SALES CALL DISCOVERY & QUALIFICATION NOTES SHEET

B2B PROSPECT DISCOVERY, BANT / MEDDPIC QUALIFICATION, PAIN POINTS & ACTION PLAN

PROSPECT COMPANY: _____ **PRIMARY CONTACT:** _____ **TITLE:** _____

ACCOUNT EXECUTIVE: _____ **CALL DATE:** _____/_____/20____ **DEAL SIZE EST: $** _____

CURRENT TECH STACK: _____ **COMPANY SIZE:** [ ] 1-50 [ ] 51-200 [ ] 201-1k+ **CALL TYPE:** [ ] Initial [ ] Demo [ ] Closing

1. CURRENT SITUATION, STRATEGIC DRIVERS & CORE PAIN POINTS

P1. _____

P2. _____

P3. _____

P4. _____

2. BANT / MEDDPIC STRATEGIC QUALIFICATION SCORECARD

BUDGET & FINANCIAL CAPACITY

Formal budget allocated for initiative? [ ] Yes [ ] In Progress [ ] No

Target budget range: $ _____ Source: _____

Economic Buyer: _____ Title: _____

AUTHORITY & DECISION COMMITTEE

Decision Maker / Signer: _____ Internal Champion: _____

Decision Process / Stages: [ ] Demo [ ] Security [ ] Legal [ ] Board

Procurement & Legal review window: _____ weeks

NEED & COMPELLING EVENT

Quantifiable Cost of Inaction: $ _____

Urgency / Compelling Event driving priority: _____

Key technical requirements / dealbreakers: _____

TIMELINE & GO-LIVE MILESTONE

Target Go-Live / Deploy Date: _____/_____/20____

Evaluation decision deadline: _____/_____/20____

Competitors under evaluation: [ ] Incumbent [ ] Competitor A [ ] In-house

3. OBJECTIONS RAISED, COMPETITOR COMPARISON & BUYER HESITATIONS

_____

_____

_____

4. MUTUAL ACTION PLAN (MAP) & CONFIRMED NEXT STEPS

STEP	AGREED ACTION ITEM / MILESTONE DELIVERABLE	OWNER (BUYER / SELLER	DUE DATE	STATUS
01		_____	___/___/20__	[ ] Done
02		_____	___/___/20__	[ ] Done
03		_____	___/___/20__	[ ] Done
04		_____	___/___/20__	[ ] Done