Blackblot® PMTK
Customer Visit

Company Name: <Enter company name>
Product Name: <Enter product name>

Date: <Enter creation date>
Contact: <Enter contact name>
Department: <Enter department name>
Location: <Enter location>
Email: <Enter email address>
Telephone: <Enter telephone number>

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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 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 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 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 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 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.>