Sales Call Checklist

Created: 1/2/2012

# Tasks:

☐ **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.**