

# Customer Visit – Guidelines V. 4.0



**Company Name:** <Enter company name>

**Product Name:** <Enter product name>

- **Date:** <Enter date>
- **Contact:** <Enter your name>
- **Department:** <Enter department name>
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Document Revision History:

Date	Revision	Revised By	Approved By
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# **Table of Contents**

**1. INTRODUCTION ..... 3**

    1.1. DOCUMENT OBJECTIVE ..... 3

**2. CUSTOMER VISIT PLANNING ..... 3**

    2.1. SECTION OBJECTIVE..... 3

    2.2. VISIT PURPOSE..... 3

    2.3. VISIT PLANNING ..... 3

    2.4. VISIT STRATEGY ..... 3

    2.5. VISIT ROLLOUT..... 3

    2.6. VISIT FOLLOW-UP ..... 4

**3. SUPPORTING DATA ..... 4**

    3.1. SECTION OBJECTIVE..... 4

    3.2. ASSUMPTIONS..... 4

    3.3. RESEARCH INFORMATION..... 4

    3.4. PRODUCT DIAGRAM/ARCHITECTURE ..... 4

Evaluation

COPY

## 1. Introduction

### 1.1. Document Objective

This document describes how to plan a customer visit. The core purpose of a customer visit is to meet customers and listen closely to them with the intent of better understanding their needs.

## 2. Customer Visit Planning

### 2.1. Section Objective

This section describes the stages and steps for building an effective customer visit plan.

### 2.2. Visit Purpose

- Establish a reason and need for the customer visit.
- Establish scope of visit or visits (e.g. exploratory, in-depth).
- Establish the key deliverables that the visit should produce (such as: customer visit report, decision, approval, information, contract, follow-up, schedule, and budget).

### 2.3. Visit Planning

- Alert management to the process and seek approval, if necessary.
- Establish timing and duration of the visit.
- Identify key corporate team members and alternates.
- Assign key individuals to meet at customer site and alternates.
- Establish what information to present to the customer.
- Establish what information to elicit from the customer.
- Establish main discussion points in the meeting with the customer.
- Create a visit schedule/appointment and meeting agenda.

### 2.4. Visit Strategy

- Convene team for a briefing about the visit.
- Establish team member roles.
- Set proper internal and customer expectations of the visit.
- Address potential visit positives and pitfalls.

### 2.5. Visit Rollout

- Note: All communications with the customer are done via the account manager.
- Create a "visit request email" and send it to the appropriate account manager.
- The account manager will forward the "visit request email" to the customer and return with the customer's response and possible dates.
- Secure travel and accommodations for the corporate team.
- Conduct the visit.

## 2.6. **Visit Follow-Up**

- Have team members submit customer visitation reports.
- Receive additional feedback from the customer (via account manager) on the visit.
- Compile/synthesize reports into the major deliverables.
- If necessary, produce executive summary and propagate.
- Follow-up with the customer on agreed upon action items or promises.

## 3. Supporting Data

### 3.1. **Section Objective**

The section provides data in support of claims, assertions, assumptions, and statements made throughout this document.

### 3.2. **Assumptions**

<Describe any assumptions made when writing this document.>

### 3.3. **Research Information**

<If relevant, describe and list the type and scope of research conducted in the course of writing this document.>

### 3.4. **Product Diagram/Architecture**

<If relevant, describe the product's architecture and modules accompanied by a schematic diagram.>