- Instead of your completing a planning template for each client, your RO will be provided with a pre-populated template from DBForce that contains SOW information and existing relationship details like products, CBVs and revenues. Your RO will be able to aggregate all of your templates into one file that you can send to me and the product partner participants for your sessions. Me and the product partners will be responsible for reading all the templates before your sessions. This will save time for your team and you won't need to give background information during the sessions.

- This week, your RO should go into each of the 10 client profiles and enter the names of the product partners who support those relationships. This is important because those product partners will be tagged with follow up activities for the opportunities identified.

- Your RO should attend each session and be the scribe. They will be responsible for noting each of the opportunities identified and entering those opportunities into DBForce as leads. There will be training for the ROs shortly.

After the sessions:

- DBForce will have a complete list of the opportunities you identified. Your product partners will be able to use DBForce to access the list of the opportunities identified for their product group. You will be able to monitor your team's calling activity against those opportunities and you will be able to use the DBForce list to work with your product specialists on holding each other accountable for follow up activity with clients and prospects.

- I will use the DBForce information to work with you on coordinating your team's efforts on client meetings in support of the opportunities identified.

I'm looking forward to these sessions and please contact me if you have any questions.

In the meantime, please provide me with a few 2 hour timeframes for these planning session for the 10 clients/prospects. I'd like to have all the sessions done by early February.

Thank you everyone!

Regards,
Andrew Gallivan

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