Pre-Call Planning

Prospe	ect Appointment Date
Qu	estions 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?



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Post-Call Debrief

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

Prospect Name

Date _

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	



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