

SALES CALL REPORT TEMPLATE

CALL INFORMATION

PROSPECT DETAILS

USE CASE

Call Date	Call Time	Call Duration	Type of Call	Name	Role	Contact	Use Case Fit	Tool Stack
-----------	-----------	---------------	--------------	------	------	---------	--------------	------------

Call Plan:	Prep Notes:	Email	Decision-maker or not? If not, any details of the decision-maker?	Additional Details
------------	-------------	-------	---	--------------------

FEATURE DETAILS

COMPETITOR DETAILS

Feature they like	Any specific requirements?	Are they evaluating other tools?	Reason to find a new solution
		If yes, which tools?	

CALL SUMMARY

Next Steps	Follow-up Date
------------	----------------

CALL ANALYSIS

Closing Potential	Account Value
-------------------	---------------