

# Pre-Call Planner Tool

Selling Team Attendees:						
Account:	Date of call:	KARE Designation:				
Cast of Characters						
Client Contact	Role	Impact on This Deal (High, Medium, Low)	Met Before? (Y/N)	LinkedIn Connected? (Y/N)	DISC Style D, I, S or C	Existing Relationship (Friend, Neutral, Enemy) F, N or E

<b>Selling Side:</b> Have you pre-briefed? Relationship issues: Business issues: Roles/responsibilities:	
<b>What should you bring?</b> <ul style="list-style-type: none"> <li>• Support materials</li> <li>• Technical support</li> <li>• Demo capability e-files</li> <li>• Delivery/service examples</li> <li>• Reference materials</li> <li>• Other</li> </ul>	
<b>Goals for call:</b> • •	
<b>Key questions to ask:</b> • •	
<b>Questions the buyer may ask you:</b> • •	<b>Your responses to these questions:</b> • •
<b>Planned Up-Front Contract:</b>	

