

FEEL GOOD ABOUT SELLING - PRE-CALL PLANNING CHECKLIST

Pre-call planning is key to great conversations. It allows you to gather information to understand your prospect's story, and how to best position your services to help them.

Use and adapt this guide to help prepare for your sales conversations. This prep work will show that you've done your homework, that you care about your prospect's world, and that you are a valuable resource.

About the individual(s)

- ☐ Title/role
- ☐ Location
- ☐ Length at current company
- ☐ Anything notable or newsworthy (blogs, press mentions)
- ☐ Explore LinkedIn profile (career track, experience)
- ☐ Explore company website (our team page)

About the company

- ☐ What do they do (industry) - what problem do they solve
- ☐ Company website (about us page, their mission, careers page)
- ☐ What do they care about
- ☐ Press mentions
- ☐ Glassdoor rating
- ☐ Company LinkedIn page
- ☐ Estimated headcount at company

What's their story

Reflect on what you think they are going through. What progress do you think they need to make, and how might you be able to help with your services?

Typically, companies are in one of five phases: Startup, Growth, Maturing, Decline, and Revival. Knowing where a company is can help you understand their situation more clearly:

1. Startup: New, fast-moving, lots of change and chaos - exciting times
2. Growing: Booming, moving fast, and concerned about all the change and impact on culture
3. Maturing: Things are slowing down, less frantic, trying to avoid shrinking profit margins
4. Decline: Low sales, short on cash, losing to competitors
5. Revival: Trying to reinvent themselves, new products/services, new approach

Notes