

## 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:		

**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:		

**What prework does the team need assistance with?:** (Remember to listen first, but have talking points ready if asked questions by client.)

**Additional Considerations:**