

Product Knowledge Worksheet

[illegible]

*Training Instrument 3-2****Competitor Knowledge Worksheet***

Name of Competitor: _____ Date: _____

Headquarters location	
Web address	
Public, private, or subsidiary? (If subsidiary, of whom?)	
Fiscal or calendar year? (If fiscal year, what is the time period?)	
Last year's revenues and profits	
Stock performance over past 12 to 24 months	
Dun & Bradstreet rating	
Financial condition	
Organizational structure	
Key people	
Number of employees	
Number of locations	
Key products	
Prices of key products	
Pricing history	
Target markets	
Distribution mechanisms	

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Training Instrument 3-2, continued

Competitor Knowledge Worksheet

Market share	
Marketing activities	
Short-term strategy	
Long-term strategy	
Topic of any recent articles or news releases (put copies in the file)	
Key accounts (name, salesperson, revenue) and those we want	
Customer comments (quality, service delivery, problem resolution)	
Perception of our firm	
Ways to beat this competitor (maximum of five)	

Training Instrument 3-3

Top Competitors Summary Worksheet

Competitor				
Product				
Price				
Distribution				
Strengths				
Weaknesses				
Opportunities				
Threats				
Other				

Training Instrument 3-4

Individual and Corporate Customer Knowledge Worksheet

Name of Customer: _____ Date: _____

Birth date	
Hometown	
Education	
Family information	
Special interests	
Sensitive issues	
Career information	
Current boss and peer information	
Other people in our firm who know this person, and how?	
Primary job responsibility	
Job performance is based on . . . (business objectives)	
Authority levels	

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Training Instrument 3–4, continued

Individual and Corporate Customer Knowledge Worksheet

Opinions (of you, our firm, our competitors)	
People orientation	
Thinking style	
Key problems, concerns, and challenges	
Priorities (customer and management)	
Our solutions	
Competitors' solutions	
Other information	
Public, private, or subsidiary (If subsidiary, of whom?)	
Years in business and nature of business	
Fiscal or calendar year? (If fiscal year, what is the time period?)	

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Training Instrument 3–4, continued

Individual and Corporate Customer Knowledge Worksheet

Last year's revenues and profits	
Stock performance over past 12 to 24 months	
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Financial condition	
Organizational structure	
Key people	
Number of employees	
Number of locations	
Key products	
Target markets	
Distribution mechanism	
Market share	
Marketing activities	

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Training Instrument 3-4, continued

Individual and Corporate Customer Knowledge Worksheet

Short-term strategy	
Long-term strategy	
Key business issues	
Topic of any recent articles or news releases (put copies in the file)	
Key customers	

Training Instrument 7-1

Where Does My Time Go? Worksheet

ACTIVITY	IMPORTANT, URGENT	IMPORTANT, NOT URGENT	NOT IMPORTANT, URGENT	NOT IMPORTANT, NOT URGENT	ADDS VALUE

Value key: X means "yes," + adds value, = neutral, - subtracts value.

Preparation

1. What is the intention of the communication?
2. What is the essence of the message?
3. What offer/value will you deliver in the communication?
4. What is your request, if any?

Draft the Message

1. Personalized opening and closing:
2. Big picture to details:
3. Present your purpose (value /request, if any):
4. Recap key points and identify next step:

continued on next page

Check for Unintended Consequences

1. What are the possible consequences?
2. Are any of them negative to the task, relationship, or your organization?

Refine

1. Does the message reflect your organization's personality?
 2. Have you used imagery where possible?
 3. Are you in keeping with your organization's tone/manner?
 4. Were you able to deliver any key messages?
 5. Is the communication aligned with the client's style and in keeping with your style?
-

Preparation

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Training Instrument 10-1

Presentation Worksheet

Client: _____

Type of presentation: _____

Purpose of presentation: _____

Five-sensing—Which, why, and how?

How can I enhance the relationship with this presentation?

How can I animate this presentation?

Double-check:

1. Is the presentation customized?
 2. Is it professional?
 3. Is it honest/straightforward?
 4. Is positive language used?
-

Feature and purpose

Benefit: Answers the question, "So what?"

Proof

Feature and purpose

Benefit: Answers the question, "So what?"

Proof

Networking strategies

1. _____

2. _____

3. _____

Tactics . . . first steps

1. _____

2. _____

3. _____

4. _____

5. _____

The ways I will measure success

1. _____

2. _____

3. _____

4. _____

5. _____
