



CUSTOMER ENGAGEMENT STRATEGIES

Worksheet



Customer Engagement

REVISING YOUR BUSINESS PLAN



Reflect + Respond

What strategies could you use to update your current business plan in order to better engage with your customers?



Reflect + Respond

What are my specific goals?

(Identify Strengths, Weaknesses, Opportunities and Threats to these goals)

Strengths

Weaknesses

Opportunities

Threats



Reflect + Respond

What specific actions can you take as you prepare to engage with your customers?



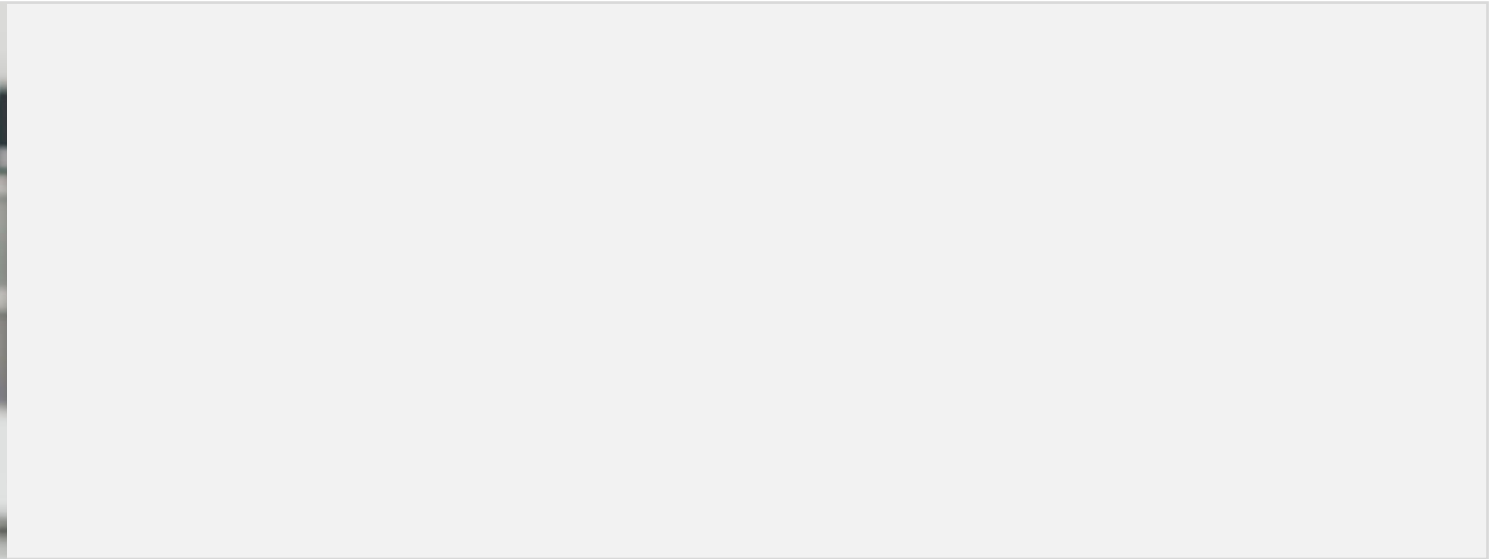
Customer Engagement

USING VALUE-BASED SALES MESSAGES



Reflect + Respond

How could you customize your sales message for **Physicians / Advanced Practice Providers?**





Reflect + Respond

**How could you customize your sales message for
Physician Office Administrators / Office Managers?**





Reflect + Respond

**How could you customize your sales message for
Hospital / IDN Executives?**





Reflect + Respond

How could you customize your sales message for **Health Plan Executives?**





Customer Engagement

REGAINING / MAINTAINING YOUR INFLUENCE



Reflect + Respond

What has changed for your customer (operationally, financially, etc) since you last connected? How might his or her needs have shifted? When was the last time you asked the customer what he or she needed?



Reflect + Respond

Do you need to adjust your value proposition to meet your customer's needs? If so, how?



Reflect + Respond

**Which customers would be most receptive
to this new value proposition?**



Reflect + Respond

**Which products or programs are included
in this new value proposition?**



Reflect + Respond

**Has the competitive environment changed since you last engaged with your customer?
If so, how? For example, have new competitors emerged? Have supply chain issues
affected the availability of your product or competitive products?**



Reflect + Respond

What skills do you need to practice to feel confident engaging with customers? What knowledge do you need to attain?