Developing a Call Plan

Developing a call plan produces more productive meetings with customers and prospects. Take the time to prepare properly for every customer interaction. These “moments of truth” with the customer will paint a customer perception of you and your company over time.

Customer Name:		**Meeting Date:**	
Meeting Location:		**Meeting Time:**	
Client Attendees:		**Your Attendees:**	
Opportunity:		**Sales Phase:**	

Meeting agenda

List the agenda topics and who will be responsible for leading the discussion in each area.

Be sure the agenda aligns with the purpose and objectives below.

Summary of the Customer and Opportunity

What is the size of the customer? Nature of their business?

What is our current status with the client?

Are there any follow up action items from previous meetings that we will discuss?

Meeting purpose and objectives

What are the objectives for the meeting?

What is the customer expecting as an outcome?

What do you want to accomplish in this meeting?

Value you and your team will deliver

What value are you and your team bringing to this meeting (information, insights, designs, etc)

Were there any deliverables promised to the customer during a previous meeting?

Specific action you want the customer to take after this meeting

Internal referral or support on a current proposal?

An introduction to someone else?

Approval on a contract or proposal?

Questions or objections the client may have

It is imperative that you prepare for potential questions or objections that the customer may raise during the conversation. Overcoming objections and gaining credibility is accomplished through accurate and immediate responses delivered with conviction and confidence.

Questions to ask the client / information that you need

Utilize open ended questions as much as possible.

What questions do you want to ask to achieve our objectives?

What information is needed?

Action Items and Next Steps	Due Date