Sales Meeting Summary Template

A summary of a sales call or demo for the deal record: what the buyer cares about, how they reacted, objections, where the deal stands, and the next step to close.

Account	
Deal / opportunity	
Date	
Buyer attendees (name, role)	
Our attendees	
Call type	discovery / demo / negotiation / closing

Summary

2–3 sentences: what happened and where the deal is now.

Buyer priorities

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What we showed or proposed

Shown / proposed	Buyer reaction

Objections

Objection (as said)	Type (price / feature / timing / competitor)	Our answer	Resolved?

Buying process

Decision-maker	
Steps to signature (security review, legal, procurement)	

Target date	
Competitors mentioned	

Next steps

Action	Owner (us / buyer)	Due date

Deal risks

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How to fill it in

- **Objections verbatim.** The exact phrasing tells you whether it's price or something behind price.
- **Map what you showed to their priorities,** not a feature-by-feature list.
- **Leave unknowns blank.** If the decision-maker wasn't named, that's the deal risk — write it under risks.
- **Forecasts are labelled as forecasts.** "Buyer expects to sign in December" is not a commitment.
- **Never record prices or discounts that weren't actually agreed.**