

KAM High Performance Program: *Winning New Customers* - Modules 1-4

Module 1

Cold Prospects & Compelling Reasons to Talk

Tutorial

Individual Pre **Group** Individual Post

90 minutes

Module Objectives

1. To define the prospecting process and targets
2. To identify cold prospects and key people
3. To identify the possible needs
4. To define the compelling reason to talk
5. To plan the cold prospect communication process

Assessed Output Task

Present the cold prospects list along with the possible needs and compelling reason to talk

High Performance Scorecard

1. I have a new business target and development process plan
2. I have identified my cold prospects and people to talk with
3. I have estimated the likely needs
4. I have defined the compelling reason to talk for each prospect
5. I have completed my cold prospect communication sheet

Module 2

Warm Lead Management

Tutorial

Individual Pre **Group** Individual Post

90 minutes

Module Objectives

1. To identify the source of warm leads and track results
2. To define the most productive warm lead activity
3. To understand the warm lead process
4. To understand the prospect's buying cycle
5. To create a warm lead summary

Assessed Output Task

Present warm prospect targets, warm process and lead summary sheet with planned action

High Performance Scorecard

1. I track my warm prospects from source to conclusion
2. I know my conversation ratio
3. I have defined my warm prospect targets
4. I have completed the warm prospects summary sheet
5. I have identified the warm prospect's buying cycle

Module 3

Prepare the Initial Meeting

Tutorial

Individual Pre **Group** Individual Post

90 minutes

Module Objectives

1. To understand how to prepare for the initial meeting
2. To define the information I require before the meeting
3. To plan my questions and for their questions
4. To anticipate needs and the problem we will solve
5. To identify reference customers

Assessed Output Task

Present the initial meeting preparation for the next prospect meeting

High Performance Scorecard

1. I can explain the process for preparing for the initial meeting
2. For each meeting I define the information I require
3. For each meeting I define the questions I shall ask and expect to be asked
4. I have identified reference customers
5. For each meeting I define the likely needs and problems we will solve

Module 4

Conduct the Initial Meeting

Tutorial

Individual Pre **Group** Individual Post

90 minutes

Module Objectives

1. To explain how to start the meeting
2. To explain how to present the company the "elevator/lift pitch"
3. To use Q&A effectively
4. To help the KA's own Manager to present the customer business case
5. To plan the 'close' of the meeting

Assessed Output Task

Present a meeting report detailing the core needs

High Performance Scorecard

1. I can explain how to start the meeting
2. I can present the company "elevator/lift pitch"
3. I can explain how to use questions effectively
4. I know how to support the KA's own Manager to present the business case
5. I know how and when to close the meeting and gain agreement to the next stage

KAM High Performance Program: *Winning New Customers* - Modules 5-8

Module 5

Product Demonstration & Detailed Needs Analysis

Tutorial

Individual Pre	Group	Individual Post
----------------	-------	-----------------

90 minutes

Module Objectives

1. To plan for the demonstration
2. To brief the demo team about needs expectations and cultural issues
3. To define the detailed customer's needs by group (proc., IT, user, etc.)
4. To identify how we can solve the problem and add value to the prospect
5. To identify the best reference customer

Assessed Output Task

Prepare the demo. – present the detailed needs and our value

High Performance Scorecard

1. I can explain how to plan for the online demo
2. I identify the cultural and communication needs and brief the demo team
3. I can present the detailed prospect needs by group (proc., IT, end user, etc.)
4. I can explain where we will add value to the prospect based on its specific needs
5. I have identified reference customers for each opportunity

Module 6

Prospect Detailed Profile & Plan to Win

Tutorial

Individual Pre	Group	Individual Post
----------------	-------	-----------------

90 minutes

Module Objectives

1. To identify the core information required
2. To map the people and their attitude and influence in the process
3. To define the Plan to Win
4. To define the problem we solve or opportunity we address
5. To create the business case for the Customer Manager

Assessed Output Task

Present the prospect Profile, business case and Plan to Win

High Performance Scorecard

1. I have identified the core information I should know about each prospect
2. I have mapped the people and their attitudes and role
3. I have defined the problem we solve or opportunity we address and value to the customer
4. I have defined the customer business case
5. I can present my Plan to Win for each prospect

Module 7

RFP Process Management

Tutorial

Individual Pre	Group	Individual Post
----------------	-------	-----------------

90 minutes

Module Objectives

1. To anticipate the RFI, RFP, RFQ likely needs and to prepare accordingly
2. To identify and plan the resource requirements of the RFP process
3. To influence the RFP process
4. To ensure the RFP addresses the needs
5. To monitor the RFP process within the customer

Assessed Output Task

Present RFP process plan

High Performance Scorecard

1. I can show how I have anticipated for the customer's next step
2. I can show my RFP resource plan
3. I have identified how to influence the RFP and can show my action
4. I always review the RFP before submission to ensure it meets the identified needs
5. I can explain how to manage the RFP process most effectively

Module 8

Win/lose Review and Ongoing Communications

Tutorial

Individual Pre	Group	Individual Post
----------------	-------	-----------------

90 minutes

Module Objectives

1. To conduct the win/lose audit with the prospect
2. To understand how to respond to prospect feedback
3. To identify additional prospect opportunities
4. To plan the prospect communication
5. To share the results with colleagues

Assessed Output Task

Present the win/lose audit along with the prospect communication plans

High Performance Scorecard

1. I can explain how to conduct the win/lose review
2. I know how to respond to feedback from the prospect
3. I can explain how use the win/lose review to identify new opportunities
4. I can present my prospect communication plan
5. I can show how I share my results with my colleagues