Sales Preparation Report

Prepared By: [Your Name]
Date: [MM/DD/YYYY]
Client/Target: [Client Name or Company]
Salesperson/Team: [Salesperson Name or Team]

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1. Client Overview

- **Company Name:**
- **Industry:**
- **Location:**
- **Company Size:**
- **Key Contacts:** [Name, Role, Contact Info]
- **Recent News / Events:** [Relevant updates about the company]

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2. Sales Objectives

- **Primary Goal:** [e.g., Close deal, Schedule demo, Upsell]
- **Secondary Goals:** [Optional additional goals]
- **Key Metrics / Targets:** [e.g., Revenue, Units, Conversion Rate]

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3. Client Needs & Pain Points

- [List identified problems, needs, or opportunities the client has]

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4. Product / Service Alignment

- **Relevant Products/Services:**
- **Value Proposition:** [How your solution addresses their needs]
- **Differentiators:** [What sets your solution apart from competitors]

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5. Competitive Analysis

- **Competitors:** [List main competitors for this client]
- **Competitor Strengths:**
- **Competitor Weaknesses:**
- **Our Advantage:**

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6. Sales Strategy & Approach

- **Engagement Plan:** [Email, Call, Meeting, Demo, Presentation]
- **Key Messaging Points:** [3–5 points to emphasize in communication]
- **Objection Handling:** [Anticipated objections & responses]
- **Follow-Up Plan:** [Timeline for next steps]

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7. Estimated Timeline

Stage	Action	Responsible	Deadline
[e.g., Initial Contact]	[Action]	[Name]	[Date]
[e.g., Demo / Presentation]	[Action]	[Name]	[Date]
[e.g., Proposal Submission]	[Action]	[Name]	[Date]

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8. Additional Notes / Insights

- [Any other insights, context, or reminders for the sales team]