



## PROSPECT VISIT CHECKLIST

Questions/ Information to uncover	Notes
<input type="checkbox"/> <b>Pre-call plan</b>	
<input type="checkbox"/> <b>Build business rapport</b>	
<input type="checkbox"/> <b>Use transition</b> - <i>we can talk about -----, but I know your time is valuable and I want to make sure we use this time productively.</i>	
<input type="checkbox"/> <b>Confirm time</b> – <i>we had originally put aside _____ for our meeting today, does that still work for you?</i>	
<input type="checkbox"/> <b>Ask for prospects agenda</b> - <i>I know what I was hoping to get out of our time together today. I know your time is valuable. Is there anything specific you were hoping that we were going to discuss today so that we can be as productive as possible? ...use this time effectively? ...got the best bang for our buck?</i>	
<input type="checkbox"/> <b>Set and confirm agenda</b> – <i>What I was hoping to accomplish is to – find out as much about you and your business because ultimately I want to figure out if I have some ideas that might be able to help you out. Does that sound okay to you?</i>	
<input type="checkbox"/> <b>Ask success question</b> - <i>Before we talk about _____, I was wondering, let's just say that we did work together, and it is a year from now and you said that you had a really successful year and we are high fiving each other, what would success look like for you? (It is important to quantify the results)</i>	
<input type="checkbox"/> <b>Ask questions around your needs</b> <i>If you were taking advantage of -----, who other than yourself will be involved in the decision?</i>	
<input type="checkbox"/> <b>Use prefacing phrases</b> <i>Just out of curiosity...</i>	
<input type="checkbox"/> <b>Ask questions about their needs</b>	
<input type="checkbox"/> <b>Use stories to uncover hot buttons</b>	
<input type="checkbox"/> <b>Plant seeds and traps for the competition</b>	
<input type="checkbox"/> <b>Dig deeper into issues or concerns</b>	
<input type="checkbox"/> <b>Trial close</b>	
<input type="checkbox"/> <b>Set up defined next step</b>	
<input type="checkbox"/> <b>Uncover strategic alliances – attorney, CPA</b>	
<input type="checkbox"/> <b>What is the next step that makes the most sense?</b>	
<input type="checkbox"/> <b>Express gratitude for any referrals or additional business</b>	