

Sales Tools/Pre-Call Planning/Check List

PRE-CALL PLANNING SALES CALL OBJECTIVES CHECK LIST:



- Planning to be on time
- Your appearance and your attitude
- The agenda for the meeting
- Your credibility statement or your company's overview
- The questions you are going to ask
- Your investment philosophy
- The presentation tools you plan to use to support your key points
- The objections you anticipate the prospect may have
- Your closing strategy – what is the next step with the prospect
- How you plan to ask for referrals

LIKELY NEXT-STEP ALTERNATIVES TO SUGGEST AT THE END OF THE CALL:



- Open an account
- Schedule the next appointment
- Gather additional paperwork or information
- Meet their other advisors