

# BDU PROSPECT VISIT CHECKLIST

AREAS TO COVER	QUESTIONS TO ASK
<b>PRE-CALL PLAN</b>	Review profile, website, CRM and previous notes for key focus areas and takeaways
<b>BUILD BUSINESS RAPPORT</b>	"I noticed that we both know____, I saw you also studied at____, I saw that you____."
<b>USE TRANSITION</b>	"We can talk about ____ all day, but I know your time is valuable and I want to make sure we use this time productively."
<b>CONFIRM TIME</b>	"We originally set aside ____ time. Does that still work for you?"
<b>ASK THEIR AGENDA</b>	"I know what I was hoping to discuss today. Is there anything specific you want to talk about today so that you feel that we used our time wisely?"
<b>SET AGENDA</b>	"Great! What I was hoping to do was find out as much as I can about you and your business so that I can see if I have some ideas that can help you out. And I will tell you right from the start, if I can't come up with any ideas and don't believe we are a good fit, I will be the first one to let you know. The last thing I would want to do is waste your time. If at any point today or in the future you do not feel we are a good fit, just let me know. Does that sound okay to you?"
<b>ASK SUCCESS QUESTION</b>	"Before we talk about ____, I was wondering...let's just say we did get an opportunity to work together and we are sitting here a year from now. You're saying that you had a successful year and we are high fiving each other. What would that success look like for you?" (Quantify the results)
<b>ASK QUALIFYING QUESTIONS USING SOFTENING PHRASES</b>	<p>"Just so I know, other than yourself who will be involved in making the decision?"</p> <p>"If you don't mind me asking, other than us are you looking at any other alternatives?"</p> <p>"This is obviously an important decision. What is important to you in deciding?"</p> <p>"When were you hoping to get started?"</p> <p>"What is the process that you will need to go through internally to make the decision?"</p> <p>"When are you hoping to make your decision?"</p> <p>"Have you put aside a budget for this?"</p> <p>"Is this a must have or like to have?"</p>
<b>KEY GOALS, PRIORITIES AND INITIATIVES</b>	"What are some of your goals, priorities and initiatives for the upcoming year? What are you doing to address them? What is working/not working?"
<b>CHALLENGES</b>	"What are some of the key challenges that you are facing? How is that affecting your business?"
<b>ASK ABOUT THEIR NEEDS</b>	Use your discovery document to uncover ways that you can help them with your product or service
<b>USE STORIES TO UNCOVER HOT BUTTONS</b>	"One of my clients told me a story about____. Has that ever happened to you?"
<b>PLANT SEEDS AND TRAPS FOR THE COMPETITION</b>	Ask questions about your prospect's perspective on key differentiating areas of your product or service. "A lot of my clients tell me that _____. Is that important to you?"
<b>DIG DEEPER INTO ISSUES OR CONCERNS</b>	"Tell me more... How does that impact you/your business?"
<b>TRIAL CLOSE</b>	"If I can show you a way____, would that be something of importance to you?"
<b>DEFINED NEXT STEP</b>	"Why don't we..."
<b>EXPRESS APPRECIATION FOR THE CONVERSATION</b>	"Thanks so much for taking the time today. I think we got a lot accomplished and I am looking forward to (defined next step)."