

Beemac Pre-Call Planning Worksheet

Name

Call/Meeting Date Time

Company Name

Name	Title	Status		
		Decision Maker	Influencer	Gatekeeper
		Decision Maker	Influencer	Gatekeeper
		Decision Maker	Influencer	Gatekeeper
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What We Think We Know So Far

Define the Desired Outcome

Single:

Double:

Homerun:

What information do you seek to understand? What information would you like to uncover?

What information do you need to present/What should they know after?

Additional Notes

What is the mutually agreed upon, in the calendar, next step follow up after this call? (NO MUTUAL MYSTIFICATION)