

Prepare the campaign. Keep the next action clear.

Use the workbook to agree your target buyer, prepare the conversation and record follow-up. The working sheets start blank. A separate fictional example shows how to complete them.

Campaign Brief

Complete the nine fields before calling. Agree the offer, companies, buyer roles, evidence, exclusions, meeting standard and sales handoff.

Script Worksheet

Draft the eight conversation prompts. Use a relevant library script as a starting point, then practise the wording and likely responses.

Call Tracker

Log each call attempt. Choose an outcome, set the next action and name its owner. Keep the same Contact ID when calling that person again.

Worked Example

Follow the fictional ERP campaign on the next page. Replace its offer, buyer and assumptions with your own approved information.

Choose the file that fits your workflow.

XLSX: four working sheets, outcome dropdowns and summary counts.

CSV: a plain call log with the same eleven columns.

PDF: these short instructions and the completed example.

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COMPLETED EXAMPLE / FICTIONAL ERP CAMPAIGN

A conversation about the reporting workflow.

Buyer: CFOs at wholesale distributors

Offer: ERP software connecting finance, stock and operations reporting.

Reporting may require manual work across separate systems. Ask how the process works before assuming a problem.

Hi [First Name], [Your Name] with [Company]. We help wholesale distributors bring finance and stock reporting into one system. How are those teams pulling the numbers together today?

Explore the answer

Where does that process still need someone to combine or check information manually?

If the buyer already has an ERP

Understood. Does it give finance the reporting it needs, or is there still work outside the system?

Propose a focused next conversation

Would a focused conversation with our ERP specialist help you assess that reporting workflow?

Record the reporting task, existing approach, relevant people and agreed purpose. Leave budget, integrations and buying timeline open until confirmed.

Use a closer starting point

[ERP cold-call script](#)

[ERP outbound sales playbook](#)

Make every follow-up easy to find.

Enter one row per call attempt. Reuse the Contact ID across attempts so the history stays connected. Choose the most specific outcome, then record the next action, due date and owner.

Call date	The date you made the attempt.
Contact ID	Your stable identifier for the person.
Company, name and role	The account and person you tried to reach.
Phone	The number dialled. Keep phone values as text.
Outcome	Choose one of the seven defined outcomes.
Next action	The specific task agreed or planned.
Due date and owner	When the next action belongs and who owns it.
Notes	Useful context from the call, including any contact preference.

Keep the outcome choices consistent

No answer, Conversation, Callback agreed, Meeting booked, Wrong person, Not a fit, Do not contact.

The summary counts outcome entries in the 200 prepared rows, not unique prospects. Calls logged counts rows with an outcome. The other totals count Meeting booked, Callback agreed and Do not contact. Extend the summary ranges if you add rows.

Open the XLSX in Excel. For Google Sheets, import the workbook and check the dropdowns and summary counts. The CSV contains no formulas or dropdowns.

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