

# Sales Call Agenda

Preparation and planning are key to a successful sales call. A written agenda for your sales meeting demonstrates your professionalism and organization to your prospect. Whether you are meeting one-on-one or both teams are meeting, once you develop a sales call checklist it can be adapted to use again and again to both increase your productivity and boost your sales.



- A written agenda is a checklist of what is important for you to cover in your sales call so you don't forget important steps in the client relationship process.

## Before The Meeting

- Confirm meeting time, purpose and participants in writing
- Research your prospect and identify how your product or service can solve their problem
- Create agenda
- Distribute agenda to key participants
- Distribute any needed support materials for the meeting

## During The Meeting

- Greet, Welcome and Thank: Introduce yourself, your company and any key players
  - Prospect introduces themselves, their company and any key players
  - Review meeting objective
  - Ask your prospect to explain their needs or business goals: why did they take the meeting?
  - Distribute any support materials
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- Present your information, facts or products
- Explain how your product or service can meet your prospect's needs (as identified above)
- Answer prospect questions and allow time for input from your prospect
- Ask what your prospects decision process is: key players, timing, logistics
- Define followup actions needed
- Schedule next meeting and/or next steps

### **After The Meeting**

- Followup in writing within 24 hours, thanking your prospect for the meeting and acknowledging your prospect's key questions and concerns
- Respond to all followup actions in a timely manner

**A successful sales call doesn't just happen. It requires planning, preparation and an agenda to help you stay focused and organized.**

**Download my free sales call agenda checklist to make sure you never forget an important step in the client relationship process.**

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