

HOW TO GET A VISIT

WHO

WHAT

HOW



QUALIFIED PROSPECT



PREDISPOSITION



PERSEVERANCE



Master Prospect List

Memorable Experience

Phone

IDENTIFY



PRIORITIZE



STRATEGIZE

GTA (*Grab Their Attention*)

Contact from a Natural Partner

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 →