

Worksheets and templates for
SALES PRESENTATIONS & DEMONSTRATIONS
Self-instructional Handbook

By Michael McGaulley

If you already have the paper book or e-book version, you will find these are expanded (in size) versions of the worksheets and templates used in the book. They are labeled according to the section or question to which they relate.

Don't have *SMART QUESTIONS*? You can order it [via Amazon for instant e-book delivery](#).

Please bear in mind that these are not “forms” that must be filled out; rather, they are templates or mental models to help you structure and make more sense of information and ideas. If they help, fine; if not, no need to feel obliged. (Unless, of course, you might like to have a later record of your thinking now.)

The numbers correspond to the worksheet's place in the Table of Contents in the e-book version

Part I #2

| Decision Influencers and others you think should be present | Why each |
|---|----------|
| | |
| | |

Part I #5

| Need | Why/how it matters to this Prospect | What it costs to leave that need unfilled | How I or my product / service can fill that need | How my product / service can help pay for itself by filling that need |
|------|-------------------------------------|---|--|---|
| | | | | |

Again Part I #5

| Need | How my product / service can help fill each of these needs | Value of filling those needs |
|------|--|------------------------------|
| | | |
| | | |

Part I #8

A presentation to

Research Branch
XYZ Corporation

by Robin Weston
GEM Manufacturing

Date

Objectives of this demo:

To show how the GEM 4500 can meet these agreed-upon needs of the XYZ Corporation:

- Produce more than ____**
- At a cost of less than ____**
- With down-time of less than ____**

Part II #2

| |
|----|
| 1. |
| 2. |
| 3. |

Part II #6

| Task | Who is responsible / customer's input | Date |
|-----------------------------------|---|--------------------------|
| Review of specific requirements | Prospect's name (person who will be signing the contract), plus your name | Today's date |
| Your first step | What cooperation you will need from the Prospect, such as space, staff help, and the like | Add |
| Your second step | A contact person with the Prospect firm | Add |
| What other steps you will perform | Ditto | Add |
| Wrap-up / conclusion / evaluation | Ditto | To be jointly determined |

Final Application exercise

| Signal | Typical meaning |
|--------|-----------------|
| | |