# 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, buyer  Chris Cannon, VP | | Marc Faeber, account executive  Kim 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. | |

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