Ashford Business Services Ltd

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
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Owner	David Okafor, Finance Manager
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Review date	9 November 2026

Meeting details

Field	Entry
Salesperson	Emma Clarke
Client company	Harborne Retail Group Ltd
Meeting contact	Meeting contact
Meeting date	9 November 2026
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 9 November 2026.

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 9 November 2026.