

CALL PLANNER

What's the Goal?

(Make sure one is commitment focused)

What do you want to achieve from this call? What level of advance could you create?
What relationship do you currently have and where would you like to progress it to?

Who are you talking to?

Which persona best represents them? What are likely to be the topics they'd like to discuss given their challenges and goals?

What is your weapon of choice?

What purpose will you share with them for the call? Make sure you frame the call as being of benefit to them rather than purely for you

How can you warm the call up?

Who do you both know? Who have you worked with that they would know (company or contact)

What do you need to discover or qualify?

What do you know about the person you are calling and their business? What are their objectives for the next three to six months? What do you not know that will help you to help them?

AFTER THE CALL

Make good notes on your CRM. I recommend the following structure:

- Goal
- Discussion points and discoveries
- Objections
- Outcome
- Next Step