Sales Call Checklist

By Campbell Rodriguez

- [ ] Preparation
  - [ ] Research the account prior to the call.
  - [ ] Learn something about the person and their business.
  - [ ] Have three value-added points prepared.
- [ ] Introduction
  - [ ] Find out the names of contacts in the account.
  - [ ] Find out who the decision-makers are.
  - [ ] Bridge to the business topic smoothly.
- [ ] Sales Call
  - [ ] Spend 80 percent of your time listening and only 20 percent talking.
  - [ ] Ask about the business goals.
  - [ ] Ask what challenges the company is facing.
  - [ ] Find out how and why they made the decision for their current product or service.
  - [ ] Ask if they could change something about their product or service, what would it be.
  - [ ] Talk about benefits.
  - [ ] Give a general overview of the product or service.
  - [ ] Stay focused on the customer's needs.
  - [ ] Summarize the prospect's needs and how our product or service meets those needs.
- [ ] Closing
  - [ ] Get the customer to identify all possible problems that might be solved by the product or service.
  - [ ] Get the customer to identify the value of solving the identified problems.
  - [ ] Ask for the order.