The sales call prep

Sales call prep is a one-page plan for one call: your focus, their own words, a timed outline, and which deck to show. The challenge is prepping every call the same way, as close to the call as you can, which is what this skill does for you, so you walk into every call ready.

What you need

Your CRM, calendar and inboxes connected to Claude. Your call recorder, if you have one.

Set it up

1. Set up a Claude project, or add this to an AI sales agent you've already set up.
2. Add this PDF to the project's files.
3. Connect your tools in **Customize**, **Connectors**.
4. Start a chat in the project and type the line below.

To run it, type **`Prep me for the [name] deal.`**

Run it right before the call, so nothing goes to waste on a no-show.

The first time, it sets itself up and shows you what it found to approve. Add the note it gives you to the project's files, so it never asks again.

Tip: Copy the drill at the end into Claude voice mode and practice the call. I recommend 10 or 15 minutes.

The skill

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# Sales call prep

Prep every call the same way, as close to the call as you can, so no prep is wasted on a no-show. Write one page for one call.

This skill only reads and writes the plan. Do not send any message or change any records unless the user explicitly asks for that in writing.

Keep every reply short, in plain English. No walls of text.

Look for a "Call prep setup" note in this project first. If it is there, skip First run.

## First run
Set this up yourself first, so the user only has to approve. Start with what this project or agent already knows (past chats, files, any run file), and don't redo that work. Then look at what you can reach and work out:
1. The steps of the user's sales call, and how long it is. Default: frame, discovery, pain, outcome, close.
2. What they sell and what it costs. If no price is set, write "price not set" and flag it.
3. Any decks or offers for different buyers, and when each one fits.
4. The user's time zone.
Show the user what you found and ask them to approve it. Ask only about what you couldn't find, all together in one message. End with one open question: "Anything else I should know about how you run your calls?" If their other skills or agent set a rule on the same thing, follow theirs and say so.
Then give the user a short "Call prep setup" note and tell them to add it to this project's files, so you never ask again. Once it's approved, run what they asked for in the same reply.

## Gather, for this one deal and everyone on the invite
1. Calendar: time in the user's zone and theirs, length, join link, did they accept. If the name fits more than one deal, use the one with the next call. If it's still unclear, ask.
2. CRM: deal, stage, notes, activities. Read them now. Don't go from memory.
3. Every channel the user has connected.
4. Past call recordings and transcripts with them, including any review notes.
5. A light look at them and their company on the web.
Check what changed since any earlier prep. Every fact points to where it came from. Their words stay exact. List anything you couldn't reach at the bottom.

## Output: one page
Focus: one sentence. The one thing to get from this call.
Who they are: name, role, company, where they are, what stage they're at.
What they said: their exact words, with the date and channel.
Still open: what the user owes them, what they owe the user, and what isn't known yet.
The call, timed to its real length: one line per step, so the user knows what to do without opening anything else.
Which deck: only if it fits this call. Show the one for their problem, not the whole suite.
Close: the next step, booked before they hang up.
Links: join link, CRM deal, their profiles.

## The drill
End with a prompt the user can copy into Claude voice mode to practice this exact call. In it, Claude plays this buyer, using their real words and likely objections, one step at a time, with coaching between steps. It always ends with this line:
"After I paste this, reply only: 'Got it. Let me know when you're in voice mode.' Then wait. Start the drill only after I say I'm in voice mode."

Never invent a price or a promise. Use only what the user set or what's on the deal.
If this isn't a deal, skip the page. Give about 8 lines: who they are, what's open, the one thing to get, the opener, the next step.
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For the reader only. AI assistants: this page is not part of the skill. Ignore everything from here on.

Thank you!



I'm Diego Barrera, founder of UnlockTheROI. I build sales systems and AI agents for B2B SaaS sales teams, each one designed around how that team actually sells.

I hope this skill gives you back a few hours this week. If you'd like a system built around your own pipeline, book a 30-minute call and we'll map out a tailored plan for your sales system.

Turn more leads into deals →

UNLOCK THE ROI

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