



Observation Checklist

MEETING WITH

DATE & TIME

Debrief

In the meeting, did you observe the masterful execution of the following concepts?

CONCEPT	IN CONTROL	NOT IN CONTROL	NOT OBSERVED
Preparation			
Pain Discovery			
70/30 Rule			
Relationship Level			
Meeting Purpose & Agenda			
Clearly Defined Outcomes			
Adult-to-Adult Communication			
Qualification of Pain, Investment, & Decision-Making Process			
New People/New Business			
Lessons Learned			

Recommended Tools, Tactics & References

1. Pre-Call Planner
2. Pain Funnel
3. Reversing/
Curiosity Curve
4. Customer Org Chart
5. Sandler Wheel 1-7
6. Upfront Contract Part A
7. Upfront Contract Part B
8. PAC
9. Conversation Starter
10. Less of, More of,
Different