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OpenPhone Sales Call Planning Template

Pre-Call Preparation

- ☐ Review prospect's company website and recent news
- ☐ Check CRM for any previous interactions
- ☐ Prepare demo environment with relevant examples
- ☐ Have case studies ready for their industry
- ☐ Test your call recording setup

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1. Warm introduction

- ☐ Welcome and thank them for their time
- ☐ Confirm the scheduled time works for them
- ☐ Set expectations for the call duration

Sample Opening Script:

> *"Hi [Name], thanks so much for taking the time to chat today. We have 30 minutes scheduled, does that still work for you?"*
>
> *"Before we dive in, I'd love to learn more about what brought you to us, walk through how we might help, and decide together on next steps. Does that sound good?"*

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2. Discovery questions

- ☐ Build rapport and understand the "why" behind their call.

- [ ] Qualify the prospect on timeline, budget, and decision-making authority.

💭 About your company

- Tell me about your company.
- Tell me about your role. What do you do day-to-day?

🚀 About your goals

- What metrics are you responsible for?
- Tell me about your goals (financial, customer-related, operational).
- "What are you hoping to achieve by making a change? Do you have specific business goals?"

🤔 About your problem areas

- What problem are you trying to solve?
- "How has this issue affected you/your team's day-to-day operations?"
- I noticed you mentioned [X pain point]. I'd love to hear more about why that's not working for you.

❓Key qualifying questions:

- "How did you hear about us?"
- "What prompted you to start looking for a solution now?"
- "How soon are you looking to find a solution for [X pain point]?"

💰 Timeline and budget

- What's your timeline for implementation?
- "Do you have a budget for a solution?"

✋ Authority

- Who else will be involved in choosing a vendor?
- What's the process for actually purchasing the product once you decide on it?
- Are you the decision-maker, or will other stakeholders be involved in the decision-making process?

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3. Positioning the solution

- [ ] Tie your features directly to their pain points like a prescription.

💊Transition scripts:

- "You mentioned [X pain point] — what if you could skip doing that with our [Y feature]?"
- "Since [X pain point] is slowing you down, it might make sense to show you how [Y feature] speeds that up."
- "Similar businesses have solved [X pain point] with [Y feature]. Can I show you how it works?"

Get confirmation:

- "Can you see your team using this?"
- "Does this fit how you'd plan to use it?"

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4. Close the call with next steps

- [ ] Establish next steps and ensure alignment.

📕Closing questions:

- How are you feeling about this so far? Does it align with what you're looking for?
- Is there anything you want to see that we haven't covered yet?
- If this feels like a good fit, the next step is usually [product demo/trial/quote]. Does [X date] work for you?