

"No Stress" Prospect Process

The "No Stress" Prospect Process is a smooth and streamlined system for providing stellar, consistent service through every interaction point with prospects. Use this worksheet to help you implement these best practices and identify areas of improvement in your current process.

REMEMBER TO:



1. LEARN MORE CALL

DETAILS

- 15-minute call
- Screen for fit
- Brand messaging
- Seed key messaging
- Share process & invite

WHAT 3 QUESTIONS DO YOU MOST WANT TO ASK A PROSPECT?

2. 1ST MEETING: DISCOVERY

DETAILS

- 75-minute meeting
- Expanded questions
- Clarify needs & goals
- Process walk-through
- Next steps agreement
- Fact finder completed

WHAT ARE YOUR TOP 3 DISCOVERY QUESTIONS?

Ex. "What has your attention right now? Whats on your radar?"





3. 2ND MEETING: PRESENT

DETAILS

- 75-minute meeting
- Present One-Page Plan & recommendations
- Quote Free

WHAT ARE THE TOP THREE MESSAGES YOU WANT TO CONVEY?



4. 2ND MEETING: DECISION

DETAILS

- If no, send closing letter
- If yes, initiate onboarding process
- If maybe, follow 3-strike rule

HOW ARE YOU GOING TO ASK FOR A DECISION AND QUOTE YOUR FEE?
HOW WILL YOU DESCRIBE YOUR SERVICE MODEL?
HOW WILL YOU ADDRESS OBJECTIONS?

