

**Basic Contact
Information**

* **Name, Title**: Neil McDonnell, President
* **Meeting Phone**: Teams Video Call (or 757-383-7415,,59999999#)
* **Date / Time**: Monday March 24, 2022 / 1PM EST
* **Other Attendees**: Your name and others

**Situation Questions** (Strictly factual questions to learn more about their environment.)
**Problem Questions** (Questions “uncovering” issues they have, and you can solve.)

**Meeting Objective (measure of success)**

* **Primary**: Agreement to continue and put mutual NDAs in place (SAMPLE)
* **Secondary**: Get verbal agreement to add us to SeaPort NxG and other vehicles (SAMPLE)

**Purpose of Call** (Share the purpose. Make it clear you respect their time and have prepared.)

* Introduction of my company and an understanding of your organization
* See if there is a fit between the two companies to work towards Navy and other federal goals

**Introduction Talking Points** (Couple of quick topics to break the ice other than the weather)

* Saw you did a LinkedIn Live meeting on making cold calls. Folks must have loved it. (SAMPLE)
* If you have one good one, then that’s fine. Or you can put in two small ice breakers. (GUIDANCE DELETE)

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**Call Plan Sheet – [Company Name]**

Research Notes

* Replace the word “Template” in the file name with the company and person you’re calling.
* Use this section to capture any research notes and links that could be useful to reference later.
* Watch [a video on the GovCon Chamber site](https://www.govconchamber.com/blog/how-to-ask-the-right-questions-for-federal-sales) to learn about writing the best questions.