Conversation Planner

NAME		**Relationship Score:** (Click weblink to calculate)	

BEFORE

OBJECTIVES OF MEETING

Visible

- Introduce new people or services
- Reach a decision
- Brief on progress etc
- Share experience
- Give information
- Exchange views
- Come up with ideas

Hidden

- Build rapport
- Identify business opportunities
- Identify decision makers
- Build awareness of services
- Build credibility
- Manage perceptions

Positioning ideas and storytelling:

Need

Feature

Benefit
(Time, Money, Comfort)

PROSPECT / CUSTOMER / CLIENT (*Circle appropriate descriptors*)

Motivation:

Price-buster

Deal-hunter

Value-buyer

Type:

Economic

User

Technical

Role:

Anti-sponsor

Gatekeeper

Sponsor

Coach

Behavioural preference:

Leading / Following

Opportunity / Fear

Trust / Control

Your needs / My needs

Feelings / Facts

Free flowing / Organised

My best / Better than you

Big picture / Detail

Trust score:

$$T = \frac{C + R + I}{SO}$$

$$T = \quad + \quad + \quad =$$

Estimate scores out of 10.

Conversation Planner

DURING	**OPENING** *I We You opening:*			***I We You***

MIDDLE
Possible questions:

Possible Value Sheet:

Challenge	Current	Future	Value

SHAPE
   Surface
   Hunt
   Adjust
   Paint
   Engage

Focus-5
   Financial
   Customers
   Competitors
   Market
   Resources

Spicy Questions
   Timeline
   Legacy
   No barriers
   Stretch
   Positive / Negative
   Shock
   Non-stick

CLOSING
- Summarise actions/decisions
- Agree next steps

| **AFTER** | - Internal communication required?
- Actions required - who and when
- Date of next meeting | ***CC Note*** |