CLIENT CALL & CONSULTATION ACTION RECORD SHEET

DISCOVERY INTAKE, CLIENT PAIN POINTS, SOLUTIONS & PROPOSAL ROADMAP

CLIENT / COMPANY: _____ **CALL DATE:** _____/_____/20____ **CONTACT:** _____ **CALL TYPE:** [ ] Discovery [ ] Review

CURRENT REVENUE / SCALE: _____ | **BUDGET ALLOCATED:** $ _____ | **DECISION MAKER:** [ ] Yes [ ] Gatekeeper

SECTION 1: CLIENT OPERATIONAL REALITY & CURRENT PAIN POINTS

SECTION 2: PROPOSED SOLUTION ARCHITECTURE & DELIVERABLE SCOPE

SECTION 3: OBJECTIONS RAISED & REBUTTAL STRATEGY

SECTION 4: CONSULTATION ACTION ITEMS & FOLLOW-UP TIMELINE

DONE	NEXT ACTION STEP / PROPOSAL ASSET	RESPONSIBLE PARTY	DUE DATE	STATUS
[ ]		[ ] Us [ ] Client	____/____	[ ] Sent
[ ]		[ ] Us [ ] Client	____/____	[ ] Sent
[ ]		[ ] Us [ ] Client	____/____	[ ] Sent
[ ]		[ ] Us [ ] Client	____/____	[ ] Sent
[ ]		[ ] Us [ ] Client	____/____	[ ] Sent

100% Free Printable Download | free-digital-products.readernook.com | Personal & Commercial Use