

## TURNING PROSPECTS INTO CUSTOMERS CHECKLIST

Source Name: \_\_\_\_\_

Transaction \_\_\_\_\_ File # \_\_\_\_\_

### 1. SELECT AND CONNECT

- Identify the warm prospect
- Complete introduction phone call
- Connect on social media site(s)

### 2. PRE-SETTLEMENT MEETING

- Schedule and conduct Pre-settlement meeting  
See handout for sample meeting questions

### 3. WEEKLY UPDATES

- Calendar day/time for weekly updates

### 4. POST-SETTLEMENT MEETING

- Schedule and conduct Post-settlement meeting  
See handout for sample meeting questions

### 5. CEMENT THE RELATIONSHIP

- Ask for the order/business
- Confirm the new order
- Confirm a time for follow-up if no order is secured
- Individual cementing - Send personal thank you note
- Team engagement – via phone call, email or handwritten note