

Fifteen minutes. If an item takes more than three, write "unknown" and move on. Unknowns become good questions.

# Sales Call Prep Checklist

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## THE COMPANY

- ☐ **What they sell, and to whom.** One sentence, your own words.
- ☐ **Size and stage.** Headcount, funding or public, growing or shrinking.
- ☐ **What changed recently.** Funding, executive hire, launch, layoff, acquisition. Your "why now."
- ☐ **Who they compete with.** Two or three names.
- ☐ **What they're probably measured on.** Revenue, pipeline, retention, cost, speed. Pick the one you move.

## THE PERSON

- ☐ **Role and scope.** What they actually own, not just the title.
- ☐ **Tenure and path.** New means new priorities. Long means attached to the status quo.
- ☐ **What they've said publicly.** One genuine reference beats five generic ones.
- ☐ **Common ground.** School, employer, city, mutual connection. Your opening line.

## THE FIT

- ☐ **The trigger.** Which recent change connects to what you sell? None means nurture, not call.
- ☐ **The likely objection.** Budget, timing, incumbent, "we do it in-house." Write the one you'd raise.
- ☐ **The lookalike customer.** Your proof point.
- ☐ **Methodology fields.** MEDDIC, SPIN, Challenger, BANT, Sandler: fill what you know, leave blanks as questions.

## THE TALKING POINTS    the only part the prospect sees

- ☐ **Opening line.** From common ground or the trigger. Not "how's your week going."
- ☐ **Three talking points.** Each ties something about them to something you do.
- ☐ **One question research can't answer.** Ask it early. It proves you did the work.
- ☐ **One proof point.** The lookalike, with a number if you have one.
- ☐ **The ask.** Next meeting, trial, intro to the economic buyer. Decide before you dial.

## AFTER THE CALL    thirty seconds

- ☐ **Which items were wrong?** That's how the next prep gets sharper.

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