[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Sales Meeting Preparation Sheet

Preparing for a sales meeting properly: client background, questions to ask, materials to take, and outcomes to record.

Document	Sales Meeting Preparation Sheet
Prepared by	[Name and role]
Owner	[Name and role]
Version	1.0
Date	[DD Month YYYY]
Review date	[DD Month YYYY]

Meeting details

Field	Entry
Salesperson	[Salesperson name]
Client company	[Client company]
Meeting contact	[Meeting contact]
Meeting date	[Meeting date]
Meeting objective	[Meeting objective]
Product or service	[Product or service]
Location / link	

Client background

Field	Entry
Client company size	
Current supplier	
Previous dealings with us	
Known needs	
Decision maker attending?	
Budget signal	

Preparation checklist

	Client background researched and noted above.
	Meeting objective ([Meeting objective]) written in one line.
	Questions for [Meeting contact] prepared (see below).
	Samples, brochure, or presentation for [Product or service] packed.
	Pricing and terms for [Product or service] checked and current.
	Travel or video link tested before [Meeting date].

[Company name]

Questions to ask

Question	Why it matters	Answer given

Meeting outcomes

Agreed outcome or action	Owner	Due date

Completion checklist

	The meeting objective ([Meeting objective]) is written before the meeting.
	Questions for [Meeting contact] are prepared with a reason for each.
	Outcomes and next steps are recorded the same day as [Meeting date].