

Initial Meeting Pre-Call Plan

Business Name:

Individual Name:

Title/Role:

Meeting Date:

Meeting Time:

Source of Prospect:

Prospect Summary – Highlights of what you've learned about this prospect in each area and the information sources you used.

Industry:

Company:

Key players:

Insurance/risk profile:

Information sources:

Meeting Objective:

Planned Questions – Key questions you want to ask to understand and qualify this prospect

Business questions about the company:

Individual questions about key players:

Risk management and insurance questions