

Challenging Situation

Please complete this prior to training and bring it with you when you attend our seminar. The objective of this exercise is to identify an account, customer or prospect that you find challenging – difficult to penetrate, secure or grow.

With this information, you can apply the material to a “real world” situation plus ask more specific questions. This will increase the value of the course to you, plus create ideas on how to break into and sell to more difficult or competitive accounts.

Include as much information as possible. The more we know, the more likely we are to come up with a solution and successful plan of attack. If you do not know the information requested but have tried to get it, list some of your activities. This is all part of the development process.

1. Name and location(s) of the prospect, customer or account:

2. People you have contact with (or have tried to contact) at this account (names and job titles):

3. Products/Services the customer is using that you supply:

4. Competitors (or in-house capabilities) in the account:

5. Rough quantify of the amount of products/services you would like to sell to this customer (initially and in the future):

6. List the specific challenges or hurdles you have (or have had) in selling to this account:

7. Any other relevant information you have about this account: