

CROSS-ROLE INSTRUMENT · CLIENT REALITY SPINE

Knowledge Transfer Protocol

How to extract what a client knows that you cannot look up, and how to convert it into a marketing input. The second half is the part almost every knowledge-transfer document in circulation leaves out.

THE DECISION THIS TEMPLATE PROTECTS

What this client knows that you must extract before you are entitled to build anything.

ROLE

Every role, every level

COURSE PLACEMENT

**Main Course Module 1 ·
Business, Market &
Competitive Discovery**

REVISION

**Version 1.0
Current as of 19 August
2026**

Run this after the Client Handover Pack, never before. Handover captures commercial and operational truth. This captures domain truth, which lives in people's heads rather than in documents. Work through **Part One** with five different sources, not one. Then complete **Part Two**, which is where extracted knowledge becomes a decision somebody can act on. A completed Part One with an empty Part Two is a transcript, not an asset.

BEFORE YOU START, YOU NEED

- A completed Client Handover Pack, or at least the commercial reality section of one.
- Permission to speak to sales and to service, not only to marketing.
- Two or three existing customers the client is willing to introduce you to.
- A recording setup and consent to use it. Memory is not a research method.

01 Why this is now the highest-value skill in the role

Generating a campaign, an article or a landing page costs close to nothing. What remains scarce is knowledge that has never been written down anywhere a model could have read it: why customers actually buy, which objections kill deals, what the founder refuses to do, what breaks after purchase.

A marketer who can get that out of a client will out-produce one who prompts more skilfully, because they are working from inputs nobody else has. This protocol is how that extraction becomes repeatable instead of accidental.

The failure mode is asking the marketing contact everything. They are the person furthest from the buying decision and closest to the brand deck. Five sources, deliberately.

02 **Part One • Extraction, by source**

SOURCE 1 • FOUNDER OR OWNER

- Why does this business exist, and what would you refuse to do even if it made money?
- Which customer made you proudest, and which one do you regret taking?
- What do competitors say about you that is unfair, and what do they say that is fair?
- What have you been talked into before that you regretted?

WHAT ONLY THE FOUNDER KNEW

SOURCE 2 • SALES

- What are the three objections you hear most, in the customer's own words?
- Which leads waste your time, and what do they have in common?
- When you lose, who do you lose to and why?
- What do you wish marketing would stop promising?

WHAT ONLY SALES KNEW

SOURCE 3 • SUPPORT OR SERVICE

- What do customers misunderstand at the point of purchase?
- What goes wrong most often after they buy?
- Which questions come up so consistently that you have a saved reply?

WHAT ONLY SUPPORT KNEW

SOURCE 4 · OPERATIONS OR DELIVERY

- How much can you actually deliver in a month at current quality?
- What happens to quality when volume rises by half?
- Which type of customer is most expensive to serve?

WHAT ONLY OPERATIONS KNEW

SOURCE 5 · EXISTING CUSTOMERS

- What were you doing on the day you decided to look for this?
- What nearly stopped you from buying?
- Who else did you consider, and what made you choose this?
- How would you describe this to a colleague?

WHAT ONLY CUSTOMERS KNEW

Their phrasing matters more than their reasoning. Record exact words.

03 Part Two · Conversion into marketing inputs

Extraction without conversion is a folder of notes nobody reopens. Map every piece of knowledge to the specific decision it changes and the role that owns that decision.

KNOWLEDGE EXTRACTED	WHAT IT FEEDS	ROLE THAT OWNS IT	DONE?
Real objections in the buyer's words	Ad angles, FAQ content, sales page structure	Paid, Content	
Loss reasons	Exclusion targeting, qualification friction, offer design	Paid	
Words customers actually use	Query portfolio, page titles, entity vocabulary	SEO, Content	
Proof the client already holds	Evidence layer, case content, trust assets	Content	
Fulfilment ceiling	Volume targets, pacing, when to stop generating leads	Manager, Paid	

KNOWLEDGE EXTRACTED	WHAT IT FEEDS	ROLE THAT OWNS IT	DONE?
What the founder refuses to do	Brand boundary sheet, creative guardrails	Content, Social	
Post-purchase failure points	Retention content, lifecycle sequences	Content, Manager	
Most expensive customer type	Targeting exclusions, offer tiering	Paid, Manager	

THE SINGLE MOST VALUABLE THING YOU LEARNED, AND WHAT IT CHANGES

If nothing you learned changes the plan you had already half-formed, you did not extract anything. Go back.

04 Part Three • Contradictions

Different sources will disagree. The disagreements are usually more informative than the agreements, and they are almost always thrown away.

WHAT WAS DISPUTED	SOURCE A SAID	SOURCE B SAID	YOUR READ, AND WHY

WHICH BELIEF IS THE CLIENT MOST CONFIDENT ABOUT AND LEAST ABLE TO EVIDENCE?

Handle this carefully in conversation, and precisely on paper.

05 Part Four • The Client Knowledge Asset

Compress into a living document that every role on this account works from. Version it. Date it. Revisit it every quarter, because sales learns new objections faster than marketing updates its messaging.

SECTION	CONTENT	LAST VERIFIED
Who buys and why		
Who does not buy and why		
The three objections that matter		
Language customers use		
Proof we can stand behind		
Claims we may not make		
Capacity limits		
Open questions		

JUDGMENT PROMPTS

1. Where did the founder and the sales team disagree, and which one is closer to the buyer?
2. Which extracted fact would a competitor pay for, and are you treating it accordingly?
3. What did you learn that makes the plan you arrived with worse?
4. Which of the five sources did you skip, and what did that cost you?

WHAT THIS TEMPLATE WILL NOT DO FOR YOU

- It will not work if you delegate the conversations. Extraction is the skill; the transcript is a by-product.
- It will not make a client interesting. Some businesses genuinely have no proprietary knowledge, and finding that out early is worth the effort.
- It does not replace market research. This captures what the client knows, including what they wrongly believe.
- The mapping table is not exhaustive. If knowledge does not fit a row, write a new row rather than discarding it.

THE DEFENSIBLE OUTPUT

A versioned Client Knowledge Asset that every role on the account works from, with a completed conversion table showing which decision each piece of knowledge changed.

Portfolio-eligible, and unusually strong evidence. It shows you can get information out of people, which is harder to demonstrate and harder to fake than any campaign result.

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