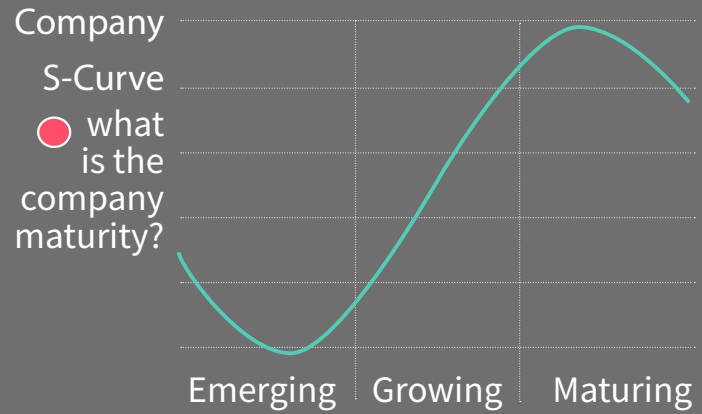
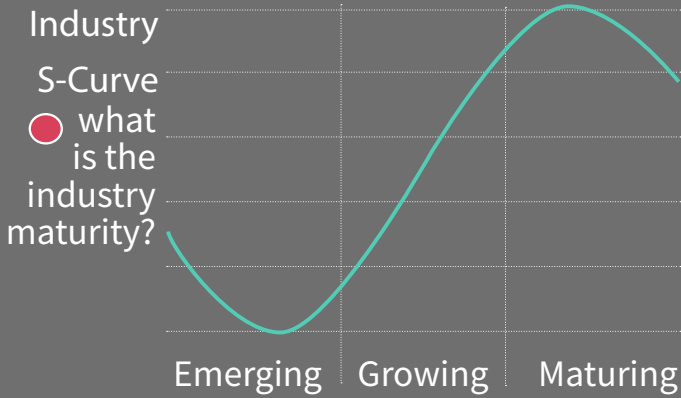




Be Ready Worksheet



Company Info

Person + Interest

Name

Name

Industry

Bio / Profile/LinkedIn

Purpose

Background

Products / Services _____

Why did they want to meet? What outcomes do they expect?

Founded / Years in Operations _____

Employees _____

Revenue _____

Rel News _____

Growing/Shrinking _____

What do we know about their Vex (Pain)?

() _____

What do we know about their Vision (Goal)?

() _____



Be Ready Worksheet

Openers/Questions



What type of “FactStory” are you teaching? What are your key ideas or insights?



What possible outcomes (besides the deal) could get you both excited?



How well aligned is the purpose of their business with yours? Curious?



What risks or objections do you want to proactively navigate? Avoid?

Before Meeting

Do homework and script out your insight

During Meeting

Challenge yourself and the client to listen

After Meeting

Capture notes and document in CRM

Want to print this again?

This worksheet is in our Steal Our Stuff folder. Just scan the QR code or download at:

<https://www.thescaleupgroup.com/>

