



Checklist for your Sales Presentation

A sales presentation that is tailored to address your prospect's unique needs and interests is a prerequisite for success. Use the following checklist to help you gather key information about your prospect and the opportunity.

THE OPPORTUNITY

- Identify the opportunity
- Qualify the prospect
- Set an actionable goal
- Identify the challenge
- Discover the trigger event
- Determine the current solution

THE IMPACT

- Establish the impact of the problem
- Identify the impact of the solution
- Determine key performance indicators (KPI)
- Confirm timing and expectations

THE COMPETITION

- Identify the competition
- Research buying history
- Do a competitive analysis

THE LOGISTICS

- Determine who will be at your presentation
- Agree on the format
- Establish the time and date
- Confirm the venue
- Make arrangements to set up
- Determine your travel needs

THE AUDIENCE

- Identify roles.
- Get contact information
- Schedule discovery calls
- Conduct discovery conversations
- Define point of view and personal impact
- Confirm your audience's decision-making process