

Sales Call Planner/Report

Date of call:

Type: New Follow-up Routine Customer Requested Problem

Method: In Person Telephone Online Off Site Other

Contact names and titles (who am I meeting with?)

Call objectives (what do I need to find out?)

Questions to ask (how am I going to find out?)

Responses to questions (did I find out what I needed?)

Action plan for next call (what needs to be done, by whom and by when)

Date and time for next meeting (with whom?)