Rainmaking Conversation Planner

Date: __August 27__   Prospect / Client Name: __ABC Engineering__

Current Situation Description:

- *Introducing new product to a current client on Tuesday at 11am*
- *Client has another provider for this product*
- *I do not know if the client is happy or unhappy with the current provider*

Business Development Goals for this Client / Prospect:

- *Sell $18k of products to this client per year of the new service line, on top of the $14k on avg. per year in revenue we already receive from this client*
- *Continue to network with this client to find new potential areas of business*

Desired Next Outcome:

- *Get meeting with management team to discuss how they can get more leverage and success out of this area at their company with our new product*

Strengths (what's working in my favor):

- *I have a 7-year relationship with client and management team*
- *Our new product has several performance advantages over the competitor*
- *We just delivered a consulting project to this client that saved them $2 million in costs*

Vulnerabilities (what's working against me):

- *There is a competitor – I don't know the current level of client satisfaction*
- *This product is new even though our relationship with the client is long-standing*
- *A new person has taken over as CEO of the client company – I may need to do some 're-establishing' of the relationship*

Next Actions:

- *Prepare my knowledge and my marketing materials in the new product area*
- *Send an email the day before the meeting outlining the new product advantages*
- *At the Tuesday 11am call find out situation regarding current provider*
- *Ask questions based on areas where I know we have a strong advantage*
- *Generate enough interest to get the management group to meet with me*
- *Build rapport with the new CEO, and begin my relationship with her*

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Current Situation Description:

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Business Development Goals for this Client / Prospect:

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Desired Next Outcome:

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Strengths (what's working in my favor):

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Vulnerabilities (what's working against me):

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Next Actions:

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