

Prospecting Plan

Producer:

Plan Period:

Target Prospect Profile – List key characteristics of desired accounts.

Centers of Influence – List Centers of Influence (COI) both where you already have relationships and new ones you want to develop. For each COI, identify your action steps and timeline for building and leveraging this relationship and the resulting flow of prospects.

COI	Action Steps	Timing

Networking Opportunities – List the Networking opportunities you believe will be most productive for you. Identify your action steps and timeline for developing and capitalizing on each of these networking opportunities.

Networking Opportunity	Action Steps	Timing

Other Prospect Sources – List the other Prospect Sources you will use to identify prospects and build your first Prospect Lists.