

ForImpact

HOW TO GET A VISIT

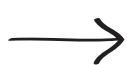
WHO

WHAT

HOW



QUALIFIED PROSPECT



PREDISPOSITION



PERSEVERANCE



Master Prospect List

IDENTIFY
↓
PRIORITIZE
↓
STRATEGIZE

Memorable Experience

~~COLD CALLS~~

GTA (*Grab Their Attention*)
+
CONTACT FROM A NATURAL PARTNER

3°

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 →