

FOR IMPACT VISIT FLOW

HOW TO GET TO THE 'PRESENTATION'

IDENTIFY

SOURCES
RATE
RANK
↓
MPL
[Master Prospect List]

PRIORITIZE

- Low-Hanging Fruit
- Momentum/Flywheel
- Access
- Leverage
- 5/5/5 (QPI)
- 5/4/5(QPI)
- Mo-Co/Lead-Co
(Momentum Commitment:
Lead Commitment)

STRATEGIZE

- STRATEGY CHECKLIST
- Relationship Manager
 - Natural Partners
 - GOALS
 - 'HOOKS'
 - IDEAS
- * 3^o (3^o of Separation)

PREDISPOSE

- LETTER w/Enclosure and Endorsement
- N.P./Sales Team Engagement
- * Determine WHO 'sends' and WHO is 'mentioned'
- * Always has this line:
"I have asked (R.M). to follow-up."

PHONE

1. R.M. Direct to Q.P.
2. R.M. to Gatekeeper
3. N.P. to Q.P.

PRESENT

THE VISIT!!!

The REASON
for the
PROCESS

POST-VISIT

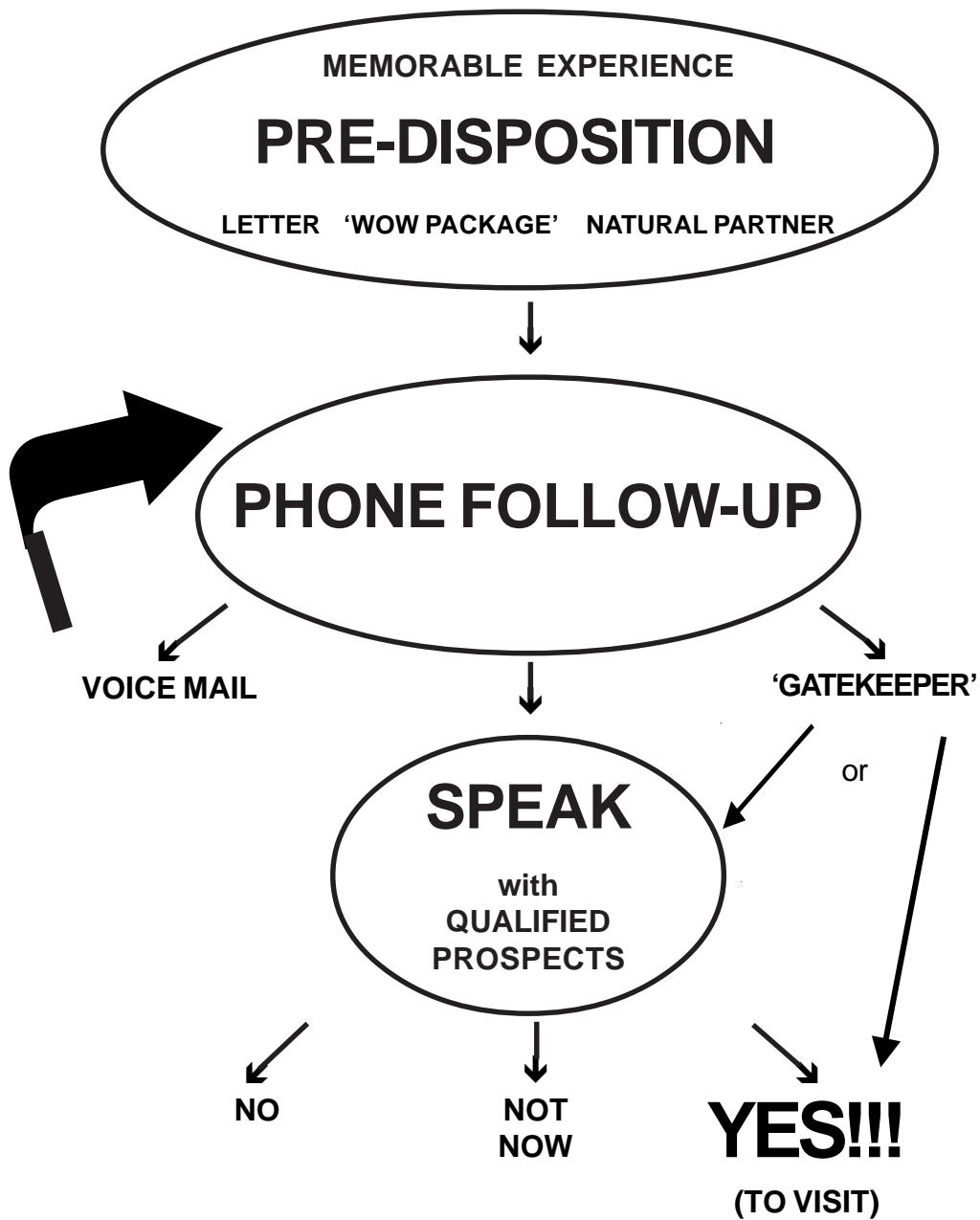
1. CALL REPORT
Discovery/Interest/Action
2. LETTER
Summarize/Customize/Maximize
3. PHONE FOLLOW-UP
Engage N.P.'s as needed.

FOR IMPACT

VISIT FLOW

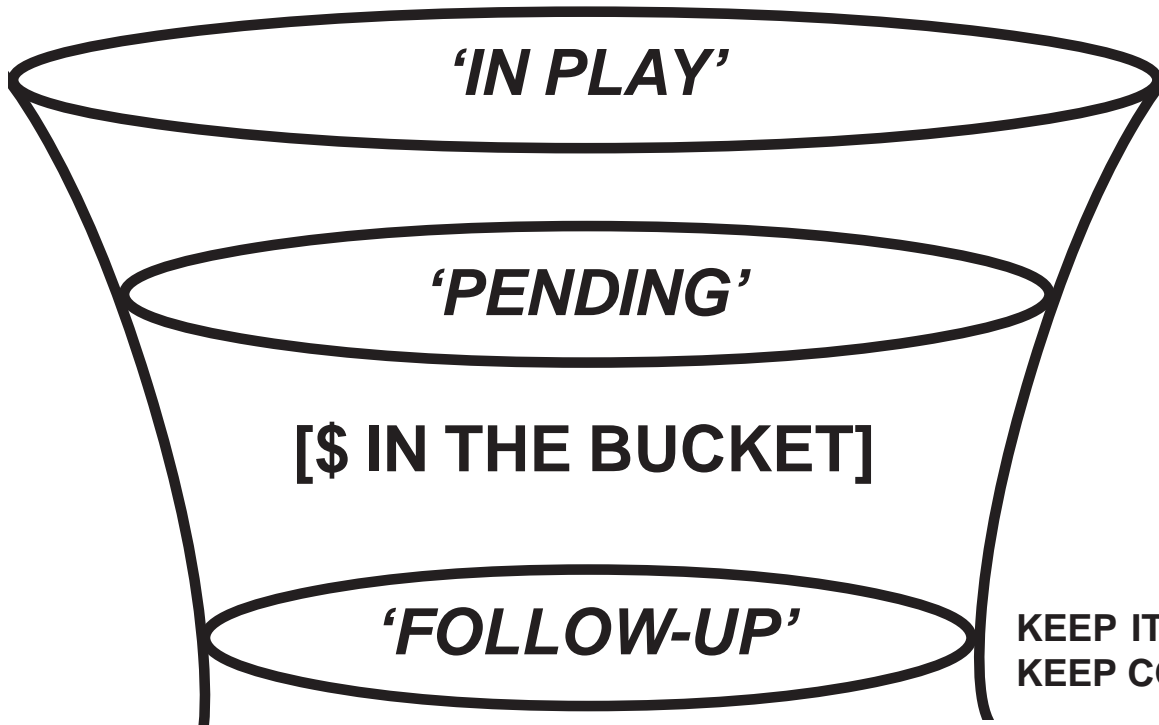
GET YOUR BEST, MOST QUALIFIED PROSPECTS ...

'IN PLAY'!



*After reasonable number of attempts to schedule VISIT ... engage the **NATURAL PARTNER!!**

THE 'SALES FUNNEL'



\$ COMMITMENTS \$
(\$ IN THE BANK)