Why These Worksheets Work

The goal is not paperwork. The goal is to train the way you think.

Think of these worksheets like Mr. Miyagi's wax-on, wax-off exercises in The Karate Kid. The movements looked repetitive and disconnected at first. That was the point. Repetition built the habits before the student fully understood when he would need them.

These sheets work the same way. Before the call, they force you to define why you are going, what you already know, what you still need to learn, the questions that matter, and the outcome you are trying to create. After the call, they force you to separate facts from feelings, identify what changed, define the next step, assign ownership, and document reality.

Use them on every meaningful sales call for a defined period of time until the thinking becomes automatic. Thirty to sixty days is a good starting point. A new or struggling salesperson may need them longer. A veteran may use them selectively on important calls, stalled opportunities, unfamiliar accounts, major tests, or situations where the process has started to drift.

The point is not to become dependent on a form. The point is to build the mental discipline behind the form. Once that discipline is locked in, you may not need to complete every field every time. You should still be able to answer the questions without guessing.

Come back to these worksheets periodically. Use them when your calls start becoming casual, your follow-up gets vague, your pipeline fills with weak opportunities, or you realize you are staying busy without moving anything forward. They are a reset tool. They bring the salesman back to the habit of defining the call before it happens and defining the next action before the opportunity goes cold.

Recommended Use	
New or struggling salesperson	Use before and after every meaningful call for 30-60 days.
Experienced salesperson	Use for major calls, new accounts, tests, stalled opportunities, and high-value pursuits.
Manager or coach	Review completed sheets to coach judgment, not just activity.
Periodic reset	Return to the sheets whenever call quality, follow-up, or pipeline discipline starts to slip.

Preparation creates better questions. Better questions create better decisions.

Prospecting and Sales Call Planning Worksheet

Use this before a prospecting call, customer visit, follow-up meeting, demo, test, or opportunity discussion.

Call Basics

Account		**Date**	
Contact / Title		**Phone / Email**	
Location / Site		**Channel Partner**	

Call Type

☐ New Prospect
☐ Follow-Up
☐ Opportunity Review
☐ Recovery Call
☐ Existing Account
☐ Discovery
☐ Demo / Test
☐ Other: ________

Before the Call

Why am I making this call? Be specific. If you cannot answer this, the call is already weak.

____

____

What do I already know?	**What do I need to learn?**	**What would make this call worth the customer's time?**

My working hypothesis: based on what I know, I think the issue, opening, or opportunity may be...

Question I need to ask	**Why it matters / what I am listening for**
1.	
2.	
3.	
4.	

Desired Outcome

☐ Learn whether the account deserves more time
☐ Identify a real problem
☐ Find the right contact
☐ Get access to another person
☐ Schedule a follow-up meeting
☐ Define a next step
☐ Qualify or disqualify the opportunity
☐ Move a current opportunity forward

Specific desired outcome for this call

After the Call Review

Use this immediately after the call while the facts, commitments, and warning signs are still clear.

What Did I Learn?

Capture facts, not feelings.

Problem / Need Confirmed?	Who matters now?	What changed or became clearer?

Did This Call Create Something Useful?

☐ Clarity
☐ Value
☐ Business intelligence
☐ A reason to continue
☐ Movement
☐ Access
☐ A real next step
☐ Stop wasting time here

Next Step: What Happens Now?

Next Step Owner		**Due Date**	
Follow-Up Method		**Follow-Up Date**	
My Commitment		**Customer Commitment**	

Owner and Follow-Up Options

☐ Me
☐ Manager
☐ Technical Support
☐ Customer
☐ Channel Partner
☐ Call
☐ Email
☐ Meeting / Visit / Demo-Test

Account / Opportunity Decision

☐ Pursue
☐ Research further
☐ Put into basic coverage
☐ Disqualify for now
☐ Revisit later
☐ Needs manager input
☐ Needs technical support
☐ Needs channel partner follow-up

Notes to Document in CRM or Account File

Reality Check

☐ Did I leave with a clear next step, owner, and follow-up date?
☐ Did I learn something useful enough to improve the next action?
☐ Was this call real progress, or just activity dressed up as progress?