

SALES CALL PLANNING GUIDE

Customer: _____ Contact: _____ Date: _____

PRE-CALL PLANNING

CALL OBJECTIVES

DISCOVERY QUESTIONS

DESIRED NEXT STEPS

VALUE PROPOSITION (Points of Differentiation)

POINT 1

POINT 2

POINT 3

POINT 4

KEY INFORMATION GATHERED DURING CALL

IN-CALL ACTIVITY

RESULTING ACTION ITEMS

MY ASSIGNMENTS / DEADLINES

CUSTOMER ASSIGNMENTS/DEADLINES

POST-CALL

POST-CALL REVIEW

ACCOMPLISHED OBJECTIVE: YES ☐ NO ☐

WHAT WOULD I DO DIFFERENTLY?

KEY TAKE-AWAYS: _____
