

PRESENTATION CHECKLIST

PROSPECT NAME: _____ **R.M.** _____

NATURAL PARTNERS: _____

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

?? **WHAT** ...do we want to accomplish (Goals)

?? **ROI:** (Return On Investment) for this project

?? **POTENTIAL CHALLENGES** (objections) ... and responses

?? **WHERE** ... BEST place for “visit” (Start at our facilities)

?? **HOW** ... will we predispose

?? **WHEN** ... is the best time

?? **FLOW** ... of the visit

?? **PRESENTATION TOOLS** ...

?? **POSSIBLE PROJECT/PROGRAMS** ... (no detail, just overview)

NOTES: