HOW TO GET A VISIT

**WHO**

- Master Prospect List

**WHAT**

- Memorable Experience

**HOW**

- Phone

1) Relationship Manager or Admin Ast. ➔ Direct to Q.P.
2) Relationship Manager or Admin Ast. ➔ to ‘Gatekeeper’
3) Natural Partner ➔ to Q.P. or Gatekeeper

**Order of Visits:**
- MO-CO: Momentum Commitments
- LEAD-CO: Lead Commitments
- CO-CO: Connector Commitments

**Response Tree:**
- YES ➔
- MAYBE ➔
- NO ➔