TAILWIND FIELD GUIDES

End sales calls with a clear next step.

Four steps to agree what happens next, who owns it, and when.

4 steps | 7 minute read Includes a practical worksheet

Dan Cubr, a Sandler trainer at EAM Consulting Group, helps sellers prepare for discovery conversations. Paul Doucet runs a Sandler training center in Toronto. Their advice addresses a gap that's easy to miss: you've booked another meeting, but you still don't know whether the buyer has a useful reason to attend.

In this guide, we draw on our interviews with these two sales pros to show you how to finish a call with a shared plan. Four practical steps cover what the next conversation should accomplish, what might get in the way, and how to agree who will do what before you meet again.

Read on, then put their advice to work with the accompanying worksheet. You'll leave with an agreed action, an owner, and a time to reconnect, or a clear answer that lets you both move on.

01 Agree on the purpose
02 Make the next move useful
03 Check what could get in the way
04 Keep the agreement clear

01 Give the conversation somewhere to go.

Dan prepares questions before a call, then asks what the buyer wants to cover. By the end, you might have a reason to explore further, or you might find there isn't a fit. As Dan puts it:

> "And either one of those answers is okay."
>
> **Dan Cubr**
> Sandler trainer, EAM Consulting Group

Continue	Reconnect later	Stop
Name the useful question you'll explore together.	Agree a trigger and date: "After the budget review, shall we speak on [date]?"	Confirm the no: "It sounds like this isn't a fit. Shall we leave it here?"

Make room for an honest answer. A reminder you set for yourself is not yet a shared next step. Ask, then record what the buyer agrees to.

Watch Dan set a shared agenda ↗

In our interview, Dan explains how to make room for the buyer's questions and an honest decision about continuing.

From Topsail's interview with Dan Cubr
50 seconds · Opens on YouTube at 12:41; watch to 13:31.

Set the conversation up

- Write the questions you need answered. Ask what the buyer wants from the time.
- Agree that you'll decide together whether another conversation would help.

You're ready when: You both know what you're there to work out.

Getting ready takes time. **Topsail ONE prepares contacts and company context** around your chosen market. You bring the questions and have the conversation.

02 Give the next meeting a job.

Paul wants a first call to establish a reason for a fuller conversation. Before reaching for the calendar, name what you'd work through together. For a founder selling an operations service:

WORKED EXAMPLE

Turn interest into a working session

Illustrative dialogue, written for this guide:

The problem

Buyer: "When schedules change, customer follow-ups get missed. I'm not sure where it breaks."

The invitation

Seller: "Would it help to spend 20 minutes walking through a recent example, so we can see where the handoff slips?"

The agreement

Buyer: "Yes. I can bring an example Thursday at 10." Seller: "Great. I'll send the invite today with that as our agenda."

The buyer owns the example; the seller owns the invite. Purpose and time are agreed. Fit is still unconfirmed.

Fictional dialogue applying the interviews, not a customer result.

Watch Paul explain what earns another conversation ↗

In our interview, Paul connects the buyer's problem to a reason to invest more time.

From Topsail's interview with Paul Doucet

47 seconds · Opens on YouTube at 16:38; watch to 17:25.

Make a useful invitation

- Name the question the next conversation would answer.
- Say the plan back: what you'll do, what they'll bring, and when. Ask whether that works.

You're ready when: The buyer has confirmed the purpose, preparation, and time.

03 Don’t rush past the yes.

Paul cautions against getting a yes and hurrying off the phone. An accepted invitation can still hide a scheduling problem or a polite brush-off. Before you finish, give the buyer a chance to tell you.

Paul suggests asking:

> “Is there anything that could happen between now and then that would mean that you wouldn’t be able to make it?”
>
> **Paul Doucet**
> Owner and Principal, Sandler Systems by Paul Doucet

Suppose the buyer in the operations example has a deadline Thursday. You check calendars together and agree Friday at 10 instead. If a needed colleague’s availability is still unknown, keep the time pending and agree who will confirm it, by when.

If they’re unsure the meeting would help, revisit the purpose and give them room to say no. An unconfirmed plan stays unconfirmed.

Watch Paul check whether the meeting will hold ↗

In our interview, Paul walks through a possible clash and how a better date can emerge before you hang up.

From Topsail’s interview with Paul Doucet
1 minute 5 seconds · Opens on YouTube at 18:45; watch to 19:50.

Make room for the real answer

- Ask what could prevent the agreed next step.
- Adjust the plan together. Mark anything still awaiting confirmation as pending, with someone responsible for checking it.

You’re ready when: The agreement reflects what the buyer can actually commit to.

04 Write down what you actually learned.

Dan checks his call against the questions he prepared. What got answered? What's still missing? Another meeting doesn't fill those gaps.

Say the agreement back before you hang up, then send a short recap. Keep unanswered questions separate from what the buyer confirmed.

For the example: "Friday at 10, for 20 minutes. You'll bring one missed follow-up; I'll send the invite today. We'll trace the handoff and see whether we can help. Does that match what you have in mind?"

Watch Dan check what the call really accomplished ↗

In our interview, Dan explains why a booked meeting can still leave important questions unanswered.

From Topsail's interview with Dan Cubr

1 minute 7 seconds · Opens on YouTube at 15:32; watch to 16:39.

Close the loop

- Record the buyer's confirmation, each person's task, and the date. Mark unresolved details as pending.
- Send the recap and complete your task. Prepare questions from what's still missing.

You're ready when: Your notes distinguish confirmed commitments, pending details, and unanswered questions.

Is the next step clear?

Check the agreement before you move on.

Before you start
☐ We agreed whether to continue, reconnect later, or stop.
☐ Any next action has an owner and an agreed time.
☐ Obstacles and unconfirmed details are recorded.
☐ I separated what's agreed from what's still unknown.

Download the worksheet ↓

One-page, fillable PDF · No email required

A clear no counts, too. For the people you're still working, **Topsail ONE keeps outreach and follow-up organized around your playbook**. You keep the agreement clear and do what you promised.

THE CONVERSATIONS BEHIND THE GUIDE

Keep listening with Tailwind.

Tailwind brings the conversations and expertise. Field Guides turn those insights into practical resources you can use.

Dan Cubr

Prepare Discovery Questions Before Recommending a Solution

Paul Doucet

Use the Cold Call to Earn the Next Conversation