Sales Checklist

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# Tasks:

☐ **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.**