



Track: Customer Relationship Development

Unit 4: Planning Your Customer Interaction

Vicki Flesher, Energy Solutions Center



The Benefits of Planning

Any call worth making is worth planning! Review the list below, and check the boxes beside the statements that identify benefits of planning your sales interaction.

- ☐ Identifies the opportunity with the customer – what problem they are trying to solve, and what solutions might be available
- ☐ Identifies the benefits the customer would receive if the solution was implemented
- ☐ Defines the desired outcome of the interaction
- ☐ Makes the time invested more valuable to the customer and the Account Representative
- ☐ Results in a positive first impression
- ☐ Identifies the potential stakeholders in the account
- ☐ Creates a purpose for the dialogue with the customer
- ☐ Leaves the interaction with a next step defined
- ☐ Anticipates and prepares for objections that the customer might have
- ☐ Prepares questions to engage the customer in meaningful dialogue
- ☐ Identifies who from the LDC should participate in the interaction and what role each team member should play to advance the opportunity
- ☐ Prepares all necessary collateral materials so that success can be achieved
- ☐ Builds the confidence of the Account Representative as they approach the customer opportunity
- ☐ Shortens the selling cycle

Learning Objectives

By the conclusion of this session, participants will be able to:

- Identify a goal for the customer interaction that furthers the sales process and the relationship with the customer
- Recall the definition of the term commitment objective
- Recognize the two components of a sales cycle plan
- Identify the six fundamental components of a well done pre-call plan
- Recognize at least three benefits of planning a customer interaction



Take a few minutes to reflect and answer this question: What is the most frequently made mistake in selling? Why do our efforts fail? Capture your ideas below.

The most frequently made mistake in selling is:

PLANNING FOR COMMITMENT

Begin with the end in mind. In sales, you must visualize the result or commitment you want to get from the customer, and then work backward to gain that commitment.

ESTABLISHING A COMMITMENT OBJECTIVE

- A goal you set for yourself to gain _____ from the _____
 - _____ in the future
 - _____
- This goal should _____ your relationship and your sales cycle with the prospective customer

COMMITMENT OBJECTIVE EXAMPLES:

- To get an _____ or _____ scheduled
- To meet with a builder, homeowner, or customer's facility
- To get the opportunity to _____ gas solutions
- To set a meeting with other key _____
- To get a signed _____ agreement

CRAFTING A COMMITMENT OBJECTIVE

1. The phone rings and a residential customer informs you that their gas heater has failed.
2. You have a meeting with a builder that is building a strip mall. The mall will have a variety of retail stores, and two food service outlets.
3. You stop into an industrial prospect's site that is using mostly electricity, and is experiencing outage issues on a fairly regular basis.

BUILDING PRODUCTIVE CUSTOMER RELATIONSHIPS

You can't ask for a commitment that is larger than the size of your relationship with a customer. Take a few minutes and think about how you build significant customer relationships, and capture your ideas below.



- Multiple _____, over _____
- Follow through on _____ made
- _____ for the customer
- Be _____
- Be _____ to customer calls, questions, or issues
- _____
- _____
- Be _____ and _____
- Be _____

CREATING A SALES CYCLE PLAN

WHAT IS A SALES CYCLE PLAN?

- A tool to assist you in strategically approaching account development
- A roadmap that defines the interactions that you will need to accomplish the vision you have established
- A process that assists you in identifying the stakeholders of the customer that you need to build relationships with
- A series of interaction opportunities and commitment objectives



PLANNING YOUR SALES CYCLE

- Identify a _____ for the customer relationship
 - What products and services could you position that would add _____ to the customer's situation?
- Assess your current _____
 - Where are you in relationship to your vision? What products and services do you currently provide?
- Identify the _____ between your vision and your current reality
- Identify the decision maker or stakeholders within the customer's organization that you need to interact with to close the _____
 - Who has _____ to make the _____ that will advance you toward your vision?
- Identify opportunities to _____ with those individuals to build a relationship and create trust
- Think about the _____ of your interactions, and what _____ you want to gain in each interaction to help you achieve forward progress toward your vision

CREATING A SALES CYCLE PLAN

RESIDENTIAL SCENARIO

You have just learned of a new 300 home subdivision that is being built in your area, and you make a phone call to set an appointment with the residential developer to talk about utilizing natural gas.

You are interested in positioning heating and water heating via natural gas, at a minimum, and further positioning the use of natural gas stoves, dryers and outdoor amenities. Based on averages, you project that the profit on an annual basis to the LDC is approximately \$150,000.

Below is an example of a sales cycle plan for this scenario.

Interaction Opportunity	Commitment Objective
Phone call to the Developer	Appointment with the Developer
Appointment with the Developer	Introduction to the Builder(s) that will be used
Meeting with the Builder(s)	Meeting to include the Builder(s) and other construction staff of the Builder(s)
Meeting with Builder(s) and Staff	Commitment to Natural Gas solution
Meet with builder/developer and utility engineering department to discuss path of main, service and meter locations	Route the main, services and meters in the most economical path that is agreeable to all parties

CREATING A SALES CYCLE PLAN

COMMERCIAL SCENARIO

You make a call on a 200 bed hospital in your community and learn that they are using electricity as their primary source of energy, and that they are trying to reduce energy costs.

You believe that the hospital could generate its own power with a CHP system, and want to sell the concept. This could be an investment of \$300K in an engine driven generator, and could have a three to four year payback. To get a commitment to this would involve doing some energy analysis and projecting the cost savings.

Below is an example of a sales cycle plan for this scenario.

Interaction Opportunity	Commitment Objective
Meeting with Plant Manager	Introductory meeting with the Director of Engineering
Meeting with Plant Manager and Director of Engineering	Meeting to review ideas with Plant Manager and Director of Engineering
Meeting to review ideas and gather data for an energy analysis	Meeting to review the energy analysis
Energy analysis review	Meeting with CFO and CEO to gather input and review energy analysis
Meeting with CFO and CEO	Meeting to review proposal
Proposal meeting	Commitment to CHP System

PRE-CALL PLANNING

- **Establish call goals and objectives**
 - Commitment objective
 - Other goals and objectives
- **Review intelligence**
 - About the neighborhood or home
 - About the business
 - About the individuals you will meet
 - About your competition
- **Prepare to position solutions**
 - Identify the problems you can solve, and what products/services create the desired outcomes
 - Prepare to position the benefits of the solutions that you identified
 - Anticipate the obstacles or objections you might encounter, and make a plan to handle them
- **Plan the questions you will ask**
 - Customer intelligence
 - Competitive intelligence
 - Decision making process
 - Budget
 - Time frame
- **Plan for participation**
 - Identify who from the prospective customer's organization will participate
 - Identify who from the LDC will participate
 - Identify the role of each participant in the call
- **Final preparation**
 - Confirm the meeting and the allocated amount of time
 - Create an agenda for the meeting
 - Prepare necessary collateral materials



Homework/Application Assignment

- Identify a prospective account that you would be interested in developing or a current customer relationship that you could expand, and create a sales cycle plan for the account on the following page.

HOMEWORK: CREATING YOUR SALES CYCLE PLAN

Think about a prospective customer that you are interested in doing business with or a current customer with whom you see opportunities to expand your relationship. Plan your sales cycle. Think about your vision for the account, and think about the builder, homeowner or people in the business that you will need to interact with. In each interaction, what commitment objective will you set that moves your sales cycle forward?

The Customer/Prospect:

My Vision for the Account:

My Current Reality:

Key People I Need to Know:

Interaction Opportunity	Commitment Objective