Worksheet: Pre-Call Planning

Pre-Call Planning Checklist Practice Guide

Overview

Pre-call planning varies a lot from company to company. If you are selling a 100 million dollar networking hardware system to a Fortune 100 company, you're obviously going to need a lot more pre call planning than one of 7 sales calls you're going through on a given day to sell local printing services. We deal with a lot of different clients in the SalesGym and, in general, the higher velocity or more people you see per week has a lot to do with how much pre call planning you can do on any given call. We'll give you a couple of different approaches to consider:

The Full Compete Selling Pre-Call Checklist

- ❑ Making sure you know who will be in the meeting, especially anyone you haven't met before
- ❑ Do some research on new people you're meeting via LinkedIn, the company's website and other research sources
- ❑ Get your invites and confirmation of the agenda for the meeting out in advance, if possible
- ❑ Refresh your memory on any personal details of people in the meeting you've met before…where they're from, where they went to college, hobbies, favorite teams, etc.
- ❑ Identify the specific outcomes you are going for in this meeting. It's best to have a stretch outcome and a fallback if the stretch outcome becomes unobtainable
- ❑ If summarizing a previous meeting, put your notes together for that
- ❑ Identify 3-5 (minimum) questions you want to ask
- ❑ Determine the 2-3 questions you would like to be asked. We'll go into why this is so important in a future chapter.
- ❑ Determine techniques you'll use to introduce more provocative questions so it's done positively. We'll cover this in a future chapter
- ❑ Think through how to make your proposals, ideas, fact sheets, etc. more interesting using more customer-focused language
- ❑ Carefully think through how you can use technology in the meeting and make sure it's absolutely bullet proof
- ❑ Determine what objective, 3rd party evidence you can use to reinforce the new thinking you are presenting
- ❑ Prepare your success stories that highlight a decision maker that made the decision you are hoping to achieve as your outcomes
- ❑ Practice and rehearse! Unfortunately, too often this is neglected
- ❑ Updating your CRM, presentation materials, powerpoint slides and proposals

A Simple Effective, 5-Step Pre-Call Routine

A lot of salespeople we work with in the SalesGym tell us they really like this stripped down, 5-step pre call planning routine:

1. Review the names and any personal details you should know of the people you'll be meeting with
2. Prepare your stretch and fallback outcomes along with success story recommendations
3. Prepare the 3-5 questions you MUST ask in this meeting and, if they're assertive, how will you set them up to lower resistance
4. Think through the 2-3 questions you would like to be asked so you can introduce those questions yourself
5. Prepare your agenda for the meeting