

RHSB Prospect Categories

- **“Lead”**

A suspect, a company where you have public data (website) and enough information to believe they are in one of our verticals, are of an appropriate size and the buying decision is made locally

- **“Account”**

Prospect where you have done some research, completed a POSI, and will schedule or have completed an initial meeting

- **“Opportunity”**

Set up after an initial meeting on a prospect where you have confirmed that the account meets the following criteria:

- ✓ In one of our verticals where we have expertise, reputation, markets, etc.
- ✓ Size and location - large enough with the buying decision makers located in the DFW metroplex - or at least Texas
- ✓ Some issue, opportunity, ability to develop a coach, change of personnel, negative experience with a claim, have outgrown their current broker, feels the need to make a change, going into a new market, product line, expanding internationally, etc.