

Prepare a sales meeting with Claude: research, discovery and objection practice

LearnIA - teaching template - 2026-10-14

Use fictional data for the first trial. Adapt this template to your context and verify the result before using it.

Brief to complete

Objective and intended decision :

Audience and context :

Documents, versions and sources :

Constraints and boundaries :

Expected output format :

Information to confirm :

Reviewer :

Starter instruction

Create a prospect brief separating dated sourced facts, hypotheses and unknown information. Suggest five open questions about the current process, main difficulty, success criteria and pilot approval. Then role-play a fictional skeptical prospect. Invent no budget or commitment, and flag promises outside my stated offer.

Quality review

☐ Important facts have dated sources.

☐ Hypotheses are labelled.

☐ Questions do not assume the solution.

☐ Promises stay within the authorized scope.

Verification log

Item	Source or calculation	Result	Correction

Approval and next step

Remaining errors :

Assumptions to resolve :

Retained version :

Next action and owner :

Full tutorial, example and sources : <https://learn-prompting.fr/blog/preparer-rendez-vous-commercial-claude>

This resource prepares a draft; it is not a certification, a grading decision, legal advice or a guarantee of results.