Cold Call Planner

1. Cold Call Planner
Earn the meeting

→ **2. Pre-Sales Meeting Planner**
Prepare with the 3x3

→ **3. Sales Meeting Planner**
Lead the meeting

PERSONA (AVATAR) I'M CALLING

INDUSTRY I'M CALLING

DESIRED OUTCOME OF CALLS

DATE AND TIME BLOCKED	# OF CALLS TO MAKE	ACTUAL CALLS MADE	CALLS CONNECTED	CALLS RETURNED	MEETINGS BOOKED

- [ ] I have a DRIVE mindset for success (Discipline, Resilience, Insight, Versatility, Empathy)
- [ ] I will log each call with notes in my CRM.

What value will I deliver?

Top performers turn a cold call into a value call: they open with a goal the persona is likely pursuing and offer something of relevant value, such as an insightful article, checklist, or assessment.

My opening

Open with one sentence that connects who you are to that goal.

One question to start a conversation

Turn the call into a conversation early with a relevant question that guides the call and isn't focused on their solution.

Anticipate resistance

Expect pushback and respond respectfully. (e.g. No thanks, I'm busy. → That's why I called to see when a more convenient time is available for you.)

WHAT THEY MAY SAY	HOW I'LL RESPOND

My next-step ask

Ask for a specific meeting with a date and time.

- [ ] Meeting booked. Move to the Pre-Sales Meeting Planner.

3x3 Pre-Sales Meeting Planner

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COMPANY

MEETING DATE

TIME WE HAVE

3 facts about the company

Top performers walk in knowing the company's latest news and the strategic goals it's likely working toward.

1

2

3

3 industry trends

Understand the forces shaping the buyer's industry this year.

1

2

3

3 high-impact discovery questions

Prepare a few questions that explore the buyer's business results and priorities.

1

2

3

Research the 3x3 in five minutes

Paste this into your AI service before your meeting:

"Research [Company]. List three recent facts about its news, goals, priorities, or challenges, and three trends affecting its industry this year. Include the source and date for each. Then suggest six discovery questions I could choose from for my first meeting with them."

Meeting Success Checklist

Top performers complete these before every meeting.

- [ ] Send agenda and confirmation email
- [ ] Practice high-impact questions
- [ ] Prepare your next step with date and time
- [ ] Anticipate questions or objections

Sales Meeting Planner

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1. Define your meeting goals

Top performers define what they want to accomplish, what the buyer expects, and what value they will deliver.

My measurable goals

Their expectations

What value will I deliver

2. Understand attendees

Know each attendee's role, priorities, and likely questions.

NAME AND TITLE	ROLE	TOP PRIORITIES AND EXPECTATIONS

3. Engaging opening

Take the lead with a short, intentional opening.

- [ ] Greeting and rapport building
- [ ] Purpose, benefit, and time check
- [ ] Recap how you got here
- [ ] Transition to their needs

4. Discovery questions

Ask open questions with genuine empathy and listen about 70% of the time.

Validate their current state

Explore the immediate results needed

Connect to their strategic goals

Next commitment to ask for

5. Lead it forward

End a few minutes early with clear owners and a scheduled next step.

- [ ] Summarize key points
- [ ] Confirm who owns action items
- [ ] Ask for feedback
- [ ] Schedule the next meeting
- [ ] Thank them genuinely
- [ ] Send a personalized follow-up

Want your sales team to plan and lead every call to drive stronger results? Explore Bold Value Selling →