# Customer Engagement - Planning to Connect

| | | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|---|
| AUDIENCE | We know who the key stakeholders in the customer are that will make or influence the decision to say "yes" to our plan. | | | | | |
| | We have built a communication plan that identifies who, how and when we would like to engage customer stakeholders in our plan. | | | | | |
| | **For each audience we have leveraged resources to understand as much about them as possible:** | | | | | |
| | • Their preferred style of operating. | | | | | |
| | • Their commercial priorities and KPIs. | | | | | |
| | • Their perspectives of us as a supplier and the category. | | | | | |
| BEHAVIOUR | **We are clear on what success looks like at the end of the meeting including:** | | | | | |
| | • Next steps and actions. | | | | | |
| | • What we want them to say "yes" to. | | | | | |
| | • The 3 – 4 key messages we want them to leave with. | | | | | |
| CONTENT | **The structure of the content for the meeting follows the principles of great selling:** | | | | | |
| | • Customer's corporate and category needs are validated and explored further.<br>• Demonstrates you are interested in them; creates an opportunity for meaningful dialogue and greater understanding. | | | | | |
| | • There is a motivational commercial hook that shows the size of prize you believe to be available for the duration of the plan (must be in a metric important to the customer). | | | | | |
| | • You align on the **CONTEXT** of the category: mega trends; performance; their relative performance; performance of key segments (size, trend). | | | | | |
| | • INSIGHTS of key consumer and shopper behaviours are shared (including category strategy) with a focus on the insights most linked to the "Big Bets" and activations. Summarise with the "Big Bets".<br>• **TOP TIP**: what insights will be new news to them?; how much customer specific insight do you have? | | | | | |
| | • We have identified the essential insights that back-up our plan rather than sharing all of our thinking and research. | | | | | |
| | • Brand Plans are shared as the **SOLUTION** to the "Big Bet" opportunities. Each presentation focuses on the benefits to consumers, shoppers and the customer (in their language). | | | | | |
| | • At the end of each Brand Plan presentation there is a clear recommendation on what the customer needs to do to realise the opportunity. | | | | | |
| | • There is a recommendation of what needs to be done on core business and path to purchase drivers to optimise the "Big Bet" opportunities. | | | | | |
| | • It is clear how the commercial hook is achieved from the activities outlined. | | | | | |
| | • There is a strong summary of the meeting with key messages, key customer benefits and a recommendation on next steps. | | | | | |

**5: Completed to high standard; 4: Almost complete; 3: Progressing well; 2: Initial thinking done; 1: Not done.**

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| DELIVERY | The meeting has been positioned in a motivational way for the customer (e.g. NOT brand presentation day – but "Your Tool Kit for Growth"). | | | | | |
| | Invitations have created some element of intrigue and inspiration. | | | | | |
| | There is a core theme that runs through the meeting. | | | | | |
| | We have identified the presenters that will best fit the audience that is attending. | | | | | |
| | All internal presenters have been fully briefed on the customer's agenda, their perspective of us as a supplier; customer language; where they fit in the flow of the overall meeting. | | | | | |
| | The meeting has a blend of presentation methods to engage all styles (present; discuss; brainstorm, story boards, videos, samples, real consumers/shoppers). | | | | | |
| | The layout of the room creates opportunity for movement and interaction. | | | | | |
| | We have created material that uses the customer's language and visuals. | | | | | |
| | **There have been three review/practice meetings:** | | | | | |
| | • Alignment on key messages and presentation method. | | | | | |
| | • Practice with flow, visuals and changeovers. | | | | | |
| | • Creating the magic – team work; supporting each other; language and body language control. | | | | | |
| | We have anticipated the 3 most difficult questions we could be asked - have prepared responses and are clear who will answer each question if asked it. | | | | | |
| | We know how we would re-shape the agenda if time for the meeting was cut by 25%. | | | | | |
| | We are clear what we are giving as a summary of the meeting – should be more than key slides, e.g. a 2 pager with key messages. | | | | | |
| | We are clear on whose responsibility it is to lead the building of the relationship with each member of the customer's team – this person should lead interaction over breaks; gauge their level of engagement and respond appropriately. | | | | | |
| | Technology has been tested in advance. | | | | | |
| EVALUATION | We are clear on how we follow-up and the customer's perspectives on the day.<br>• What worked well and suggestions for improvement. | | | | | |
| | An internal review of the day is planned within 48 hours of the actual meeting. | | | | | |
| | There is a planned follow-up that summarises the key messages, key discussions and key outputs from the day – done in a way that engages and delights. | | | | | |

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