

For Impact

PRESENTATION CHECKLIST

Prospect Name: _____

Relationship Manager _____

Natural Partners: _____

- **WHO** ... needs to be there (Presentation Team)
- **HOW** ... will we predispose
- **WHEN** ... is the best time
- **WHAT**... do we need to learn on the visit (Discovery)
- **WHAT** ...do we want to accomplish (Goals)
- **WHAT**... questions can we ask to help us in Discovery and transition toward Goals?
- **POTENTIAL CHALLENGES** (objections) ... and responses
- **WHERE** ... BEST place for "visit" (Start at our facilities)
- **FLOW** ... of the visit
- **ENGAGEMENT TOOLS** ...
- **POSSIBLE PROJECT/PROGRAMS** ... (no detail, just overview)

NOTES: