

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 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 the timing and duration of the visit.
- Identify key corporate team members and alternates.
- Assign key individuals to meet at the customer site and alternate.
- 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.
- Send a "visit request email" 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 the account manager) on the visit.

- Compile/synthesize reports into the major deliverables.
- If necessary, produce an executive summary and propagate it.
- 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.>