



Sales/Marketing Call or Visit Planning Worksheet

Client / Prospect (Individual & Company Name)	
Line of Business	
Date / Time of Meeting	
Location of Meeting	
Participants in the Meeting	
Decision Makers in the Meeting	

Client Status

Step in the Sales Process? Prepare Connect Discover Present
 Resolve Close Maintain & Retain

Call / Visit Objective: _____

Data Gathering

The following data sources will be helpful to me as I prepare for this meeting:

The following individuals will be helpful to me to learn more about my client and their needs:

ASCEND WITH ARGO

Education. Insight. Connections.



Preparing

I plan to open the conversation by...

I plan to close the conversation by...

I anticipate the following objections to my requests...

The ideal end to the meeting is...

I assume the broker has the following needs...

The main issue from the last communication was...

Differentiators

The main competitors to this business are...

The benefits to the client of this business are...

What differentiates me from the competition is...