



Visit Checklist

Prospect:

Relationship Manager:

Decision Maker:

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

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

Visit MECHANICS:

- **WHERE** is the best place for the visit?
- **WHEN** is the best time?
- **WHO** needs to be there? (*Presentation Team*)

HOW will we predispose for this visit? (*Predisposition Strategy and Actions*)

DECLARE the three A's for the visit:

- **Attitude** (The energy you will bring to the room)
- **Altitude** (People will engage you at the altitude of your choosing)
- **Ask** (If all else fails what is the one thing you can ask that hits your goals?)

FLOW of the visit:

- Determine roles on the visit and designate one 'visit leader'.
- Script the opening/agenda.
- Script questions we can ask to help us in Discovery and transition toward Goals?
- Potential Challenges/Objections and Responses:
- Script the ASK (scenarios)
 - What is the ask? Or what are the asks? (optional/build on the above 'ask')
 - What will you say if the prospect asks, "How can I help?"
 - What will you say if the prospect says, "I can't"
 - Is there a secondary or qualifying ask? (eg. Leadership Circle)



ENGAGEMENT TOOL(S) for the visit:

FOLLOW-UP PLAN:

