

Prospecting:

| Rep Owner: | Action Items: | Date: |
|---------------|---------------|-------|
| | | |
| JSI Owner: | | |
| | | |
| Dealer Owner: | | |
| | | |

What prework does the team need assistance with?: (example: research and gaining of knowledge before call):

Additional Considerations:

Sales call discovery: (first call to client, setting up first appointment, goal of meeting)

| Rep Owner: | Action Items: | Date: |
|---------------|---------------|-------|
| | | |
| JSI Owner: | | |
| | | |
| Dealer Owner: | | |
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What prework does the team need assistance with?: (example: know audience before call, understand what hot topics would be to secure an appointment.)

Additional Considerations:

Presenting Solutions: (face to face first meeting)

| Rep Owner: | Action Items: | Date: |
|---------------|---------------|-------|
| | | |
| JSI Owner: | | |
| | | |
| Dealer Owner: | | |
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What prework does the team need assistance with?: (Remember to listen first, but have talking points ready if asked questions by client.)

Additional Considerations: