# Placeholder 1

[Company Name]

## Sales Call Checklist

Version 0.0

[Date published]

Presented by:

[Presenter's name]

## Sales Call Checklist

|  |
| --- |
| Account details |
| Account name | Project or opportunity | Phone number |
| Coho Vineyard | Provide plastic sampling cups for vineyard tours | (789) 555-0134 |
| Location | Primary contact | Call date |
| San Armando, CA | Sharon Salavaria | Tuesday, July 27, 2008 |
| Account executive | Business development director | Call time |
| Marc Faeber | Kim Abercrombie | 2:00 P.M. |
| Call purpose and expected outcome |
| Secure an order for plastic sampling cups. Customer needs 500,000 per quarter. Our goal is to get a commitment for next quarter's order, which will be delivered before August 10, 2008. |
| Customer participants(name, title, role) | Our company participants(name, title, role) |
| Sharon Salavaria, buyerChris Cannon, VP | Marc Faeber, account executiveKim Abercrombie, director |
| Planned agenda (include our business value and client industry issues) |
| 1. Introductions
2. Objectives
3. Product overview
4. Capabilities
 | 1. Samples and demonstrations
2. Question and answer
3. Next steps
 |
| Competitive issues and obstacles | Required resources and advance preparation |
| Current vendor has established strong relationship.Chris Cannon is hard to get to know. | Need samples for the call.Take invitation to company golf invitational.Make sure brochures are back from the printer. |

## Sales Call Checklist

|  |
| --- |
| Account details |
| Account name | Project or opportunity | Phone number |
|  |  |  |
| Location | Primary contact | Call date |
|  |  |  |
| Account executive | Business development director | Call time |
|  |  |  |
| Call purpose and expected outcome |
|  |
| Customer participants(name, title, role) | Our company participants(name, title, role) |
|  |  |
| Planned agenda (include our business value and client industry issues) |
|  |
| Competitive issues and obstacles | Required resources and advance preparation |
|  |  |