[Company name]

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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	

[Company name]

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].

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].