Call Checklist

Key Points

- Objectives will help you improve your performance over time
- Always be asking yourself
  "What do I need to do/have to move the sale forward?"

Pre-Call

Questions to consider before calling on a new prospect or an existing customer:

- ❑ What is my call objective(s) – only 1 or 2 SMART objectives?
- ❑ Who do I need to speak to in this business/division/department?
- ❑ Who is the key decision maker(s)?
- ❑ Who is a main influence(s)?
- ❑ What specific actions do you want the prospect to take at the end of the call?
- ❑ What potential obstacles exist that will threaten the sale?
- ❑ What stage am I at in the sales cycle?
- ❑ How will I open the call?
- ❑ What information do I have?
- ❑ What information do I need to find out?
- ❑ What sort of objections emerge out and how will I handle them?

Post Call

Questions to consider when reviewing your customer sales interaction:

- ❑ Did I achieve my objective?
- ❑ What went right/what went wrong?
- ❑ What does the customer think about me/my company/our offer?
- ❑ What information did I gather?
- ❑ What evidence do I have that this is still a viable sales opportunity?
- ❑ Did I advance the sale to the next stage?
- ❑ Who else needs to be involved in the process?
- ❑ What else do I need to do to progress the sale to the next stage?
- ❑ When am I next going to see or speak to this customer?
- ❑ What will be my next call objective?