Pre-Call Planner Tool

Selling Team Attendees:		
Account:	Date of call:	KARE Designation:

Cast of Characters						
Client Contact	**Role**	**Impact on This Deal** **(High, Medium, Low)**	**Met Before?** (Y/N)	**LinkedIn Connected?** (Y/N)	**DISC Style** D, I, S or C	**Existing Relationship** (Friend, Neutral, Enemy) F, N or E

Selling Side: Have you pre-briefed?

Relationship issues:
Business issues:
Roles/responsibilities:

What should you bring?

- Support materials
- Technical support
- Demo capability e-files
- Delivery/service examples
- Reference materials
- Other

Goals for call:

-
-
-
-

Key questions to ask:

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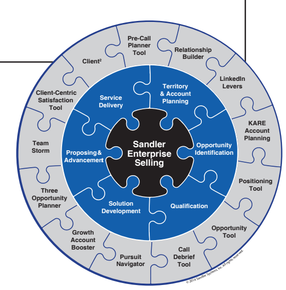
Questions the buyer may ask you:

-
-

Your responses to these questions:

-
-

Planned Up-Front Contract:



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