salesOctane

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Pre-Call / Appointment Planning Form

"Don't have a plan…Stay in the car!"

SalesMap™ Step #	

Objectives for the Call / Appointment
1)
2)
3)
4)
5)

x	Pre-Call Checklist

Identify questions to uncover issues and meet the objectives of the call using any combination of the formats below:
Open-Ended *- Who, What, When, Where, Why, How and Which*
Alternate Choice *- "What sounds best…option A, B or C?" (no more than 3!!!)*
Assumptive *- "Let's do this...", "Let's meet again next..."*

Questions for the Call / Appointment	Aligns with Objective #
1)	
2)	
3)	
4)	
5)	

Confirm the NEXT Step(s) / Transition Statement