

# The Six Steps of the Sale Meeting Guide

Name of Contact:

Job Title:

Company:

Phone Number:

Email Address:

Appointment Date/Time:

Key Research:

Objective of Meeting (Starting Goal):

Time Length of Meeting:

My Role / Expectations:

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- 
- 

Decision Maker's Role / Expectations:

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- 
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Decision Maker's Pain Points:

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- 
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End Result / Next Steps:

- Ready to move forward
- Not the right time/need additional decision-maker; will follow back up on:
- Not moving forward

