

# Blackblot® PMTK

## Customer Visit



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## 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 the scope of visit/s (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 the 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 Roll-out

- 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 it with the customer's response and possible dates.
- Secure travel and accommodations for the corporate team, for example.
- 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 an executive summary and propagate.
- Follow up with the customer on agreed-upon action items or promises.

### 3. Supporting Data

#### 3.1. Section Objective

This section provides data supporting claims, assertions, assumptions, and statements made throughout this document.

#### 3.2. Assumptions

<Describe any assumptions made while preparing this document.>

#### 3.3. Research Information

<If relevant, describe and list the type and scope of research conducted while preparing this document.>

#### 3.4. Product Diagram/Architecture

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