



Case study for using the Customer-Client-Coach Planner

Introduction

The way in which you deal with customers, providers and partners has become a decisive factor in competition. The Customer-Client-Coach Planner aids you in achieving successful customer and service satisfaction. It serves to prepare for sales talks by enabling you to assess customer personality and behavior-specific customer needs.

Special features of this planner

Using this Customer-Client-Coach Planner results in a change in your perspective. You assess the customer and thus anticipate his or her behavior tendencies. Successful use of this planner thus depends on whether or not you succeed in accurately describing your customer in the two “most tendencies” and “least tendencies” questionnaires. After that it is up to you to apply these results to your customer in a customized sales strategy and talk.

The basic structure of the planner

- Step 1: Select responses: Describe the behavior tendencies of your customer
- Step 2: Tally the responses
- Step 3: Plot the graph
- The subsequent explanations on the “process of preparing for an interview” contained in the planner are useful. They explain what form the mood accompanying the talk and the needs of the respective conversation partner may take. In addition, the sales process tailored to the customer is examined in detail, including bearing, decision-making aids and dislikes.
- Step 4: Customer/Client Language Behavior
- Step 5: Prepare your Sales Talk: You now take concrete steps in applying the above information to preparing your interview, thus implementing your customized talk and sales strategy to opening the interview, identifying and satisfying needs, formulating benefits, concluding the interview and providing service to your individual customers.
- Step 6: Reflect on the Sales Process: Critically analyze the talk you have conducted. Enter the results of how you would adjust your strategy as the new strategy for the follow-up talk in the respective column.

Sample of a completed planner

In the example at hand, Peter Miller, who is head of sales at Personalis, relies on the strategy planner. He became acquainted with this instrument at a persolog® certification seminar and is now implementing his learnings in his preparation for customer and sales talks. In this example, he applies the tool to his customer John Smith, whom he aims to sell a day-long seminar on personality training to. With his very high “D” components, John Smith is a challenging customer; yet having completed the strategy planner, Peter Miller knows how to adapt himself to this customer’s behavior, which in turn increases Peter Miller’s chances of a successful talk.

