

## Initial Meetings with Prospects Checklist

Solution Development – Will the solution?	Yes	No
1. Support the direction and priorities of the prospect’s business?		
2. Address the prospect’s identified risk management and insurance needs?		
3. Satisfy the prospect’s decision criteria for broker and insurance program selection?		
4. Add unique value that differentiates your agency from competition?		
5. Reduce the prospect’s total cost of risk?		
6. Deliver an acceptable return on the prospect’s investment?		

Presentation Development – Does the presentation?	Yes	No
1. Use language your audience will understand?		
2. Communicate information in a clear and well-organized manner?		
3. Look professional including use of correct grammar and spelling throughout?		
4. Address the topics and needs that are of greatest interest to the prospect?		
5. Demonstrate sound understanding of the prospect’s industry and business?		
6. Highlight the few things about your agency that are most important for this prospect to remember?		
7. Link your proposed solution to the prospect’s identified needs, priorities and plans?		
8. Include evidence to back your claims (past results, case studies, client testimonials, etc.)?		
9. Make an effective case for change?		
10. Provide an appropriate level of detail neither too much nor too little?		
11. Close with action steps and a timeline for moving forward?		
12. Fit the time available to present it?		