

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.