

Pre-Meeting Planner

Prospect Company Name:

Location:

Date of Meeting:

Prospect Participants:

Internal Participants:

Background Information:

Meeting Objectives (Yours):

Meeting Objective (Prospect's):

High Gain Questions to Ask:

Anticipated Objections w/Answers:

General Meeting Structure:

POST MEETING

Discussion Notes:

What Worked?

What Didn't?

Next Steps (include date/time and who is responsible):