

# Friesen, Kaye and Associates



**Friesen, Kaye and Associates**  
The Experts in Knowledge Transfer  
and Workplace Performance

## Facilitating Effective Customer Meetings

Many sales and pre-sales representatives are required to make effective product demonstrations that address customer key business requirements during customer meetings. In this program you will facilitate a customer meeting using an already developed presentation demo, which creates linkages between your customers' challenges and relevant products and services. You will practice skills and techniques that control the demo environments, including handling customer objections. You will develop skills that lead and support your ability to manage customer meetings and demos for maximum results.

### Who Should Attend?

- Sales and pre-sales representatives required to plan and conduct effective demonstrations during customer meetings.
- Technical product and application specialists who conduct or assist in customer product demonstrations.
- Sales managers responsible for planning, coordinating and conducting customer meetings, that include product demonstrations.

### Key Benefits

1. Plan and practice facilitating a 20-minute meeting, including a demo which is recorded for your personal viewing.
2. Receive constructive feedback from skilled facilitators experienced in conducting customer meetings and demonstrations.
3. Build a set of best practices that create linkages between your customers' challenges and your product and services.
4. Identify techniques to handle customer attitudes including resistance, skepticism and objections.
5. Receive a comprehensive manual consisting of checklists, decision tables and job aids.

### Post-Learning Sustainment

As a participant in an FKA program, you are entitled to complimentary Post-Learning Sustainment:

- Transfer Strategy: one-hour online, live-facilitated coaching session (2-3 weeks post program) to maximize and reinforce learning.
- One-Year Hotline: connect with our experts to discuss your learning initiatives, lessons learned, successes, challenges and best practices.

# Facilitating Effective Customer Meetings

## Objectives

Upon successful completion of this program, you will be able to:

- Plan and establish a clear framework for managing customer meetings.
- Identify key elements to consider when planning how to effectively conduct a product demonstration.
- Identify key actions required to keep the customer involved, interested and directed toward accomplishing the desired results.
- Identify the key actions to curb unproductive behavior and keep the customer meeting on target.
- Practice facilitating a customer meeting which includes a demonstration of your products and services.

## Agenda

### Welcome and Introductory Activities

- Purpose, objectives and expectations
- Potential reasons for ineffective customer meetings and demos.

### Getting Started

#### Prior to the Customer Meeting

- Complete call plan
- Logistics
- Client expectations
- Client attendees and their roles
- Your Organization's Team-roles and responsibilities
- Purpose and objectives of the meeting
- Action items required prior to this meeting and responsibility
- Value proposition needed to conveyed in this meeting
- Customer key business requirements
- High yield questions to ask
- Potential objections
- Plan and practice the product demonstration
- Creation of an agenda

### Practice Completing Your Call Plan

#### Beginning the Customer Meeting

- Set the stage
- Deliver relevant 30 second impression – use quote, anecdote, example
- Introduction and establishment of credibility
- Introduce the agenda
- Set the customers' expectations
- Identify and confirm business challenge
- Relevant customer story
- Solution (demo) preview



## Agenda (continued)

### Practice Your Meeting Introduction

Keep the Customer Meeting Moving

- Focus discussion on purpose and desired outcomes
- Conduct demo
- Ask high yield questions
- Supporting verbal and non-verbal behavior
- Handle customer objections
- Maintain a balanced meeting pace
- Generating Action and Concluding the Customer Meeting
- Specify what actions need to be taken
- Conclude the meeting

### Planning Ahead and Wrap-up-of-Program

- Action plan
- What's next