

SCHEDULING THE DEMO Worksheets

WHO IS ATTENDING THE MEETING

Prospect's side



Use this worksheet to determine who is attending the meeting from the customer/prospect's team and plan what resources you need to have in place for them.

WHO IS ATTENDING	RESOURCES I NEED TO HAVE IN PLACE

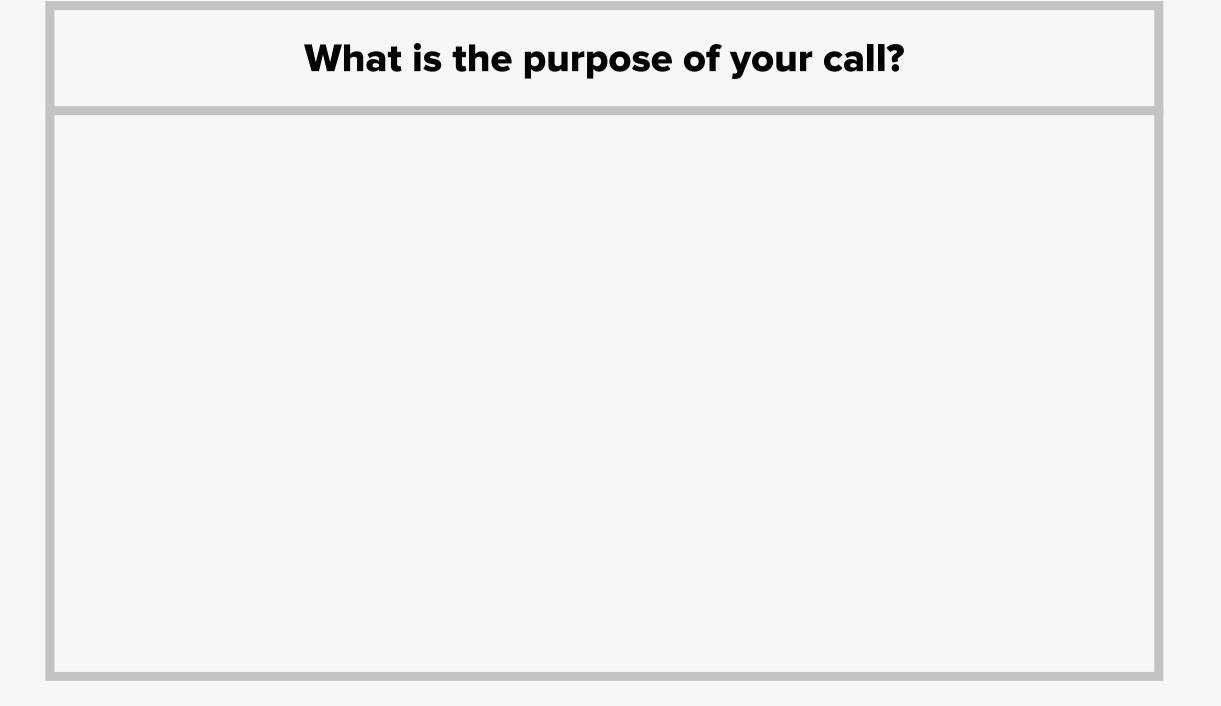


WHO IS ATTENDING THE MEETING

Your side



Use this worksheet to determine who from your team needs to be part of your next call so that you don't include too many people and/or you don't invite people who don't need to be there.





WHO IS ATTENDING FROM THEIR TEAM?	WHO NEEDS TO ATTEND FROM OUR TEAM?	WHY DO THEY NEED TO BE THERE?

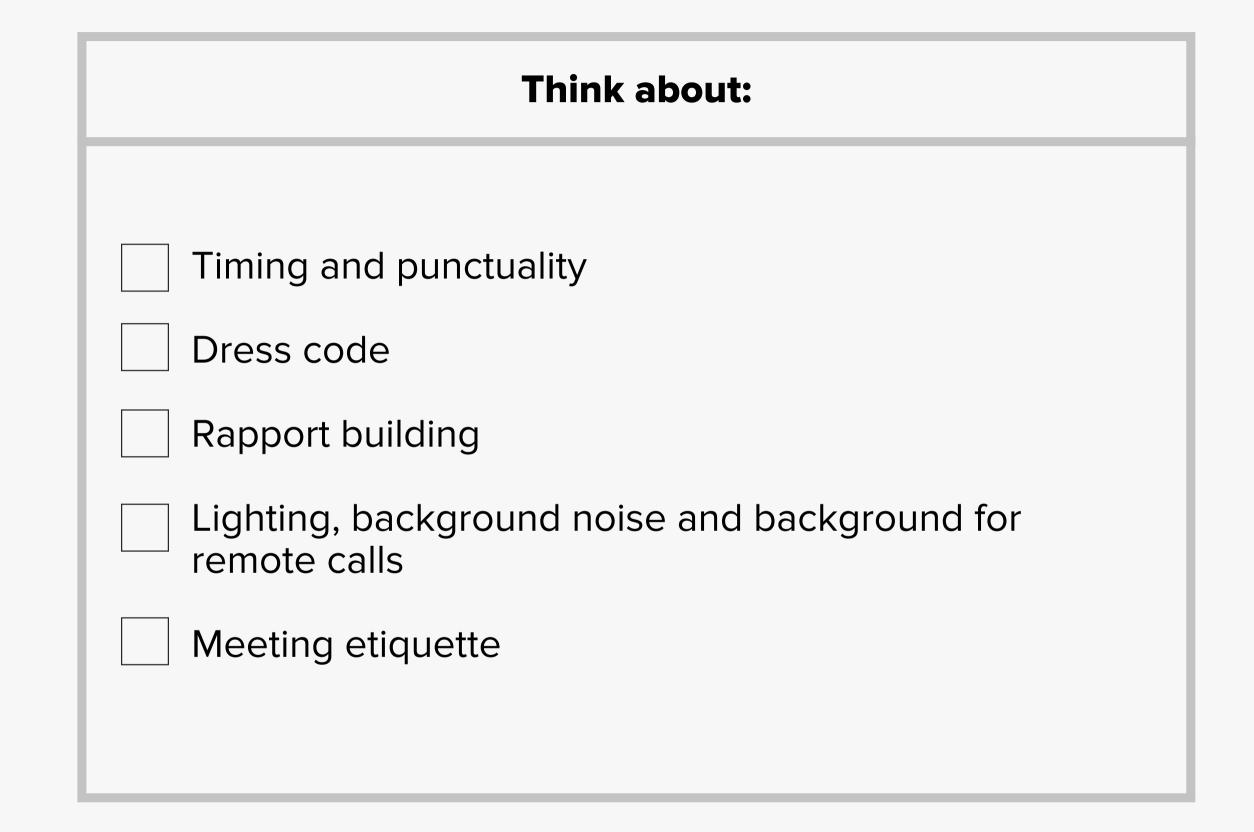


WHAT SHOULD YOU DO?



Use this worksheet to help you set the tone with your team and assign roles for success so that you work together seamlessly to close the deal.

What are your best tips for how to show up and wow a customer on a sales call?





WHO NEEDS TO ATTEND	HOW DO YOU WANT THEM TO INTERACT WITH YOUR PROSPECT	WHAT DO THEY NEED TO COME PREPARED WITH



PRE-GAME CALL CHECKLIST



Use this worksheet to plan out your pre-game call.

What are you going to cover during this time?		
What is the objective of the call?		
Why are they part of it?		
When do they need to converse with the prospect and about what?		
What resources do they need to bring?		
When and where will the call be held, and for how long?		
When:		
Where:		
Duration:		



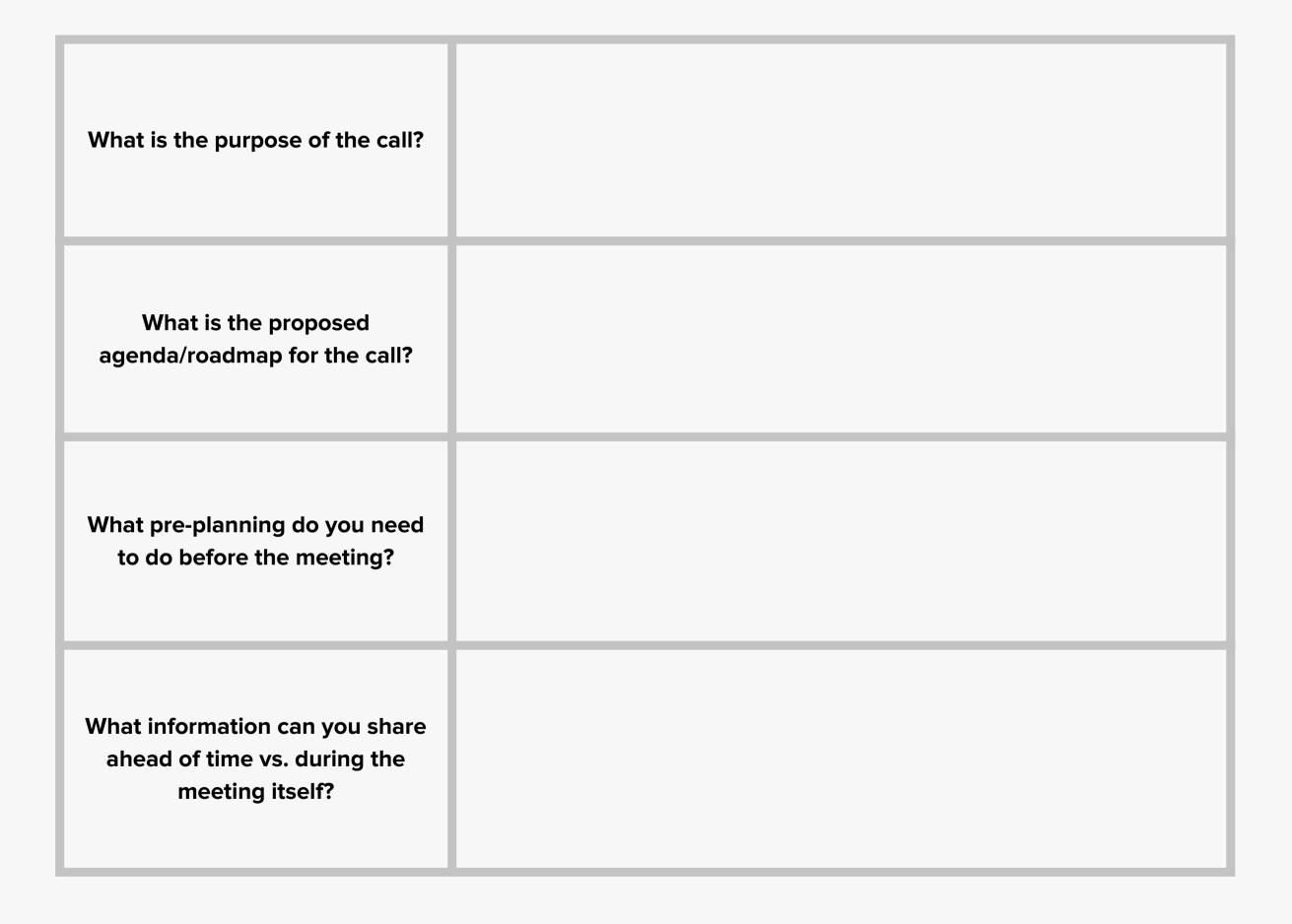
PERSON	THEIR ROLE IN THE MEETING	WHAT WILL THEY BE EXPECTED TO TALK ABOUT AND WHEN	RESOURCE THEY MIGHT WANT TO BRING WITH THEM



PROPOSED AGENDA CHECKLIST



Use this worksheet to work through the process of crafting and sharing a proposed agenda with your prospect BEFORE your call.



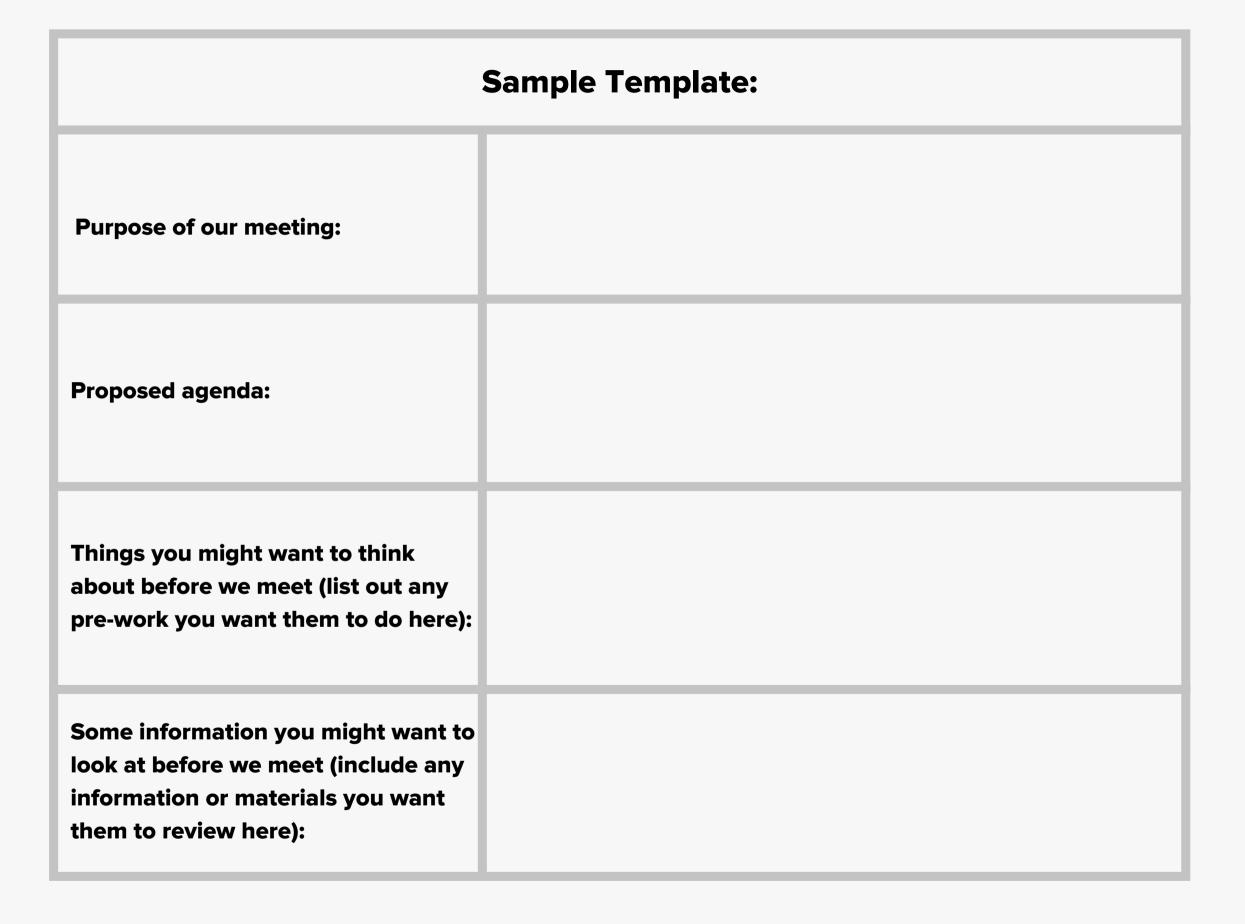


Use this worksheet to work through the process of crafting and sharing a proposed agenda with your prospect BEFORE your call.

How will you share this information with them?		
Calendar Request		
Email		
Other		
When will you share this information by		
When will you share this information by?		
How will you follow up to ensure they've received it and to answer any questions they may have?		
And by when?		



Use this worksheet to create a template for yourself to follow when scheduling a meeting with your prospect.





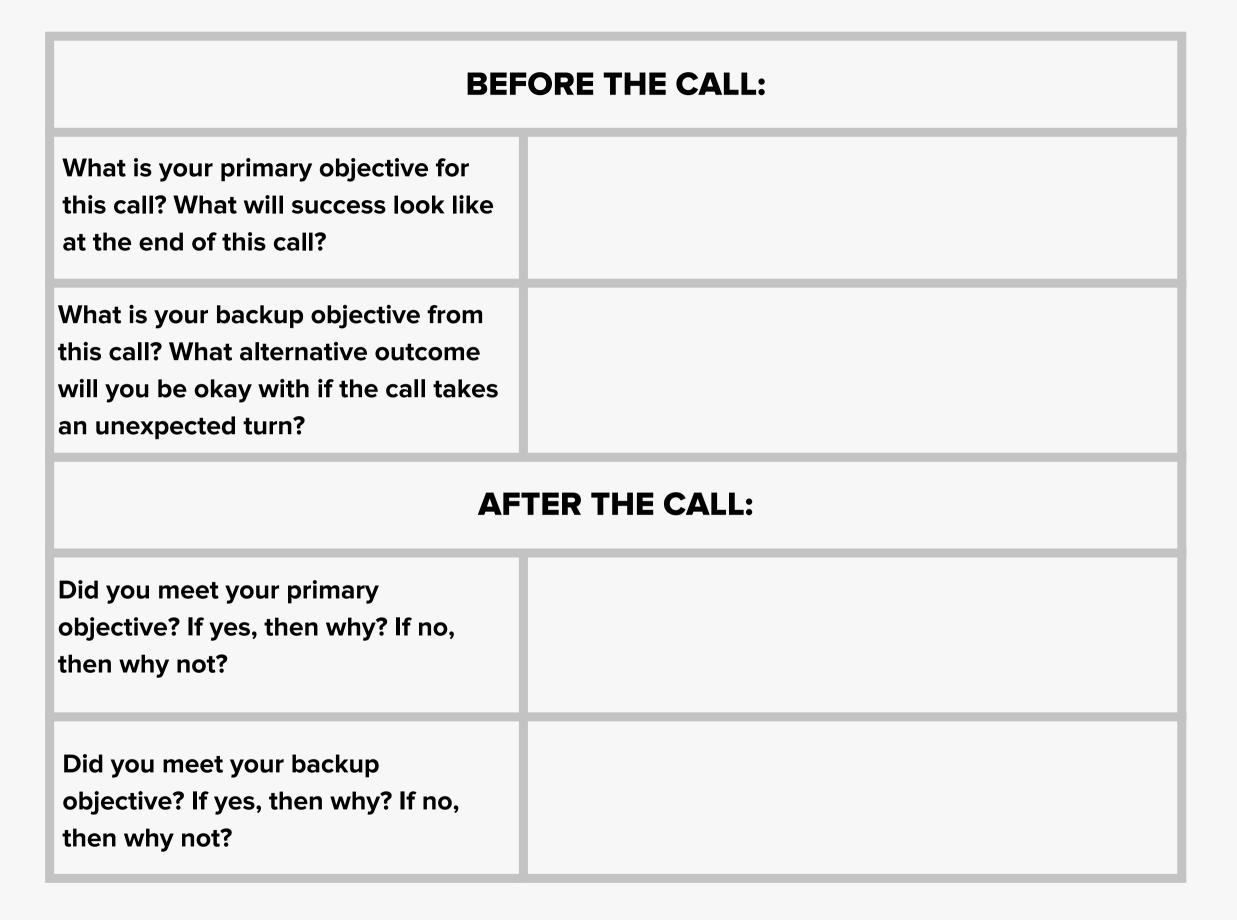
Sample Follow Up Template: Sample Checklis Hey <insert name>, Send meeting purpose I'm looking forward to meeting with you and the team on <insert date>. Send proposed agenda I wanted to make sure you got my email/calendar invite dated <insert date>; Send questions for the prospect to think about with the meeting purpose, proposed agenda, and additional resources. Send materials for the prospect to review Please let me know if you had any Follow up on email/calendar invite questions or comments about that. Speak soon, <insert your name>.



SETTING PRIMARY OBJECTIVE

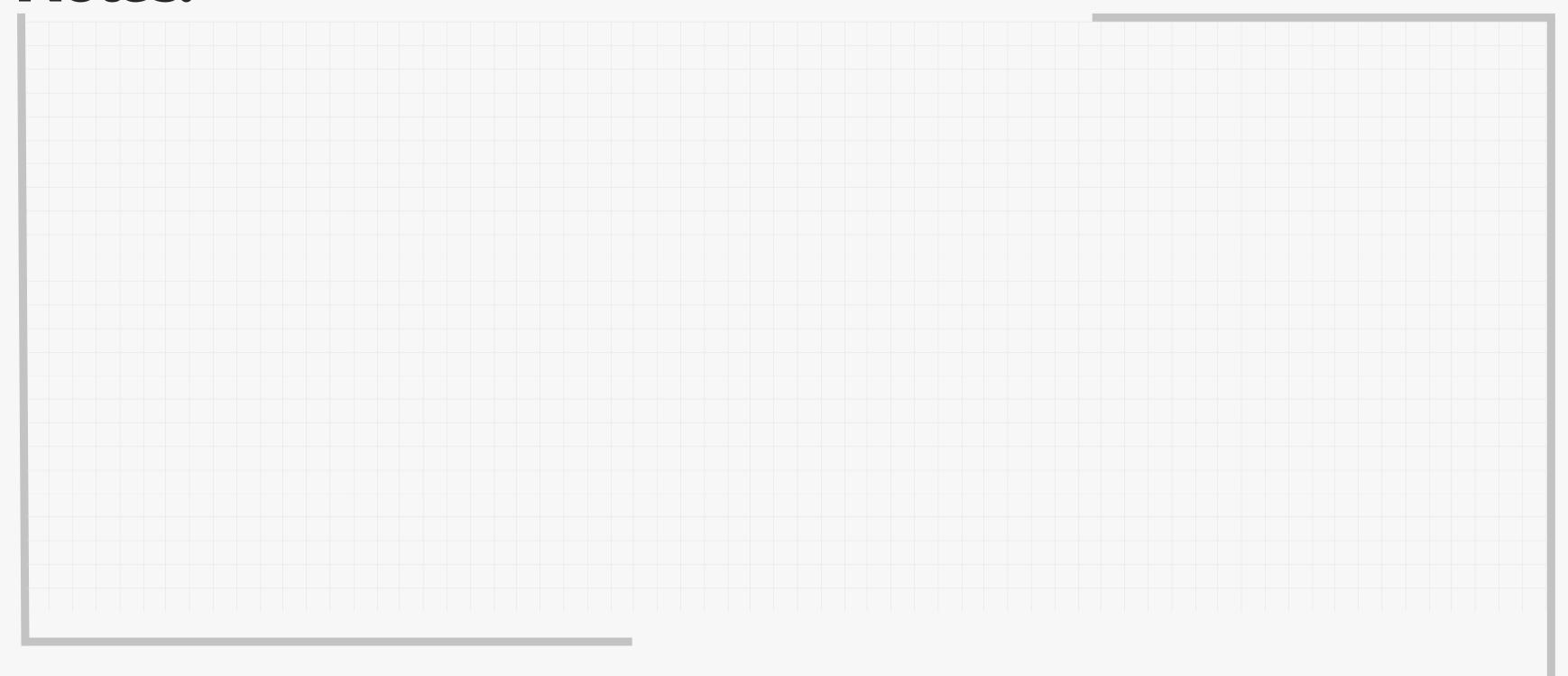


We recommend spending a few minutes before and after every sales call thinking about your primary and secondary objectives.





Notes:







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