



IMPACT
SELLING ACADEMY

The First Meeting Call Plan Template

This detailed template is an explicit resource for planning every critical component of your initial discovery call or meeting, ensuring you stay structured, cover your research, and capture the key information needed to move the deal forward.

Section 1: Logistics & Preparation

Use this template to congratulate the company and offer a solution that helps them scale or utilize the new capital effectively.

Field	Purpose	Notes/Fill-in-the-Blank
Date & Time	Meeting Schedule	[Date] at [Time] ([Duration] minutes)
Attendees (Internal)	Your team members and roles	[Your Name/Role], [Colleague Name/Role]
Attendees (Prospect)	Prospect team members and roles	[Prospect Name/Title], [Colleague Name/Title]
Meeting Goal	The <i>Single</i> desired outcome for <i>this</i> call (e.g., Secure next meeting, Confirm pain points, Qualify budget).	[Specific, Measurable Goal]
Meeting Questions	List of questions to ask the prospect. This is based on the consultative questions taught in the Impact Selling Academy.	[Questions regarding their current situation, their goals, their pains and their needs. Split into categories: Situation Questions, Problem Questions, Implication Question, Need Question]
Next Step Goal	What you will explicitly ask for at the end.	[Specific Next Step: e.g., A follow-up call with the CFO]

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