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 themself, 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

- [ ] 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.