

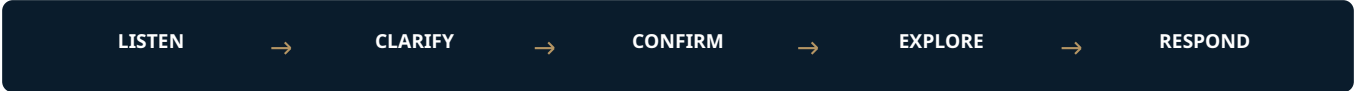
Discovery Gap

Human Service. Smarter Systems.

Do we understand the need before answering?

Use these questions to find where premature assumptions turn into premature refusal.

THE CORE FLOW



THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 Before answering yes or no, do employees clarify what the customer is actually trying to accomplish?	<div></div> <div></div> <div></div>
2 Can employees distinguish between the solution the customer requested and the underlying outcome the customer needs?	<div></div> <div></div> <div></div>
3 If the exact request is unavailable, do employees know what legitimate alternatives, adjacent services, escalation paths, or referrals may still help?	<div></div> <div></div> <div></div>
4 When the business truly cannot help, can employees explain why and give the customer a useful next step rather than simply ending the conversation?	<div></div> <div></div> <div></div>
5 Are repeated requests the business cannot serve captured so leadership can identify confusing marketing, training gaps, referral needs, or potential service opportunities?	<div></div> <div></div> <div></div>

REMEMBER

The goal is not to avoid saying no. It is to make sure no is answering the right question.

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SEPARATE THE REQUEST FROM THE NEED

Use one real customer request and trace what the customer was actually trying to accomplish.

CUSTOMER REQUEST What did the customer specifically ask for?
UNDERLYING NEED What outcome were they actually trying to achieve?
DISCOVERY QUESTION What question would help clarify the need?
CONFIRMATION How would you repeat the need back before solving it?
OPTION 1 What legitimate option could meet the need?
OPTION 2 What other legitimate path, service, timing, or referral could help?
LIMIT / TRUE NO What cannot the business safely or reliably provide?
USEFUL NEXT STEP If the answer is no, what can the customer do next?
PATTERN TO CAPTURE Should this request be tracked as a recurring unmet need or expectation gap?
FIRST IMPROVEMENT TO MAKE What one change would help employees understand the need before deciding on the answer?

READY FOR A SECOND SET OF EYES? Take the Kasence Flow Check at kasence.com/contact
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