

# Meeting Planner

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**Client:**

**Meeting Date:**

**Company Participants:**

**Client Participants:**

**Meeting Objective:**

<b>Advance:</b>	What Advance would you like the client to commit to?
<b>Opening:</b>	What are you going to say to open the call?
<b>Situation Information:</b>	What facts do you need to know to qualify the client or to uncover situations which might yield problems?
<b>Objections or Consequence Issues:</b>	Are you anticipating any objections/consequences? If so, what are they and how do you plan to handle them?
<b>Competition:</b>	Is competition involved? If so, how does the competition impact our plan for this call?
<b>Problems:</b>	
<b>Implications:</b>	
<b>Explicit Needs/Need-Payoff:</b>	

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Next Scheduled Step(s):

Other Notes: