

PPAF PRE-CALL PLANNING

CONSISTENT USE + TIME = RESULTS

CUSTOMER: _____

PURPOSE: _____

Explain reason for visit, what action you are requesting customer take, and confirm their interest in the discussion.



PROOF: _____

Provide evidence to support your recommendation. Don't make customer just rely on your word, SHOW them documented success others have had when they followed your recommended course of action.



ACTION:

Close for a specific action. Clearly define what you want the customer to do, how to do it, and who to do it with (if applicable). Confirm agreement.



FOLLOW-UP:

Get agreement with customer on about a time/date for follow-up. Be sure to follow-up with customer to ensure they had success with your recommendation and gather their feedback.



NOTES:
