

Pre-Call Planning: _____

Meeting Information

Place: _____

Date: _____

Time: _____

- | | |
|---|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> What is the objective of the call? What do you want as an outcome of this meeting? <input type="checkbox"/> Have you reviewed the Survey of Questions to determine what you need to know and what you will ask? <input type="checkbox"/> Have you reviewed your files or your Account Plan? <input type="checkbox"/> Anticipate your clients potential objections or new questions they may ask and your answers. “ <i>What has changed if anything since our last meeting?</i>” <input type="checkbox"/> Role-Play your Opening. <input type="checkbox"/> Plan the sequence and roles of all participants, clients, outside parties and our company. | <ul style="list-style-type: none"> <input type="checkbox"/> Have you made sure every attending knows their role? <input type="checkbox"/> Review all previous notes and client information. Do you have their Organization Chart and company brochure? <input type="checkbox"/> What are the various personality styles of each participant? <input type="checkbox"/> Do you have the necessary brochures, data sheets, demo software with you? <input type="checkbox"/> <i>Have you checked your presentation material and equipment to make sure everything is working properly?</i> <input type="checkbox"/> Do you have plan on how you will close the meeting? What are the next steps? Action items, etc. “Leave something for them to do for you!” |
|---|---|

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Please Complete the Following document:

Objective of this Meeting, What is the Desired Outcome or Discussion:	Have Your Validated Pre-Calling Plan Guide?

Justification for this Encounter:

Expected Participants

Our Company Team	
Names	Titles

Desired Outcomes

Maximum	Minimum

Background Information

Meeting Logistics

Handouts
Other

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Meeting Event Planner

<i>Questions</i>	<i>Responses</i>

(Our) Internal Resource Requirements

Conclusions

<i>Information We Received</i>	<i>Information We Gave</i>

Agreed Upon Next Steps

<i>Our Company</i>	<i>Guest Team</i>

Additional Comments

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