

Pre-Call Planning Worksheet Template

Sales Team Attendees	

Account	Date of Call

Client Characteristics

Contact Name	Role	Impact on This Deal (High, Medium, Low)	Met Before? (Yes/No)	Connected on LinkedIn? (Yes/No)	Nature of Existing Relationship (Friend, Neutral, Enemy)

Primary Issues and Concerns

Business Issues	
Relationship Issues	
Responsibilities	

What to Bring

Support Materials	Technical Support	Demo Capability Files	Reference Materials	Other

Call Goals

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Crucial Questions to Ask

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Crucial Questions to Anticipate

Common Buyer Objections	Best Possible Responses
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