

Initial Meetings with Prospects Checklist

Producer Assessment

<i>Did the producer?</i>	<i>Yes</i>	<i>No</i>
1. Open the meeting effectively including confirming time scheduled and the purpose of the meeting?		
2. Spend more time asking and listening than telling and talking?		
3. Sequence and phrase questions to encourage the prospect to openly share information?		
4. Ask follow-up questions to keep the meeting conversational?		
5. Share appropriate type and amount of information about your agency?		
6. Handle questions from the prospect effectively?		
7. Set clear and appropriate next steps at the end of the meeting?		

Prospect Assessment

1. Is this an appropriate prospect to continue pursuing and why?
2. What is the opportunity?
3. How qualified is it?
4. When and how will you engage other team members in the agency with this opportunity?