

CONVERSATION PLAN

ORGANISATION	PROJECT	DATE	VENUE	START TIME	END TIME
Company Name	Opportunity Name	dd-Mmm-yy	Location	00:00	00:00
SITUATION: What is the background to the conversation?			PREPARATION: What do we need to do to prepare for the conversation - including the logistics?		
<input type="checkbox"/> OPPORTUNITY PLAN COMPLETED <input type="checkbox"/> STAKEHOLDER ASSESSMENT COMPLETED <input type="checkbox"/> QUALIFICATION CHECKLIST COMPLETED					
THEIR KEY PARTICIPANTS			OUR PARTICIPANTS		
WHO?	ROLE IN DECISION PROCESS	WHAT DO THEY WANT TO ACHIEVE?	WHO?	CONTRIBUTION	
Name	Role in decision process	Personal objective	Name	Role/Contribution	
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Name	Role in decision process	Personal objective	Name	Role/Contribution	
AGREED PURPOSE: What is the agreed purpose and key objectives of the meeting?		AGENDA: What are the key agenda items and timings?		PRE-AGREED NEXT STEP: What do we want them to agree to do as a next step if the conversation achieves its goals?	
WHAT DO YOU PLAN TO TEACH THEM? What key messages are you planning to convey? What HOT TOPICS, DATA POINTS, INSIGHTS, POINTS-OF-VIEW and ANECDOTES are you planning to share?		WHAT DO YOU WANT TO LEARN FROM THEM? What SITUATION, PROBLEM, IMPLICATION, NEED-VALUE and COMMITMENT questions are you planning to ask?		WHAT CONCERNS CAN YOU ANTICIPATE? What FREQUENTLY ASKED QUESTIONS or OBJECTIONS are they likely to raise, and how do you plan to respond to them?	
BUYING ENABLERS: What key buying enablers do you plan to share?		SALES TOOLS: What key sales tools do you plan to use?		MINIMUM SUCCESSFUL OUTCOME: What is the minimum outcome/customer commitment that would make your investment in time worthwhile?	