

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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- What facts do you know?
- What information do you need to know?
- What person will most likely will provide that information?
- 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?

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

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:

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

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

Expected Participants

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

Desired Outcomes

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

Background Information

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Meeting Logistics

Handouts
Other

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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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