



Pre-Call Plan Builder

PROSPECT/CUSTOMER NAME

DATE & TIME OF MEETING

SELLING-SIDE ATTENDEES

Name	Job Title	DISC Style	Role in Sales Call

BUYING-SIDE ATTENDEES

Name	Job Title	DISC Style	Role in Decision-Making Process

Goals For the Meeting

What do you want to accomplish in the meeting?

Biggest Fear

What are the potential red flags or concerns going into the meeting?

Up-Front Contract

What is the purpose of the meeting?

How much time has been agreed upon?

What does the prospect/customer want to discuss? What questions might they have for you?

What do you want to discuss/ask?

What are the potential outcomes of the meeting?

Expected Client Questions

What are the top 5 questions you are most likely to be asked?

Key Questions to Ask

What are the top 5 questions you want to ask in the meeting?

Additional Notes, Risks, or Considerations

