



CALL PLANNING WORKSHEET

Organization		Contact	
Stage of Customer Buying-Decision Process		Date	

Background

Information Collected from CRM/D&B, Definitive Healthcare, LinkedIn, Client website, other sources	
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Goal

Primary Goal – The best commitment to action you expect the client to make as a result of your meeting.	
Secondary Goal – The least commitment to action you can get from the client to keep the sales process moving forward	

Introduction/Pitch

Valid Business Reason What is your “grabber” pitch? Statements to avoid making a client think, “who cares?” <u>FROM CLIENT POINT OF VIEW</u>	
Benefits Statement State how client personally wins by working with you.	
Suggested agenda	
Response check	

Fact Finding

Situation questions ENTER your questions here	
Insight questions ENTER your questions here	
Gap questions ENTER your questions here	
Needs/solution questions ENTER your questions here	
Summarize Client GAP or needs	

Selling Value

Recommend Assessment or Solution By now you should have asked the right questions, and demonstrated the gap that brings the individual to recognition of needs. <i>Prescription before diagnosis = Malpractice</i>	
Describe the Impact Your job is to make the gap become real for them. Therefore, you must recognize the importance of planning these statements so they have maximum impact	
Response Check	

Anticipated Objections

Likely objections	
Steps to overcome using: Listen Acknowledge Explore Respond	

Gaining Commitment

Summarize your value	
Summarize agreements	
Suggest next steps	
Response check	