Internal Training Script: Mastering Customer Meetings

This script provides a structured approach for the SalesCollab team to conduct effective discovery meetings using the accompanying form.

Pre-Meeting Preparation (15 minutes)

- **Research the Prospect:** Before the meeting, review the company's website, social media, LinkedIn profile, and any available news to understand their business, industry, and potential IT / Marketing / Consulting needs.
- **Set the Objective:** The goal of the first meeting is **not to sell**, but to build rapport, uncover critical pain points, and determine if SalesCollab is a good fit for their needs.
- **Prepare Your Tools:** Have the correct Customer Engagement Form ready (printed or digital) and a pen/laptop for note-taking.

The Meeting: The Consultative Approach (45 minutes)

- **Establish Rapport (5 mins):** Start with friendly conversation. Acknowledge the user's context (e.g., "I know navigating the tech / marketing world can be confusing...").
- **Set the Agenda & Get Permission (2 mins):** "The goal of today's meeting is for me to deeply understand your current business challenges and future goals. I'll be taking some notes using a structured assessment form to ensure I capture everything accurately. Does that work for you?"
- **Discover & Diagnose (30 mins):**
- Use the applicable customer engagement form as your guide.
    - **Ask open-ended questions** (e.g., "Walk me through...", "How often...?", "What is the impact...?") and *listen actively*.
    - **Take detailed notes** on the form.
    - **Dig deep into the pain:** If they mention slow internet, ask how that affects productivity or revenue. Quantify the pain in their own words.
    - **Position as a Peer:** Acknowledge their frustrations. "It sounds like managing multiple suppliers is a huge headache; many of our clients shared that exact challenge before partnering with us."
- **Vision & Qualification (5 mins):**
    - Transition to Desired Outcomes.
    - Help them articulate their ideal future state.
    - Understand their decision-making process, budget and timeline.
- **The Next Step (3 mins):**
    - "Based on everything we discussed, it seems the "……………………………………" (**Proposed Solution**) could be a great fit for addressing (mention their top 2-3 pain points). The next logical step is to put together a tailored proposal for your review."
    - Schedule the next meeting immediately.

Post-Meeting Follow-up (10 minutes)

- **Digitise Notes:** Input data from the form into the Zoho CRM.
- **Prepare Proposal:** Start crafting a personalized proposal that uses their own language and pain points.

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