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DEMO ARRANGEMENT
Worksheets

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

VIDEO CHECKLIST

Instructions:

Use this worksheet to plan how to strategically use video as part of your sales calls.

Think back to your last three sales calls. Were they video calls?	**If yes, did you have your video turned on?**
☐ Yes ☐ No	☐ Yes ☐ No
If not, why didn't you have it turned on?	

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Which of these elements would you like MORE of on your call with a prospect?	How You Can Get Your Prospect to Turn Their Video On?	How can you make it clear that this will be a video call?
☐ More connection and rapport ☐ More understanding and comprehension ☐ More attention		

What will you say in order to subtly remind and encourage your prospect to turn their video on?	Are there any situations or reasons where you might consider keeping your video off?	How might you overcome the reasons for not switching your video on?
Ex.“Hey, can you see me?		

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BOOKING ADDITIONAL TIME

Instructions:

Use this worksheet to hold yourself accountable for setting up time in your calendar to run over if you need to.

Tip: If you're having a great conversation with a prospect and they're okay with running over, make sure you give yourself the space to do so.

How much time do you typically give yourself between calls and meetings?	How can you rearrange your calendar so that you give yourself between 15 to 30 minutes between your next call or meeting?

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TIME ALLOTMENT

Instructions:

Use this worksheet to script out how you are going to check for time allotment and what they want to achieve on the call.

"Hey, we were booked for 45 minutes here, just wanted to make sure that still works for you?"	

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Instructions:

Use this worksheet to script out how you are going to stay clear on what they specifically want to achieve during the call.

"Hey, just before we dive into a number of questions, I would love to understand what it is that you really wanted to make sure we review today. What is success in terms of how we spend our time today? What is a great outcome for you?"	

PREPARING YOUR TEAM MEMBERS

Instructions:

Use this worksheet to plan out everything you need to cover in your pre-call huddle with your team.

Purpose of your sales call:

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Who needs to attend the pre-call huddle?			
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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Instructions:

Use this worksheet to create a set of guidelines for you and your team to adhere to around being punctual, along with a process to follow in case any of you are late.

When should the host be logged into the call?	What if the host on your team is unavoidably late? Who will log in and act as the host in the interim?	When should your team be logged into the call?	What do you want someone to do and say in case they are late to the call?

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Instructions:

Use this worksheet to set up your video call software so that you and your team are set up for success when speaking with a prospect.

Tip: Always assume that your prospect is logged in and listening to your conversation. This way you and your team can be mindful about what you are saying so that even if your prospect does login without you being notified, you aren't worried about what they overheard.

- [ ] Head over to your video conference software settings and check the box "Don't start the call until the host logs in". This way if your prospect or anyone from your team or theirs arrives before you do, they won't be left waiting in an empty virtual conference room wondering what to do.

- [ ] Check the option "Receive an alert when someone joins the call," so that you are alerted when someone logs in regardless of whether they are on your team or the prospect's team

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Notes:

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