



1-Page Tool

[Source: adapted from 'Stop Selling & Do Something Valuable', Steve Walmsley, (2007)]

To: _____ From: _____ Subject: _____	Date: _____																		
<u>Preamble</u> 																			
<u>Our Objective for a Meeting</u> 																			
<u>Our Current Understanding of Your Situation</u> 																			
<u>Questions to be discussed during the meeting</u> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Our Questions for You</p> <p>About our Capabilities</p> <p>Your Questions for Us</p> </div> <div style="width: 50%;"></div> </div>																			
<u>Other Areas of Interest to You</u> 																			
<u>Next Action Steps & Timetable</u> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 33%; text-align: center;"><u>Who?</u></th> <th style="width: 33%; text-align: center;"><u>What?</u></th> <th style="width: 33%; text-align: center;"><u>When?</u></th> </tr> </thead> <tbody> <tr><td>1. _____</td><td>_____</td><td>_____</td></tr> <tr><td>2. _____</td><td>_____</td><td>_____</td></tr> <tr><td>3. _____</td><td>_____</td><td>_____</td></tr> <tr><td>4. _____</td><td>_____</td><td>_____</td></tr> <tr><td>5. _____</td><td>_____</td><td>_____</td></tr> </tbody> </table>		<u>Who?</u>	<u>What?</u>	<u>When?</u>	1. _____	_____	_____	2. _____	_____	_____	3. _____	_____	_____	4. _____	_____	_____	5. _____	_____	_____
<u>Who?</u>	<u>What?</u>	<u>When?</u>																	
1. _____	_____	_____																	
2. _____	_____	_____																	
3. _____	_____	_____																	
4. _____	_____	_____																	
5. _____	_____	_____																	