

# SALES PRE-CALL PLANNING TEMPLATE

## PROSPECT INFORMATION

Prospect name	
Company name	
Job title	
Contact information (phone/email)	
Industry	
Competitors	
Connected on LinkedIn (yes/no)	
Met before (yes/no)	
Impact on the deal (high/medium/low)	

## CALL LOGISTICS

Date and time of the call	
Agenda and topics to be covered	
Call duration (approximate)	

## GOAL FOR THE CALL

Primary objective (e.g. schedule follow-up, close the deal, gather information)	
Secondary objectives (if any)	

## RESEARCH

Key insights from social media profiles	
Company background and history	
Recent company/industry developments	
Current challenges and goals	
Existing tech stack	
Competitor information	

## SUPPORT MATERIAL REQUIREMENT

Case studies	
Product documentation	
Demo capability files	
Pricing and proposal information	
Reference material	
Customized resources	

## IMPORTANT QUESTIONS TO ASK

Industry and company-specific questions	
Challenges and pain point questions	
Competitive landscape questions	
Current solution and satisfaction questions	

## COMMON OBJECTIONS AND RESPONSES

Pricing	
Timing	
Competition	

## ADDITIONAL NOTES

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