1. **Confirm Account Essentials:**
   Verify the account size, demographics, funding situation, and how well it aligns with your Ideal Customer Profile (ICP).

   - ☐ Industry and segment: ____________________
   - ☐ Size (employees/revenue): ________________
   - ☐ Geography: ___________________________
   - ☐ Funding / budget insights: _______________
   - ☐ Clear ICP fit? ☐ Yes ☐ No

2. **Map Attendees and Deal History:**
   For the meeting, list all attendees, their roles (Decision Maker, Influencer, User, Approver, Blocker), titles, overseen programs, public priorities, and summarize CRM history (opportunities, notes, objections, timelines, issues).

Name	Title	Role	Programs	Notes

   Past opportunities: ______________________________________
   Key past objections: _____________________________________
   Timelines / decision patterns: _____________________________
   Implementation / support issues: ___________________________

3. **Identify (Likely) Priorities:**
   Review their website and materials for what they say matters most. Find 2–3 specific, measurable priorities/KPIs they likely prioritize.

   Top initiatives mentioned: _____________________________
   Current tools / vendors: _______________________________
   1–2 priority KPIs (e.g., revenue, turnover, efficiency):

   1. ____
   2. ____

4. **Public Signals:**
   Review recent events, board meetings, and news to see what might speed up or slow down the deal.

- ☐ Reviewed recent press releases / blog posts
- ☐ Checked news / announcements (products, hiring, budget, partnerships)
- ☐ Noted major challenges or controversies

Key events / decisions: ____
Possible constraints (timing, budget, politics): _________________

5. **Build a Hypothesis:**
   Turn your research into a simple plan for the conversation.

Hypothesis 1 (what they care most about):

Hypothesis 2 (what might get in the way):
