

Call Planning Summary

NEXT PROSPECT MEETING

Research	1	Website
	2	LinkedIn
	3	Google
	4	
	5	

Meeting Objective	1	
	2	
	3	
	4	
	5	

Desired Outcome	1	
	2	
	3	
	4	
	5	

Core Message	1	
	2	
	3	
	4	
	5	

Meeting Structure	1	Introduction / Build Rapport
	2	Share Agenda or Plan for the meeting
	3	Your Company Value Proposition
	4	Ask Open Ended Questions
	5	Determine alignment to Desired Business Outcome (How can you help?)
	6	Align on Next Steps

Open Ended Questions	1	
	2	
	3	
	4	
	5	
	6	

Close for Next Steps	1	
	2	
	3	
	4	
	5	

CALL PLANNING

CALL EXECUTION