



Checklist for Successful A Sales Pitch

Company Name: _____

Meeting Location: _____

Type of Business: _____

Contact Name: _____

Contact Phone Number: _____

Contact Email Address: _____

Meeting Time: _____

Industry: _____

Customer Base: _____

Products/Services: _____

Competitors: _____

What is the goal of this meeting? What type of meeting is it?

What value do you intend to provide? What do you plan to leave with them to take back?



Do you expect a follow-up meeting? If yes, don't forget to mention/ask them.

Are you hosting an "event"? (ex. do you plan to have catering involved?)

If yes to question 4, what time is the catering supposed to arrive? What did you order?



Based on your initial impression, what are their needs? AKA their issues or problems you intend to solve.

What first impression do you have with regards to a solution for their needs?

When could you begin working together?



Meeting Recap:
