



# NAVIGATING THROUGH DEMO CALL Worksheets

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

# **RECORDING A CALL**

## Instructions:

Use this worksheet to plan out how to let prospects know that your call is being recorded.

### How do you typically record calls?

- Our call software does it automatically
- By hitting record on the call recording software we use
- Using the phone or laptop's built-in recorder

### Do you typically let prospects know that you are recording the call for quality assurance and training purposes?

- Yes
- No
- Sometimes
- Our software lets them know with a pre-recorded message

**If not, write down a script or line that you can use at the beginning of every call to inform the prospect that you are recording their calls.**

**What will you say and do if a prospect says that they don't want the call to be recorded?**



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# **BUILDING A RAPPORT**

## Instructions:

Use this worksheet to map out how to build rapport on your next sales call.

**How do you feel about building rapport or making small talk at the beginning of the call?**

- Definitely helps build the relationship
- I try and do it but I am not sure if I am good at it
- I think it's a waste of time

## Instructions:

Think back over the last 3 sales calls you did.

	<b>What was the personality and preference of the prospect on each of these calls?</b>	<b>Did you match their style?</b>
<b>Call 1</b>	<input type="checkbox"/> Relational (ie they enjoy talking about the weekend etc) <input type="checkbox"/> Straight to the point	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Call 2</b>	<input type="checkbox"/> Relational <input type="checkbox"/> Straight to the point	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Call 2</b>	<input type="checkbox"/> Relational <input type="checkbox"/> Straight to the point	<input type="checkbox"/> Yes <input type="checkbox"/> No



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## Instructions:

Before your next call, take a few minutes to brainstorm a few things you can talk about in the initial few minutes of the call.

### Things I can talk about during the rapport-building portion of my call:

- Physical location of their office
- Company news based on your research
- Something of interest that you noticed on their Linked-In Profile
- Business project(s)

# INTRODUCTIONS



## Instructions:

Spend a few minutes during your pre-call huddle to plan out what order your team is going to introduce themselves in, and what each of them will say about their role.

<b>How will you introduce yourself and your role?</b>	
<b>How will you hand over introductions to your team?</b>	
<b>How will you hand over introductions to the prospect's side?</b>	
<b>How will you bring it back from the prospect's side into the agenda?</b>	



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# **PROPOSING AGENDA**

## Instructions:

Use this worksheet to create a plan to propose an agenda at the start of the call and to map out what to do if the prospect only wants to focus on pricing.

<b>Do you propose an agenda at the start of your call?</b>	<b>If not, why not?</b>
<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>What do you think is the value of proposing an agenda...</b>	
<b>For you:</b>	
<b>For the prospect:</b>	

## Instructions:

Write out an agenda script to follow on your next call that includes mentioned 3 steps.

<b>1. Propose the agenda;</b>	
<b>2. State the value;</b>	
<b>3. Check for acceptance.</b>	

## Instructions:

Write out your scripts for each of your lines of defense if your prospect just wants to focus on price instead.

**Step 1: Validate that you heard them, and let them know why it's not in their best interest to dive into the pricing/solutioning right away.**

**Step 2: If they still want to know the price, walk them through how your pricing is structured, and give them a couple of ballpark figures.**

**Step 3: If they are adamant about discussing price, walk them through your standard pricing, both on the high- and low-end of the spectrum.**

**Step 4: Walk them through the pricing if they are insistent.**



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# **TIME ALLOTMENT AND GOALS**

## Instructions:

Use this worksheet to plan out how to check for time allotment and goals with your prospect.

<b>How can you check for time allotment with your prospect?</b>	
<b>How can you ask the prospect specifically what they want to achieve on the call?</b>	

Tip: Make a list of what the person on the other end wants from the call. If your original goal is still relevant, make sure to include your plan for what you will do in the call.

# **SELF-PRESENTATION**



## Instructions:

Use this worksheet to map out the proof points you want to cover with your prospect about your organization.

<b>What do you want your prospect to know about your organization? What are some proof points you want to leave your prospects with on the call?</b>	

# LEVEL SET

## Instructions:

Use this worksheet to examine how an opportunity was brought to you, and what information you need to do a level set with your prospect.

<p><b>How do leads flow in your organization: inbound or outbound?</b></p>	
<p><b>Who typically speaks to the customer before you?</b></p>	
<p><b>Where do you go to find notes about the current opportunity, and what information would you share with your prospect during a level set?</b></p>	

# **MAINTAINING ENTHUSIASM**

## Instructions:

Use this worksheet to determine what your levels of energy and enthusiasm need to be on a call.

<b>What do you want to convey to the prospect through your energy and enthusiasm?</b>	
<b>What are your strengths when it comes to your energy and enthusiasm?</b>	
<b>What are your weaknesses?</b>	
<b>What do you need to do in order to convey the right mix of enthusiasm and energy to your prospect?</b>	

# **STAYING PASSIONATE**

## Instructions:

Use this worksheet to figure out how to convey your passion to your prospects.

**How can you convey your passion for what you are selling to your prospect?**

**How can you demonstrate your level of confidence in your ability to solve their needs?**

# Notes:

A large rectangular area filled with a light grey grid pattern, intended for taking notes. The grid is enclosed by a thin grey border.

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