**Sales Call Planner**

**Prospect Info**

|  |  |  |
| --- | --- | --- |
| **Info Classification** | **Info** | **Notes** |
| **Organization Name** |  |  |
| **Main Contact Name** |  |  |
| **Main Contact Role** |  |  |
| **Other Contacts on the Call** |  |  |
| **Other Contacts Roles** |  |  |
| **Potential Deal Size** |  |  |
| **Current Pipeline Stage** |  |  |

**Objectives**

|  |  |  |
| --- | --- | --- |
| **Best Case** | **Most Likely Case** | **Worst Case** |
|  |  |  |

**Meeting Agenda**

|  |  |  |
| --- | --- | --- |
| **Time** | **Agenda Item** | **Desired Outcome** |
|  |  |  |
|  |  |  |
|  |  |  |

**Discussion Keys**

|  |  |
| --- | --- |
| **Focus** | **Our Description** |
| **Their Current Problems** |  |
| **What We Need to Learn?** |  |
| **Topics To Focus On** |  |
| **Desired Next Action** |  |