

1 - What do we know?

- Detail “what we know” about the prospect
- Highlight “what we don’t know” about the prospect

TOOLS

- Inquiry Form

2 - What do we want know?

- Consider the stages of readiness
- Identify questions you want to ask the prospect

TOOLS

- Sample Questions
- sMART Grid
- Stages of Readiness Guide

3 - Sales History and Stated Objections

- Review “what we’ve done” from the sales journal
- Review “stated objections” from the case study

TOOLS

- Sherpa CRM

4 - Possible Advances and Personalized CFU

- Brainstorm “next steps” that will help the prospect advance
- Select the best advance and delegate responsibility

TOOLS

- Planning for Advances worksheet
- CFU Ideas and Library
- Guide for Home Visits
- Guide for Outreach & Referrals