



Notes

Implementing a Client Acquisition Initiative in your Post

Before you move on:

Before you begin:

- ✓ Have you discussed expectations with each of your trade commissioners?
- ✓ Have each trade commissioner established a contact schedule?
- ✓ Have you discussed this initiative with an HCM?
- ✓ Have trade commissioners identified company needs to which they can respond?
- ✓ Are trade commissioners tracking their contacts in CRM?
- ✓ Have you discussed this initiative with the Marketing Division, aware of the project?
- ✓ Is the timing right?
- ✓ Have you obtained buy-in from your staff?
- ✓ Have you assessed the networking skills of your staff?
- ✓ Has each trade commissioner identified specific market opportunities that the project could build upon?
- ✓ Have you had a debriefing session with your staff?

Step 1: Develop the Road Map for your CAI

Before you conclude:

- ✓ Have you made a point of celebrating the acquisition of new clients?
- ✓ Do you have best practices you can share with others?
- ✓ Have specific training needs been identified throughout the project?
- ✓ Has each trade commissioner identified his/her target segments?
- ✓ How would you do it differently next time?
- ✓ Have you identified start, mid-term and evaluation dates for the project?

Step 2: Identify your Companies

Before you move on:

- ✓ Have you considered using the VTC e-mail notification sent to your post each month to initiate the project?
- ✓ Do you know how many companies each trade commissioner will be contacting in each segment?

Step 3: Research your Companies

Before you move on:

- ✓ Has each company to be contacted been researched?
- ✓ Does each trade commissioner have an idea of his/her companies' products, strategy and experience?