Pre-call checklist

Check each box before calling.

No checklist is better than how you use it. Promise yourself never to be lazy. Success = discipline

- ☐ Prepared a very short **presentation** of me, my company and services
- ☐ Set goal(s) and purpose for the meeting
  - ☐ Minimum goal(s)
  - ☐ Maximum realistic goal(s)
- ☐ **Reflected** on the person's *most* **negative** & **positive** thoughts on my call
- ☐ Made a **background check** on the person
  - ☐ LinkedIn
  - ☐ Internet search
  - ☐ Company website
  - ☐ My / our history with the participant(s)
  - ☐ Mutual references
- ☐ Contacted people that both you and the person knows and asked questions about him or her:
  - Introvert or extrovert?
  - Fact or feeling orientated?
  - Cold/distant or warm/accommodating?
  - Describe the personality
  - Three words about the person?
  - Can I say that I know you?
- ☐ Saved the person's **e-mail** og other contact information, also in the CRM
- ☐ Found a photo of the person and made **emotional rapport**
- ☐ Made a **background check** on the company
  - ☐ Products / services
  - ☐ Internet search / company database
  - ☐ The company's website
  - ☐ My / our history with the company
- ☐ Reflected on *potential* **culture bearers/stakeholders** according the subject of the call
- ☐ Prepared **facilitating/decision leading** questions
- ☐ Prepared **reasons** for calling
- ☐ Prepared common **objections**
  - ☐ Argumentation for prices
  - ☐ My product/service vs. current solutions/competitors
  - ☐ My product's pros and cons
  - ☐ Obstacles of change
- ☐ Spent 3 minutes just thinking, if I have **forgotten** something

During the call-checklist

Check each box during the call.

Never let your fear of rejection stop you, it's only in your head!

- ☐ **Answering machine**: *"Hello (name), I'm calling from (company name), my name is (name)"*. In a maximum of 20 seconds I explain the reason for calling, in a **happy** manner.

- ☐ **Contact**: Confirm (if relevant) that you have reached the right person. *"Hello, I'm calling from (company), my name is (name). Are you able to speak to me now?".*

- ☐ **No time**: *"When is a better time for you?"*, followed by suggesting a specific **day** and **time** - keep going **until** you have a **concrete** deal about the next contact.

- ☐ **Intro**: Super **short** introduction of your reason for calling with reference to your **common acquaintance** and his or her **description** of the person.

- ☐ Ask what the person thinks of the topic for your call and ask facilitating questions:
  - ☐ Why / what is the reason?
  - ☐ What do you have / do now?
  - ☐ What works well?
  - ☐ What could be better?
  - ☐ If you were to change, what would you change?

- ☐ **Present** your product **from** the answers to the facilitating questions.

- ☐ **Clarify** if the person is **interested** in discovering more or not. Emphasize that your relation is unchanged, no matter the answer - as long as the person makes a clear **choice**!

- ☐ **No interest**: Say you **accept** it and **thank** the person for being honest. If the timing and feeling is there, ask the person about **others** that may be **interested** and whom you may **contact**.

- ☐ **Interest**: Ask the next facilitating questions:
  - ☐ Has the decision been made?
  - ☐ Do you have a budget? (time/money/people)
  - ☐ When do you know, you have chosen the right solution?
  - ☐ If what ever we do together fails, why and what went wrong?

- ☐ Agree on **next** action(s): Meeting? Talk? Tender?

- ☐ **Sum up** the main points of the talk.

- ☐ Agreed on **next** contact:
  - ☐ Date: ______________
  - ☐ Time: ______________
  - ☐ Who: ______________
  - ☐ What:______________

Post-call checklist

Check each box immediately after the call.

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- [ ] I have written down the **result** of the call and my comments in the **CRM** system
- [ ] I have written date and time for follow-up in the **calendar** and **CRM**
- [ ] Connected on LinkedIn
- [ ] Reflected on which **mistakes** I made during the call (minimum one, maximum three)
- [ ] Reflected on what I did very **well** during the call (minimum one, maximum three)
- [ ] **Evaluated** on the pre-call *minimum* and *maximum* goal(s) versus the call's *actual* goal(s)
- [ ] Evaluated on the **effort** compared to the **realistically** *possible* result of the effort - what is the **potential**?!
- [ ] Re-evaluated **minimum** and **maximum** realistic goals
- [ ] Prepared the content and method of **follow-up**
- [ ] **Followed-up** on "leads" I got during the call and let the lead-giver know the outcome
- [ ] Reflected on what I can learn from this call
- [ ] Reflected on what I can do **differently** in future calls
- [ ] Reflected on what I will **continue** to do in my calls