

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
 - 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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