Pre-Call Planning Work Sheet –

THE SELLING AGENCY

Who am I calling? (What is their position, business? What do I know about them?)

Why am I calling? (Clear and transparent, "no fluff")

Why should they care? (Do I have references, referrals, results to offer?)

What's in it for them? (Insight, information, introductions, answers, customization)

What am I asking them to buy at this moment? (Think small bites – incremental decision making)

**Receive our email*
**Phone call to discuss value and needs*
**Shared information about their operations*
**Expertise as someone who can solve their problems*
**Opportunity to discuss a hard proposal*
**The solution*

What would their objections be? (See – Risks above and what is my response)

**Receive our email (risk – giving contact information and spamming me)*
**Phone call to discuss value and needs (risk – wasting my time and hard selling me)*
**Shared information about their operations (risk – waste time, misuse of info)*
**Expertise as someone who can solve their problems (risk – not qualified, don't understand me, waste my time)*
**Opportunity to discuss a hard proposal (risk – sold when not ready to make a decision)*
**The solution (not ready, not fully capable of executing or implementing, don't have the cash flow)*

What are the next steps? (Hint, see above)

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