

## Sales Call Checklist

Account \_\_\_\_\_

Contact \_\_\_\_\_

1. Planning
  - a. Do you have a clear objective? What is it?
  - b. Do you have all of the information you need about this account, including information about your prospects personality? How will you use it?
  - c. Do you have a clear strategy? What is it?
  
2. Opening
  - a. How will you identify yourself and your firm?
  - b. How will you establish rapport?
  - c. What will your interest-creating statement be?
  - d. How will you respond to a stall/put off?
  
3. Diagnosing
  - a. Have you discovered and how will you communicate your understanding of this prospects needs? What are they?
  - b. Do you have all of the information you need to make an accurate diagnosis?
  - c. How will you react if your prospect doesn't agree with your diagnosis?
  
4. Presenting
  - a. How will you summarize your prospects needs?
  - b. How will you clearly show your proposal will solve the prospects needs?
  - c. How will you focus on needs and benefits rather than product features?
  - d. What benefits will most likely solve those needs?
  
5. Handling Objections
  - a. What objections do you expect to encounter? Write them down...now!
  - b. How will you handle these objections?
  - c. How will you cushion those objections (I understand or I can appreciate) and then go back to selling?
  - d. How will you answer the question "What can you do for me on price?" Write it down...now. How will you handle other price discussions?
  
6. Closing
  - a. What closing techniques will you use (one of the 7)?
  - b. Do you recognize buying signals? List them and your answers to those buying signals.

- c. What trial closes will you use? (Ask for an opinion)
  - d. What follow up standard closing questions will you ask? ( Ask for a decision.)
7. Writing the Order
- a. Will you need a purchase order number?
  - b. Did you confirm the details with the customer?
  - c. What details will be needed to complete this process?
  - d. Will you try for additional business or shut up and courteously leave?
8. Post Call Analysis
- a. How satisfied are you with your performance on this call?
  - b. Did you achieve your call objectives?
  - c. Was the sale made or lost?
  - d. What would/should you do differently next time you contact this person?
  - e. How can the results of this call help you in the future?
9. Planning your next contact
- a. What action do you take next?
  - b. What action is the customer going to take next?
  - c. Next Call Date?

Now, enter into your call report/planning book all of the important information from this call while it is fresh in your mind.