

Pre-Call Planning

Prospect _____ Appointment Date _____

Questions to Prepare for the Sales Call

1. Rehearse: *What has to happen to make this a great meeting?* or *How did we get here?*
2. What is the reason for the call? _____

3. Do they want to fix the problem? _____

4. Did you get invited? _____

5. What is your first question? _____

6. What three questions will you ask to qualify this prospect to do business with you and your company? _____

7. How will they respond to those questions? _____

8. What questions will they ask? _____

9. How will you respond? _____

10. What curve balls do you anticipate? _____

11. What is your agreed to move forward step? _____

12. What will you do if they don't qualify for...? _____



Post-Call Debrief

Directions: Answer the following questions with yes or no to rate your progress with your current prospect

Prospect Name _____	Date _____
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Number	Yes	No	Pipeline Question
1.			I met with the final decision maker
2.			Decision promised upon delivery of quote-proposal-presentation
3.			They have personal severe mental anguish
4.			I have an agreed to budget
5.			They are committed to changing the current relationship
6.			Nothing can go wrong
7.			I have a solution based on their specific needs and problems
8.			They are willing to pay more to solve the problems
9.			This is not a price based sale
10.			The timing is within out normal sales cycle
11.			I have sent the “as we agreed to” letter (AWATL)
12.			I made my follow-up call to the AWATL
			Total Score

	Review
Profile Fit Because...	
Notes	
Next Steps	
Next Steps	

