

THE COMPLETE SALES CALL PREP CHECKLIST

REVIEW

RESEARCH

PLANNING

10 STEPS

REVIEW

1 REVIEW ACCOUNT HISTORY

Check your CRM for existing relationships or prior history with this account.

2 CHECK FOR RECENT ACTIVITY

Use your CRM and Sales Engagement tools to surface any recent interactions or sales touches.

RESEARCH

3 IDENTIFY COMPETITORS

Research their industry and largest competitors. Are any of those competitors already your customers?

4 COMPANY NEWS

Scan news articles and press releases for major updates, initiatives, hires, or changes.

5 COMPANY ORGANIZATION

Use LinkedIn or their website to understand company structure, team, and reporting lines.

6 FIND CONNECTIONS

Use LinkedIn to identify shared connections you may have with the person you're calling.

PLANNING

7 SET THE AGENDA

Create a call agenda to stay organized. Consider sending it to the prospect before the call.

8 PLAN YOUR DISCOVERY

Write down three questions based on your research that can uncover their business need.

9 ORGANIZE YOUR RESOURCES

If presenting a deck or demo, confirm everything is working and easy to access.

10 DECIDE ON NEXT STEPS

Go into the call knowing the outcome you want. What next steps will you close with?