

# Pre-call Planning

Company Name:

Contact Name:

Telephone number:

Source of lead:



## Why?

What's the reason you're talking in the first place?

## Objectives?

What you plan to achieve within the conversation?

## Premise?

What do you know about your prospect's situation?

## Plan?

How do you plan to reach the objectives?

## Anticipate?

What could go wrong and if it does, how do you react to it?