[Company name]

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Sales Meeting Preparation Sheet

Preparing for a sales meeting properly: client background, questions to ask, materials to take, and outcomes to record.

Document: Sales Meeting Preparation Sheet **Version:** 1.0

Prepared by: _____ **Owner:** _____

Date: _____ **Review date:** _____

Meeting details: Salesperson: _____ **Client company:** _____

Meeting contact: _____ **Meeting date:** _____

Meeting objective: _____ **Product or service:** _____ **Location / link:** _____

Client background: Client company size: _____ **Current supplier:** _____

Previous dealings with us: _____ **Known needs:** _____

Decision maker attending?: _____ **Budget signal:** _____

Preparation checklist: [ ] Client background researched and noted above.

[ ] Meeting objective ([Meeting objective]) written in one line.

[ ] Questions for [Meeting contact] prepared (see below).

[ ] Samples, brochure, or presentation for [Product or service] packed.

[ ] Pricing and terms for [Product or service] checked and current.

[ ] Travel or video link tested before [Meeting date]. **Questions to ask:**

Question	Why it matters	Answer given

Meeting outcomes

Agreed outcome or action	Owner	Due date

Completion checklist: [ ] The meeting objective ([Meeting objective]) is written before the meeting.

[ ] Questions for [Meeting contact] are prepared with a reason for each.

[ ] Outcomes and next steps are recorded the same day as [Meeting date].