|  |  |
| --- | --- |
| COMPANY NAME: |  |
| SALES STAGE: |  |
| MEETING DATE: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| PARTICIPANTS | | | |
| Client Name | Role in Decision/Project | Communication Style | Relationship Strength |
|  |  |  |  |
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|  |  |  |  |

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Description automatically generated

Pre-Call Planner

| MEETING PURPOSE | |
| --- | --- |
| Client Why | Our Why |
|  |  |
|  |  |

| OUTCOMES / ACTIONS |
| --- |
|  |

| AGENDA |
| --- |
|  |

| KEY QUESTIONS TO ASK |
| --- |
|  |

| QUESTIONS THE CLIENT MAY ASK YOU | |
| --- | --- |
| Questions the Client May Ask You | Your Response |
|  |  |
|  |  |
|  |  |

| Warning with solid fill | CAUTION / RISK |
| --- | --- |
|  | |