



Quick Planning Checklist

When you have only a few minutes to prepare for your next customer sales call, focus on this list, from top to bottom, as time allows.

CONTEXT

- What is the customer experiencing as they get on the call with you? Show empathy that they may be just as busy as you.
- Look back - What were you and the customer to prepare since the last call?
- What has progressed since your last interaction that you should know about?

MEETING PURPOSE/DECISION

What decision can the customer make because of this call? What do you need from the call?

RELEVANT TOPICS

Think of a few topics and ask the customer what is most important.

NEXT STEP OPTIONS

Jot a few options for you to have ready for when the call ends, remembering that the call could end abruptly.

YOUR QUESTIONS

List what you need to know that the customer can answer on the call.

BRING VALUE

Prepare a relevant statistic, example, quote, story or study that will help the customer as they move through the buyer cycle.

PREPARE YOUR MENTAL STATE

Focus on the customer call and nothing else.