

Planning Tool Introduction

Taking the time to identify both your intentions for the presentation and your customer's needs enables you to plan a concise message that will help influence your customer and accomplish your goals for the briefing. This planning is the foundation for all successful presentations. Use the information below to help you complete the Planning Tool on the next page.

A. Your Topic

What is the subject of your presentation in your Briefing Center? Consider the amount of time you have and determine the appropriate scope of your topic.

B. Your Intention

What is the overall goal for this customer visit? What results or outcomes do you want to achieve from your specific presentation? This includes what you want your customer to know, do, and feel in relation to both you and your topic.

C. Your Customer

First, identify the key players and their role in the decision making process. Consider how many distinct groups there are in the audience (for example, executive, technical, and financial)?

Next, analyze each audience group by identifying their:

Specific Needs and Relevant Demographics	Consider their needs and their pain points. Do they recognize the need? Do they have a solution in mind, and if so, who might provide it? Identify both their business and their personal needs. If relevant, factor in culture, age range, language, and male/female ratios.
Topic Knowledge and Attitude	Determine how much your customer already knows about the topic and their depth of knowledge. Consider their relationship with your company and their attitude about you and your organization. Identify where they are in the buying cycle and determine the current competitive landscape.
Communication Environment	Take into account the impact of the room size and set-up, time of day, and even current events. If presenting virtually, consider both your and your audience's environment.

D. Your Content

Given your intention and your customer, answer the remaining six questions on the Planning Tool. Your responses will help you prepare a listener-focused, results-getting message using the Mandel Blueprint®.

Planning Tool

Bring a completed, printed copy to your workshop

A. Your Topic:

B. Your Intention – What is the overall goal for this customer visit? What results/outcomes do you want to achieve from your specific presentation?

C. Your Customer – Who is in your audience and what do you know about them?
(If you identified multiple audience groups, analyze each group separately)

Specific Needs
and Relevant
Demographics

Topic
Knowledge and
Attitude

Communication
Environment

Audience 1

Audience 2

Audience 3

D. Your Content – What information do you want to convey in your message?

1.	In relation to your topic, what is the current situation for your customer? What are they experiencing now?	
2.	What changes, pressures, or challenges are creating either problems or opportunities for your customer and/or the business?	
3.	What are the consequences of not acting on the issues described above? How can you quantify the impact of these consequences?	
4.	What solution or recommendation do you have to address the issues above? What do you believe needs to be done?	
5.	What actions will you ask your customer to take, both during and after your presentation?	
6.	How will taking action make a difference for the customer? How is your recommendation differentiated from the competition? If possible, quantify the benefit.	