|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Rep Name** |  |  | **Date of call** |  |
| **Rep Tenure (years)** |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Account Name** |  |  | **Person Met?** |  |
| **Prospect or Client?** |  |  | **Role of Person** |  |
| **Opportunity Size** |  |  | **Meeting Number** |  |

|  |  |  |
| --- | --- | --- |
| **Pre Call Planning (Did the rep…)** | **Yes** | **No** |
| Use/create a documented Call Plan? |  |  |
| Prepare a Call Plan with specific objectives and outcomes? |  |  |
| Review the Call Plan with their manager beforehand? |  |  |
| Prepare questions for the meeting and develop a compelling agenda? |  |  |
| Possess insightful information on the key decision maker and the business? |  |  |
| Capture/articulate the customer’s value proposition and/or business challenge? |  |  |

|  |  |  |
| --- | --- | --- |
| **Call Execution (did the rep….)** | **Yes** | **No** |
| Use the approved sales process relative to the sales campaign stage? |  |  |
| Set a tight agenda for the meeting and how time would be spent? |  |  |
| Ask the prospect what they would like to accomplish? |  |  |
| Prepare the economic buyer for the meeting? |  |  |
| Ask key situational questions for information missing from the Call Plan? |  |  |
| Recap current problems identified from prior calls? |  |  |
| Identify current problems with current method? |  |  |
| Explore the impact of problems with or challenges to the client’s business? |  |  |
| Use open-ended questions throughout the discovery process? |  |  |
| Identify the pain for multiple stakeholders? |  |  |
| Move from implicit to explicit needs? |  |  |
| Quantify future potential impact to the business? |  |  |
| Convey credibility throughout the call? |  |  |
| Close for next steps? |  |  |

|  |
| --- |
| **What are next steps?** |
| **Describe the Account Executives Relationship w/the contact:** |
| **Any buyer steps, evaluation or exit criteria exhibited?** |
| **What job aids, resources, forms, etc were used?** |
| **Notes:** |

