

Developing Your Pre-Call Strategy™

Business Name (Prospect)

Name (Producer)

\$ Revenue

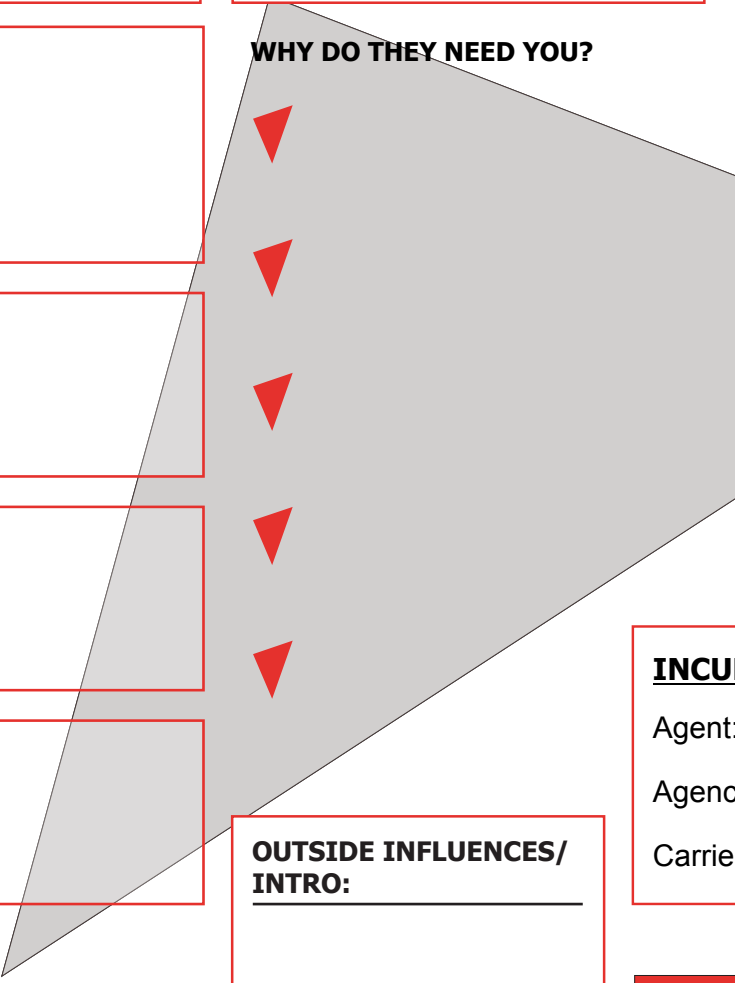
BUYERS
 Name:
 Title:
 Buyer Type:

Name:
 Title:
 Buyer Type:

Name:
 Title:
 Buyer Type:

Name:
 Title:
 Buyer Type:

WHY DO THEY NEED YOU?



PROACTIVE SERVICES	RELEVANCE	THEIR
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		

Complete Proactive Service Comparison List on Next Page.

OUTSIDE INFLUENCES/INTRO:

INCUMBENT
 Agent:
 Agency:
 Carrier:

NOTES

Why does this prospect need you?

What do you do that the incumbent doesn't?

What's missing if they don't have it?

What are the consequences of that?

