



CUSTOMER INTERACTION PLANNER

When it comes to substantive phone calls or meetings with a prospect or customer, **failing to plan means planning to fail**. If any call or meeting is worth having, it is worth preparing for. These principles in this sales playsheet will help to ensure that every significant customer interaction creates and captures the maximum relevant value for both you and your customer.

SOME KEY PRINCIPLES

UPFRONT CONTRACT: At the start of the meeting, you should agree the purpose, agenda and what each participant wants to accomplish during the meeting. It is often useful to openly share your best possible outcome and seek conditional agreement to it, subject to everyone being satisfied that the agreed goals of the interaction have been achieved.

BALANCE LEARNING WITH TEACHING: No prospect enjoys a “20 questions” approach where the sales person asks a series of data gathering questions. You must always balance your learning with teaching the prospect new things that are relevant to their role, organisation or situation. You should always prepare by identifying what it would take for the interaction to be valuable for both the customer and yourself.

ADVANCE, LEARN SOMETHING VALUABLE OR QUALIFY OUT: The only worthwhile outcomes from a prospect or customer interaction are that they agree to make a significant advance, you learn something valuable that puts you in a better position to win the deal, or you qualify the opportunity out.

BEFORE THE MEETING

Do your research into the organisation and the participants. If possible, agree objectives and a draft agenda for the meeting and confirm by email. Prepare for the meeting by:

- Planning how you intend to create value for each key participant in the meeting
- Summarising the purpose of the meeting and key agenda items
- Planning your opening remarks
- Identifying the key things you intend to TEACH the customer and LEARN from them
- Anticipating the predictable questions they may ask and thinking about how you will respond
- Establishing your best possible outcome for the meeting and your secondary fall-back objective

DURING THE MEETING

- Agree/reconfirm the purpose, agenda and time allocated for the interaction
- Ask each participant what they need to achieve to make the interaction valuable for them
- Explain your best possible outcome and seek their conditional agreement
- Keep your objectives in mind but be prepared to adapt as the interaction unfolds
- Ensure that a teach/learn balance is maintained throughout the interaction
- Listen carefully to what the customer says and always look for the underlying meaning
- Fully explore the implications and consequences of issues before you propose solutions
- Pause and check regularly to ensure that the interaction is on track to achieve its goals
- Seek agreement to your best possible outcome, or if necessary your fall-back objective
- Make sure that all agreed next steps have clear ownership and timeframe
- Close by summarising key points and reconfirming the agreed next steps

AFTER THE MEETING

- Always follow-up within 24 hours, documenting the conclusions and actions in writing
- Set a diary reminder on the due date for agreed advances

VALUE SELLING SYSTEM® CUSTOMER INTERACTION PLANNER		
COMPANY	VENUE/LOCATION	DATE
		TIME
KEY PARTICIPANTS	THEIR GOALS (What would make this meeting valuable for them?)	
PURPOSE OF MEETING		
AGENDA (Key things to cover)		
OPENING REMARKS		
TEACH (Key things you plan to share with them)	LEARN (Key things you plan to learn from them)	
PREDICTABLE QUESTIONS (What are they likely to ask?)	RESPONSES (How do you plan to respond?)	
BEST POSSIBLE OUTCOME		
FALL-BACK OBJECTIVE		