

Precall Plan Questionnaire



Who will be in this meeting and how did this meeting come about? Are they decisionmaker and are there other stakeholders to your solution?

What are the most recent trends in the company's industry? Source?

What is the company's position in this industry, (I.e. leader, follower, growing, declining)?

What are the company's key business drivers and initiatives? What is your source and will your ideas make an impact on those drivers?

What would be their biggest rebuttal? (play devil's advocate)

What is the ROI of implementing your solution if necessary? Never leave this to the customer to figure out.

What is the next logical step?

What is the follow up plan, timeline, and method?