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Preparing for a Customer Meeting
Workshop Worksheet

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Preparing for a Customer Meeting
An Attain Academy Workshop

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Preparing for a Customer Meeting
Workshop Objectives

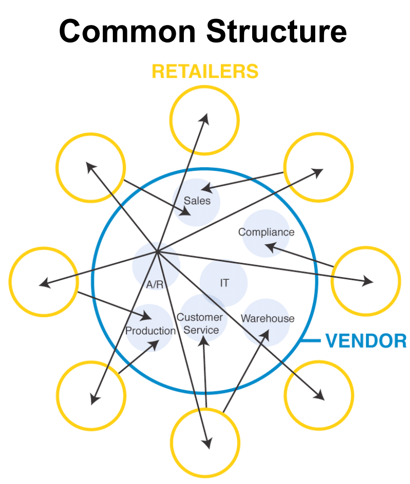
This workshop is designed to help you …

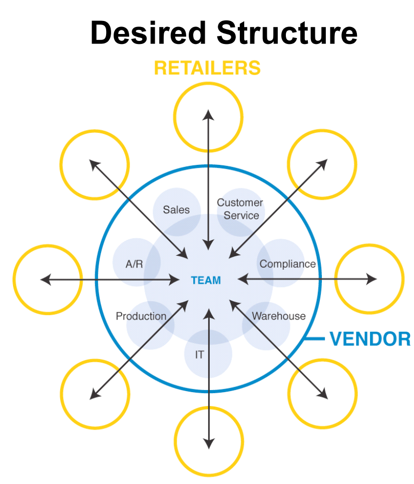
- Determine the type of meeting you want to have with your customer
- Evaluate the best structure for the meeting and determine who should attend
- Identify what information and analysis you will need to prepare for the meeting
- Schedule the meeting and prepare a meeting agenda
- Learn basic meeting tips
- Understand how to follow up after the meeting to encourage success

Preparing for a Customer Meeting
Workshop Outline

1. Introduction
2. Types of customer meetings
3. Meeting structure
4. Preparing information and analysis
5. Scheduling the meeting
6. Preparing the meeting agenda
7. Meeting etiquette
8. Meeting follow up
9. Conclusion
   a) Workshop review
   b) Workshop self-assessment

1. Introduction
Taking control of deductions





1. Introduction
Types of deductions

Intentional	**Preventable**	**Unauthorized**
Typically budgeted, pre -authorized	Generally result from compliance	Mix of compliance violations and

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Types of customer meetings …

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Meeting structure …

3. Meeting Structure
Determining your meeting structure

Question	Enter responses. Review against "Factors to Consider":
• Is this customer a Key Trading Partner?	
• Where is the customer located?	

3. Meeting Structure
Determining your meeting structure (cont'd.)

Question	Enter responses. Review against "Factors to Consider":
• How is your current relationship with this customer?	
• Who asked for the meeting?	
• What is the goal of the meeting?	

3. Meeting Structure
Determining your meeting structure (cont'd.)

Question	Enter responses. Review against "Factors to Consider":
• Does the customer have a stated meeting policy?	
• What is the nature of the requirements / issues you are going to discuss?	
• Would it be helpful to visit a customer DC or store?	

3. Meeting Structure
Determining your meeting structure (cont'd.)

Question	Enter responses. Review against "Factors to Consider"
• Who is participating in the meeting?	
• How big is the problem / opportunity?	
• Do you want a decision from this meeting?	

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Information / analysis to prepare …

4. Information / analysis to prepare
Key factors

- **Regardless of the type of meeting, all information / analysis mu st:**

4. Information / analysis to prepare
“Meet & Greet” meetings

- **Prior to meeting with the customer, you should complete the following:**

4. Information / analysis to prepare
“Show & Tell” meetings

- **Before scheduling a meeting, review performance over past year:**

4. Information / analysis to prepare
“Show & Tell” meetings – Performance has improved

- **If you are meeting with your customer to discuss improved performance in preparation for possible settlement discussions:**

4. Information / analysis to prepare
“Show & Tell” meetings – Discussing specific valid issue

- **If you are meeting with your customer to discuss a specific issue or reason code that is a continuing problem:**

4. Information / analysis to prepare
"Show & Tell" meetings – Disputing deductions

- **If you are meeting with your customer to discuss and dispute deductions which you believe to be invalid:**

4. Information / analysis to prepare
"Show & Tell" meetings – Account clean up

- **If you are meeting with your customer to "clean up" the account so have a mixture of deduction types (e.g., valid, invalid):**

4. Information / analysis to prepare
"Settlement & Resolution" meeting

- **If you are meeting with your customer to work on a settlement or resolution:**

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Scheduling the meeting …

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Preparing the agenda …

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Meeting etiquette …

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Meeting follow up …

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Workshop review …

9. Conclusion
Workshop self assessment

Answer the following questions. If you are not sure about the answer, you may want to go back to that section of the workshop

1. Describe 2 different types of meetings you might have with your customer *(section 2)*

2. Assume you have a recurring compliance issue with one of your key customers. The issue has to do with EDI/ASN transaction data. To date, you have received almost $250K in deductions.

   a. What type of meeting would you try to set up? *(section 2)*

   b. What factors would you consider when trying to decide whether have the meeting in person or over the phone? *(section 3)*

   c. Who from your company would you include in the meeting? Who from the customer? *(section 3)*

   d. What type of information would you prepare prior to the meeting? *(section 4)*

3. What are 3 factors you should consider when scheduling a customer meeting? *(section 5)*

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9. Conclusion
Workshop self assessment

Answer the following questions. If you are not sure about the answer, you may want to go back to that section of the workshop

4. Who should you send a draft agenda to prior to your meeting? *(section 6)*

5. Following your meeting, if you send an email to your customer summarizing your understanding of what you both agreed to, how might you word it to protect yourself against future misunderstandings? *(section 8)*

Thank you for Attending
Preparing for a Customer Meeting

- We hope you enjoyed this Workshop and use the information to help your company ***Improve Cash Flow*** and ***Take Control of Deductions***
- Attain Academy offers a wide variety of on-line deduction training formats, including seminars, workshops and on-line discuss groups. Sample training topics include:

Seminar Topics	Workshop Topics
• Deduction Basics	• Developing a Deduction Improvement Roadmap
• Negotiation Tips & Strategies	• Negotiating Deductions – Practice
• Successful Customer Settlement Strategies	• Research Strategies by Reason Code
• Effective Cross Functional Teams	• Facilitating Cross Functional Teams
• Measuring Performance & Managing Scorecards	• Working through the Settlement Process
• Managing Pre-Deduction Notification Information	• Creating a Senior Management "Flash" Report
• *… and more – check website for full listing*	• *… and more – check website for full listing*

Thank you for Attending
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For questions, please contact info@attainacademy.com

For more information on additional Workshops, Seminars, On -line Discussion Groups and membership in Attain Academy, please visit www.attainacademy.com .

Take Control of Deductions