

Blank B2B Sales Call Management Template

Call Details

Date

Time

Salesperson

Full Name

Client Company

Company Name

Contact Person

Name & Position

Phone/Video Platform

e.g., Zoom, Phone

Call Type

Intro/Discovery/etc.

Agenda / Objectives

List main topics, client objectives, etc.

Client Needs / Pain Points

Identify challenges, needs, and requirements

Solutions / Recommendations

Proposed solutions, products, or services

Objections / Concerns

List any client objections or concerns

Follow Up Actions

Summarize next steps, commitments, deadlines

Additional Notes

Other important information from the call