

# Sales Meeting Checklist

<i>Account details</i>		
<b>Prospect Name</b>	<b>Primary contact</b>	<b>Phone number</b>
<b>Location</b>	<b>Call date</b>	<b>Call time</b>
<i>How did you get this meeting?</i>		
<i>Prospect Meeting Participants (name, title, role)</i>	<i>Prospect Executive Team Members</i>	
<i>Website Research (industry, competitors, charitable interest, etc.)</i>	<i>LinkedIn Research (mutual contacts, common interests, education, etc..)</i>	
<i>Insight from Prep Call</i>	<i>Dark Web Scan Result Insights</i>	
<i>Sales Engineer Availability</i>	<i>Top Pain Points Identified in Meeting</i>	
<ul style="list-style-type: none"> <li>○ _____</li> <li>○ _____</li> <li>○ _____</li> </ul>		

