your write them down and start to put them in the document. If you DM with questions I'll answer them but if you didn't do the homework I cant
- Oh and yes you do have to watch all the videos for it to make sense

“It’s only a problem in the customer journey if left untalked about.”
“ If ambiguity exists, it's a guaranteed pain point.”

#5 Excitement (celebrate the fact they are going)

Excite

Share your excitement for what’s coming. Hey now we’re prepped so now we can go

So here’s the link to the video – you have everything you need. So watch it and if it works and if it lands, probably best to come to my event. But if not let me know how I can help you

Now that you have everything you need, you’re ready to go.

And if you want next steps, we’d love to have you at our event, your energy is great, and it will help you apply this this and this. Or if I can answer any questions let me know

if you need anything, Let me know but now you have everything you need

so go watch it. And if you want me to help you apply this personally we can schedule a consult or you can come to the event

- Most important phase because its right before they go
- We are just saying 3, 2, 1, and go
- If they complete the process and duration, they will have a 90% chance of getting the results.

The customer journey is designed to create ever-lasting success in your business.

Most entrepreneurs take a few bits and create a sequence, but you must include all of these.

In your customer journey, you can include intimacy, provide a plan, cover objections, and give them the best path to ensure long-term success.**

CLAUDE’S RESPONSE

I'll craft an email using the APPE format that builds on our planned conversation, while maintaining executive business tone and incorporating the stakeholder's perspective.

Subject: Meeting Request: Aligning Culture Initiatives with Sales Excellence

Dear John,

[Acknowledge] I appreciated your insights during our recent leadership meeting about the competitive pressures in attracting and retaining top sales talent. Your point about

relationship builders who can consistently deliver results being crucial to our market leadership really resonated.

[Prepare] I would value your strategic guidance on ensuring our culture initiatives directly support your sales organization's talent needs and performance goals. I'm proposing a focused 30-minute discussion to:

- Understand your perspective on key characteristics of top performers
- Explore how culture initiatives could better support talent retention
- Identify specific ways to strengthen your team's competitive advantage

[Project] Your expertise in building high-performing teams would help shape our approach to creating an environment where top talent can thrive and grow their careers while delivering outstanding results. This collaboration could enhance our ability to attract and retain the relationship builders who drive our market success.

[Prehandle] I understand your time is valuable and focused on business impact. I'll come prepared with specific discussion points and ensure our conversation remains practical and results-oriented.

[Excite] Would you be available next Tuesday at 2:00 PM or Thursday at 10:00 AM? I look forward to exploring how we can partner to support your team's continued success.

Best regards, [Name]

Executive Communications Lead Small Business Financial Services