



Pro Call Planning		

Place:		Meeting Date:	g Informatio	<i>n</i> Time:
į	call? Wha	e objective of the t do you want as an of this meeting?	_	What are the various personality styles of each participant?
Ţ	Survey of determine	reviewed the Questions to what you need to what you will ask?		Do you have the necessary brochures, data sheets, demo software with you?
C	□ Have you	reviewed your CRM ur Account Plan?		Have you checked your presentation material and equipment to make sure everything is working
C	potential of questions your answ	your clients objections or new they may ask and ers. " What has f anything since our ng"?		properly?  Do you have plan on how you will close the meeting? What are the next steps? Action items, etc. "Leave something for them to do for you!"
	-	your Opening. equence and roles	٥	What does their web site say about them?
	of all parti	cipants, clients, arties and our		What type of Regulatory issues face this firm?
C	•	made sure every knows their role?		What are the top 3 trends in the industry?
Ţ	client infor	previous notes and mation. Do you Organization Chart	٥	Who are their top competitors?
		any brochure?		What are "key words" in the prospects business?



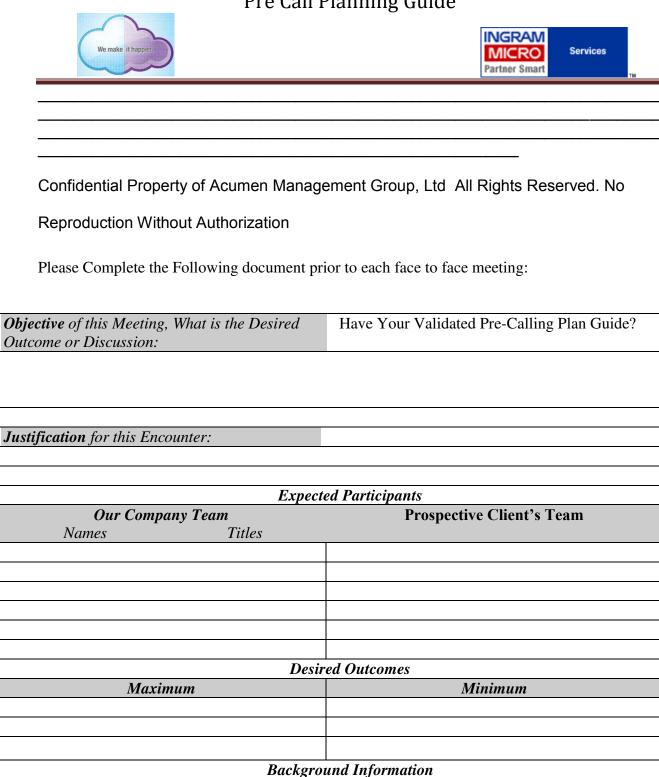


- What is the prospects vision and marketing message?
- What is their value proposition?



What is your overall sales Value Proposition Statement to the customer based upon the Discovery information?

business initiative.







	Meeting Logistics
Handouts	
Other	





# Meeting Event Planner Questions Responses (Our) Internal Resource Requirements **Conclusions** Information We Received Information We Gave Agreed Upon Next Steps Guest Team Our Company Additional Comments



