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.
	\Box	Ask for the order