



SCHEDULING THE DEMO

Worksheets

[Click here to go to the article with details on how to use this worksheet.](#)

WHO IS ATTENDING THE MEETING

Prospect's side

Instructions:

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

Instructions:

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.

What is the purpose of your call?

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



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WHAT SHOULD YOU DO?

Instructions:

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?

Think about:

- Timing and punctuality
- Dress code
- Rapport building
- Lighting, background noise and background for remote calls
- Meeting etiquette

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



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PRE-GAME CALL CHECKLIST

Instructions:

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

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



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



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PROPOSED AGENDA CHECKLIST

Instructions:

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

<p>What is the purpose of the call?</p>	
<p>What is the proposed agenda/roadmap for the call?</p>	
<p>What pre-planning do you need to do before the meeting?</p>	
<p>What information can you share ahead of time vs. during the meeting itself?</p>	



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Instructions:

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?	
<input type="checkbox"/> Calendar Request	
<input type="checkbox"/> Email	
<input type="checkbox"/> 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?	

Instructions:

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

Sample Template:	
Purpose of our meeting:	
Proposed agenda:	
Things you might want to think about before we meet (list out any pre-work you want them to do here):	
Some information you might want to look at before we meet (include any information or materials you want them to review here):	



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Sample Follow Up Template:

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

Sample Checklis

- Send meeting purpose
- Send proposed agenda
- Send questions for the prospect to think about
- Send materials for the prospect to review
- Follow up on email/calendar invite

SETTING PRIMARY OBJECTIVE

Instructions:

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

BEFORE THE CALL:	
What is your primary objective for this call? What will success look like at the end of this call?	
What is your backup objective from this call? What alternative outcome will you be okay with if the call takes an unexpected turn?	
AFTER THE CALL:	
Did you meet your primary objective? If yes, then why? If no, then why not?	
Did you meet your backup objective? If yes, then why? If no, then why not?	



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Notes:

A large rectangular area filled with a light grey grid pattern, intended for writing notes. The grid is bounded by a thick grey border that is slightly offset from the grid lines.



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