

KEEPING SALES MOMENTUM Worksheets

KEEPING UP WITH TIME



Use this
worksheet to
help you
understand the
importance of
leaving time at
the end of your
call.

How much time do you need to leave at the end of your call to cover pricing, objections, and next steps? At which point during your presentation should you start wrapping things up so that you have enough time to cover anything they need to know in order to take the next steps? What is your game plan when you are 45 min into an hour-long call and you realize that you still aren't close to being finished with your Demo?



PREPARING TO PRESENT PRICING



Use this
worksheet to map
out how to walk
your prospect
through your
pricing structure.

Do you usually walk your prospect through the pricing or do you only offer to email it to them later?	☐ Walk them through it ☐ Email it to them
How much time do you need to walk prospects through your pricing and answer any questions that might arise?	
What can you do if they have sticker shock?	



What are some common questions that come up when you walk prospects through your pricing and how can you handle them?

COMMON QUESTIONS/OBJECTIONS	HOW DO YOU ADDRESS THEM?



GOING OVERTIME



Use this
worksheet to plan
out leaving
enough time for
pricing and
healthy
discussion.

How much time do you need to leave at the end for pricing and objection handling?

At what point during your call do you need to check-in with yourself and evaluate if you are on track with your agenda or not?



Use this
worksheet to plan
out leaving
enough time for
pricing and
healthy
discussion.

What are some ways you can ask the prospect if the meeting can go over?

What are some ways you can ask the prospect if you can book another time to talk?



ASKING INSIGHTFUL QUESTIONS



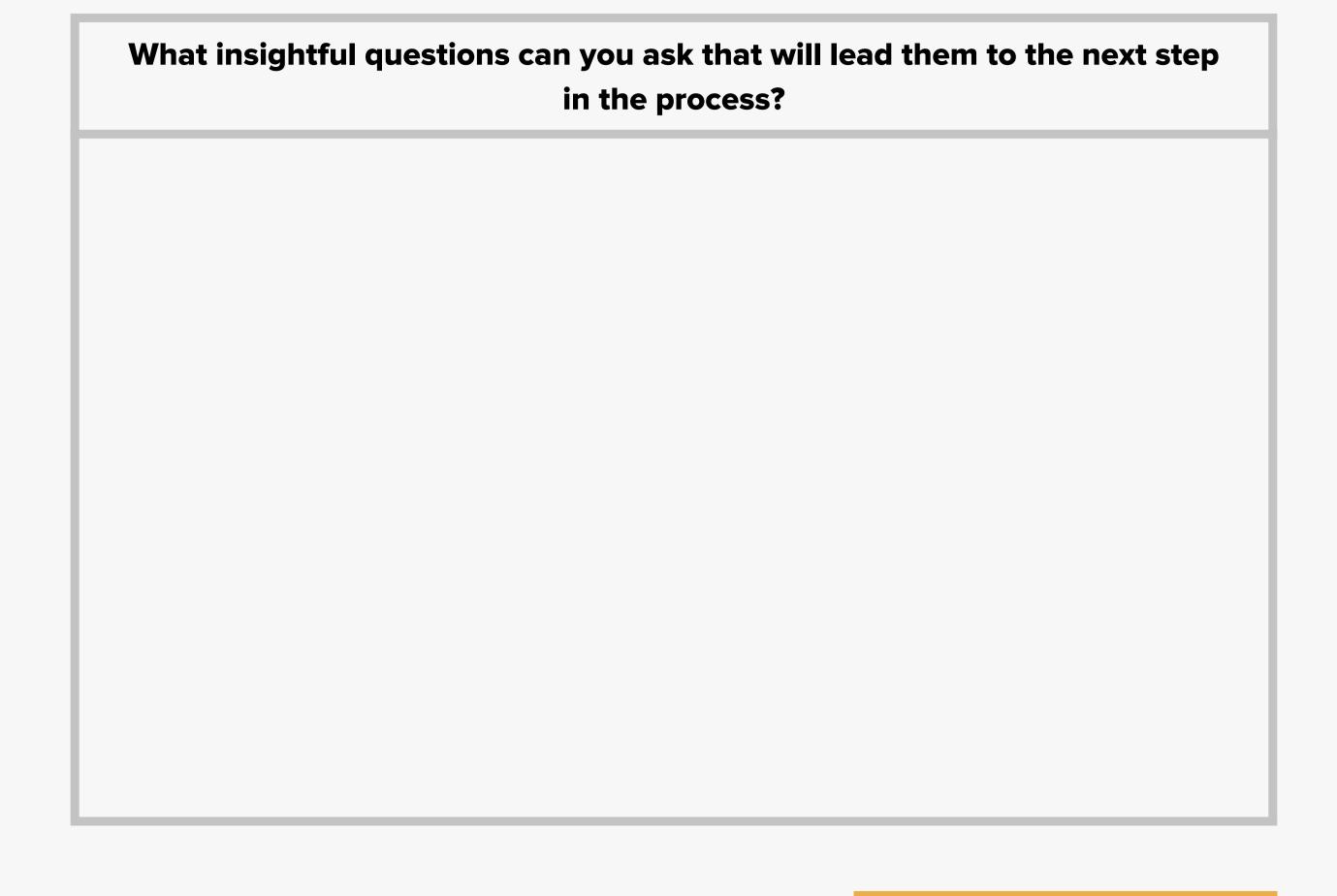
Use this
worksheet to plan
out your "postdemo huddle"
with your
prospect.

How much time do you want to leave at the end for your "post-demo huddle"?

What do you want to cover with your prospect during this time?



Use this worksheet to plan out your "post-demo huddle" with your prospect.





PREPARING FOR NEGOTIATIONS



Use this worksheet to help you plan your negotiation strategy.

How much are you willing to discount your deals on average?

Brainstorm all the things you can ask for in order to make the negotiation a give and take between you and your prospect.

- Can you ask for a longer time commitment?
- More users?
- Better payment terms?



NEGOTIATING WITH YOURSELF



Listen to 3 of your past sales calls. Make a list of other subtle phrases that you use that may detract from the value of your offering.

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Call 1	
Call 2	
Call 3	



Use this worksheet to move you away from negotiating with yourself on calls.

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Do you mention a rate card when you walk your prospect through pricing?	☐ Yes ☐ No
How do you come across to the prospect when you do this	



ASKING PROSPECT'S OPINION



Use this worksheet to recognize the importance of knowing your prospect's thoughts on your solution before discussing pricing.

Write down some questions you can ask your prospect to understand their thoughts on your solution before walking them through pricing.

What's an approach you can use to check-in with everyone who is at the meeting?



COMPERING YOUR SOLUTION



Use this worksheet to map out some ways to ask your prospect about their impressions of your solution.

Why is it important to take note of the prospect's answers to your meaningful checkins? How will you ask them how your solution compares to your competitors'? How will you go around the room and include everyone in your check-in?



PROPOSING NEXT STEPS



For each next step,
you want your
prospects to take,
write down the
value of each step
and note why you
are suggesting
these steps, along
with due dates.

NEXT STEPS YOU WANT YOUR PROSPECTS TO TAKE	VALUE OF THESE STEPS	TIMELINE



Use this
worksheet to
explore different
ways to ask your
prospect how your
solution compares
with other
solutions they are
evaluating.

Write down three ways you can ask prospects how your solution compares to other solutions they are evaluating.

List three to five points in time, during your demo process when you can likely most naturally ask prospects these questions.



GETTING NEXT MEETING ON THE BOOKS



Use this
worksheet to help
you get that next
meeting
scheduled.

Do you always get the next call on the books when wrapping up a meeting?	☐ Yes, always ☐ Sometimes ☐ Rarely ☐ Never
What has typically happened when you have gotten the next call on the books?	
What has typically happened when you haven't gotten the next call on the books?	



Use this
worksheet to help
you get that next
meeting
scheduled.

How can you step out of your comfort zone and ask for a 15minute placeholder call with your prospect to follow up? For you as the sales professional, what's the value of having this call scheduled? For your prospect, what's the value of having this call scheduled?



APPLYING ACCESS & ACCELERATE MINDSET



Map out your
Double Double
strategy for your
next 2 calls.
Remember, It is
meant to remind
you to always look
for opportunities.

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	Think of a prospect. Who else needs to see your solution?	With your prospect, determine who else should be engaged for your next call. Any cross-functional leaders or other senior executives?
Call 1		
Call 2		



THINKING LIKE A PROJECT MANAGER

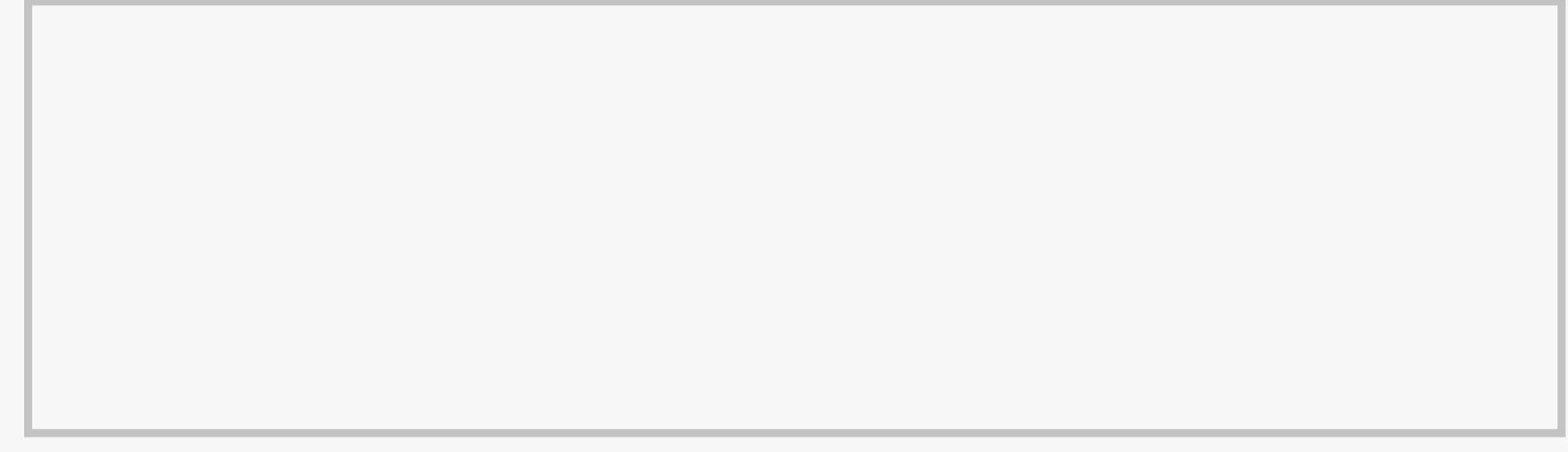


What are some typical tasks that need to be completed as part of your next steps with a prospect? Who needs to complete each of these tasks - you or the prospect?

TASKS THAT NEED TO BE DONE	WHO NEEDS TO DO THEM



Write out a draft email you can use after every meeting to recap the tasks, the timeline, and who owns each task, and when it needs to be done. Send this email after every single meeting to recap and reinforce the next steps.





Notes:







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