



Pre-call planning

Company Name: Telephone No:

Contact Name: Source of Lead:

Why?

What's the reason you're talking in the first place?

Objectives?

What you plan to achieve within the conversation?

Premise?

What do you know about your prospect's situation?

Plan?

How do you plan to reach the objectives?

Anticipate?

What could go wrong and if it does, how do you react to it?