contact plan

|  |  |
| --- | --- |
| **Who**  | Who you’re going to visit and who from your company will attend |
| **What**  | What you’re trying to find out from the customer and what message you want to communicate to them |
| **When**  | When you will visit  |
| **Where**  | Where the meeting will take place |
| **Why**  | Why you want to meet with this customer—what you hope to accomplish |
| **How**  | How you’re going to communicate your message to them |