

PrePlan Guide

Created by Continuous Dialog cdialog.com

1. Fundamentals

Company Name _____ Business Type _____

Operation at Site _____

Meeting Goal _____ Min. Objective _____

Rapport _____ Attire _____

Overall Attitude _____

Words Not to Say _____

2. Understanding the Prospect

Prospect's Name, Title	Personality Style	Role in Decision

3. Why Locate Here?

Prospect's Key Drivers	Our Persuasive Evidence

4. Reality Check

Our Key Challenges to Winning	Our Strategies to Minimize, Overcome

5. Decision Process and Timetable

Prospect's Decision Hurdles, Timetable	How We Can Expedite

6. Closing

Words to Say to Close for Commitment

Name of First Closer	
Name of Back-Up Closer	

7. Anticipated Follow-Up Actions and Timetable to Complete

Prospect's	
Ours	