Sales Checklist

By Campbell Rodriguez

- ☐ Sales Planning
  - ☐ Garther information about caller and company background.
  - ☐ Research what prospect wants to accomplish.
  - ☐ List prospect contacts who will be involved in decision making process.
  - ☐ Initiate contact: 'sell the meeting'.
- ☐ Before Interview with Prospect
  - ☐ Look for additional information such as in trade magazine articles.
  - ☐ Call referral source to thank and gain information about "lead".
  - ☐ Use additional "network" contacts and other relationships.
  - ☐ Find other people who might know about the company.
  - ☐ Find industry contacts to give background information.
  - ☐ Gather samples of our work.
  - ☐ Prepare reference list including names and phone.
  - ☐ Prepare written material as necessary such as business cards or brochures.
  - ☐ "Role-play" the discussion with another partner.
  - ☐ Determine what prospect wants to accomplish as a result of using your firm's services.
  - ☐ Determine what benefits might be of interest to the prospect and shape your firm's services.
  - ☐ Develop responces to objections.
  - ☐ Send a confirmation of the meeting.
  - ☐ Make sure to get to meeting on time.
- ☐ Interview with Prospect
  - ☐ Get ideas for small talk.
  - ☐ Prepare transition including thanking prospect, expressing interest in working with them and stating the purpose of the meeting.
  - ☐ Keep a positive attitude.
  - ☐ List three things that differentiate you and your message in a positive way from your competition.
  - ☐ List three reasons that explain why you're unique.

- [ ] End with a question or statement that will either close the deal or move the sale along in the right direction.