

# SALES CALL PLANNING SHEET TEMPLATE



PROSPECT INFO	DETAILS	COMMENTS
ORGANIZATION NAME		
MAIN CONTACT		
CONTACT ROLE		
ADDITIONAL CONTACTS ON CALL		
ADDITIONAL CONTACTS ROLES		
POTENTIAL DEAL SIZE		
CURRENT PIPELINE STAGE		

## MEETING AGENDA

TIME	AGENDA ITEM	DESIRED OUTCOME

## OBJECTIVES

BEST CASE	
MOST LIKELY CASE	
WORST CASE	

## DISCUSSION KEYS

THEIR CURRENT PROBLEMS	
WHAT WE NEED TO KNOW	
WHAT TO FOCUS ON	
DESIRED NEXT ACTION	

## **DISCLAIMER**

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