

# Cisco HCS Partner Acceleration Program

## Pre Call Planning Guide



**Pre Call Planning:** \_\_\_\_\_

### Meeting Information

Place: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

- ☐ What is the objective of the call? What do you want as an outcome of this meeting?
- ☐ Have you reviewed the Survey of Questions to determine what you need to know and what you will ask?
- ☐ Have you reviewed your CRM files or your Account Plan?
- ☐ Anticipate your clients potential objections or new questions they may ask and your answers. “ *What has changed if anything since our last meeting?*”
- ☐ Role-Play your Opening.
- ☐ Plan the sequence and roles of all participants, clients, outside parties and our company.
- ☐ Have you made sure every attending knows their role?
- ☐ Review all previous notes and client information. Do you have their Organization Chart and company brochure?
- ☐ What are the various personality styles of each participant?
- ☐ Do you have the necessary brochures, data sheets, demo software with you?
- ☐ *Have you checked your presentation material and equipment to make sure everything is working properly?*
- ☐ Do you have plan on how you will close the meeting? What are the next steps? Action items, etc. “Leave something for them to do for you!”
- ☐ What does their web site say about them?
- ☐ What type of Regulatory issues face this firm?
- ☐ What are the top 3 trends in the industry?
- ☐ Who are their top competitors?
- ☐ What are “key words” in the prospects business?

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- ❑ What is the prospects vision and marketing message?
  - ❑ What is their value proposition?

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|--|--|
| <input type="checkbox"/> What facts do you know?               | <input type="checkbox"/> What person will most likely will provide that information? |
| <input type="checkbox"/> What information do you need to know? | <input type="checkbox"/> What assumptions are you making that need to be confirmed?  |

Based upon what you do know, what might be the business challenges your prospect is focused on

1. \_\_\_\_\_
2. \_\_\_\_\_

Based upon your knowledge of the business challenges, how will your solutions be presented to address these challenges?

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What are the business benefits or expected results that would be achieved by implementing a our solutions?

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### **Identify service(s) opportunities**

Define any service opportunities that link to the technology solutions that support the business initiative.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What is your overall sales Value Proposition Statement to the customer based upon the Discovery information?

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Please Complete the Following document prior to each face to face meeting:

<b><i>Objective of this Meeting, What is the Desired Outcome or Discussion:</i></b>	<b>Have Your Validated Pre-Calling Plan Guide?</b>

<b><i>Justification for this Encounter:</i></b>	

### ***Expected Participants***

<b><i>Our Company Team</i></b>		<b><i>Prospective Client's Team</i></b>
<i>Names</i>	<i>Titles</i>	

### ***Desired Outcomes***

<b><i>Maximum</i></b>	<b><i>Minimum</i></b>

### ***Background Information***


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### *Meeting Logistics*

<b>Handouts</b>
<b>Other</b>

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### *Meeting Event Planner*

<i>Questions</i>	<i>Responses</i>

### *(Our) Internal Resource Requirements*


### *Conclusions*

<i>Information We Received</i>	<i>Information We Gave</i>

### *Agreed Upon Next Steps*

<i>Our Company</i>	<i>Guest Team</i>

### *Additional Comments*


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