

PRINTABLE WORKSHEET

Cold Call Prep Card Template

A one-page structure for knowing what to say before you dial — opener, relevance hook, discovery questions, objections, and next step.

How to use it: complete this card for one real prospect. Keep it visible during the call. After the call, mark what worked, what failed, and what to practice next.

1. Prospect Snapshot

Field	Fill it in
Prospect / Company	
Role / Decision Maker	
Likely pain	
Trigger event	
Why now?	
Best proof point to mention	

2. 12-Second Opener

Template: “Hi [Name], it’s [You] from [Company]. I know I’m catching you cold, so I’ll be brief. We help [specific audience] solve [specific painful problem] without [thing they hate]. Did I catch you at a terrible time?”

Conversation Readiness example:

“Hi Sam, it’s Alex from Conversation Readiness. I know I’m catching you cold, so I’ll be brief. We help contractors and service businesses stop winging estimate calls by practicing with AI

buyers before the real conversation. Did I catch you at a terrible time?"

3. Relevance Hook

Use one of these:

- “Most [audience] I talk to are losing deals not because their offer is bad, but because the explanation gets messy under pressure.”
- “The expensive part is not the call. It’s the missed job after a rushed estimate explanation.”
- “If your team stores customer details in a CRM but never practices the actual conversation, there’s a gap.”

4. Discovery Questions

Pick three, not ten.

1. “What conversations are hardest for your team right now — cold calls, estimates, complaints, or follow-ups?”
2. “When a call goes badly, is it usually lack of information, lack of confidence, or not knowing how to handle pushback?”
3. “How do you prepare today before an important customer conversation?”
4. “What happens after someone loses a deal — is there a feedback loop, or does everyone just move on?”
5. “If you could give a rep one card before a call, what would it need to include?”

5. Likely Objections and Responses

Objection	Response
“We already use ChatGPT.”	“That works for generic scripts. This is a private workflow for your docs, roleplay, scoring, prep cards, and call tracking.”
“We don’t want cloud AI.”	“That’s the point — it runs locally. Customer data stays on your machine.”

Objection	Response
"We're too busy."	"Then use it only before calls you can't afford to wing. A five-minute prep card beats a lost deal."
"Sounds like training."	"It's practice, not theory. Sales courses tell you what to say. This lets you rehearse saying it."

6. Close / Next Step

Soft close: "Would it be useful if I showed you what a prep card looks like for one of your real calls?"

Trial close: "The lowest-risk next step is the 14-day trial. No credit card. Upload one doc, run one practice call, and see if the prep card is useful."

7. After-Call Debrief

- Did I earn the right to continue?
- Which question opened the conversation?
- Which objection appeared?
- Where did I talk too much?
- What should I practice before the follow-up?

Want the app version of this card?

Conversation Readiness generates prep cards automatically from your business documents, then lets you rehearse with AI buyers before the real call.

Conversation Readiness — Know what to say before every important conversation. Local-first AI coaching.
Starter \$97, Pro \$197, Agency \$397. 14-day free trial, no credit card.