

CALL PLANNING TOOL

Preliminary Planning Worksheet

Use this worksheet to help you plan the content and strategy of your sales calls

**Decision-
maker name:**

**Target
Company:**

Objectives

If your call is a success what will be the immediate results?

Main Messages

What must the prospect understand and remember from your call?

1.

2.

3.

4.

5.

Supporting Facts

What facts/testimonials/case-studies/research supports your main message?

Message 1

Message 2

Message 3

Message 4

Message 5

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ACTIVITY:

Now share your strategy with a partner for feedback. What's effective? What could be better? What actions do you want a prospect to take away from a call? How will you create a sense of urgency?