

ForImpact

Visit Checklist

Prospect:

R.M.:

Decision Maker:

WHO needs to be there? (*Presentation Team*)

HOW will we predispose for this visit?

WHEN is the best time?

WHAT do we want to accomplish (*Goals*)

WHAT do we need to learn on the visit? (*Discovery*)

WHAT questions can we ask to help us in Discovery and transition toward Goals?

WHERE is the best place for the visit?

Potential Challenges/Objections and Responses:

Flow of the visit:

Engagement Tool for the visit:

Follow-up Plan:

Additional Notes: