



# **Gamification Agent Sales Action Plan**

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## **FIVE STEPS TOWARD ACCELERATING YOUR PRODUCTIVITY**

What is productivity? With all the surrounding buzz, the concept of “productivity” often sounds like white noise lacking any useful meaning. However, for SplashPlay Game Consultants in our fast-paced mobile arena, productivity could not be more critical for success. The simple fact is most sales professionals fail simply due to a lack of one thing — *Productivity*.

Very simply, **productivity means getting more done with less**. Committing to being productive is committing to a concerted effort to **stay focused on relevant priorities**. Basically, avoiding distractions. As a SplashPlay Gamification Agent, the best time to think through your sales processes and identifying “*what works*”, “*what doesn’t work*” and “*what needs to be improved*” **is right now**.

In SplashPlay’s Gamification Agent Sales Action Play, we shall first share insights into what works and how to achieve your goals. To begin, let’s us explore five steps you can take immediately to prioritize what really matters to get more done in less time. Basically, being more productive.

### ***1. Prioritize your relationships***

Productivity starts with a weekly checkup. As a SplashPlay Gamification Agent, you will play a variety of roles including CEO, Marketing Director, VP Sales, etc. Also, let us not forget that you have a life outside of SplashPlay where you are a husband/wife, father/mother, son/daughter, brother/sister and friend. To keep track of all your roles, it’s a good idea to keep a running list and on Sunday night or Monday morning write down one thing you must do that week to ensure your various roles are kept in perspective. Doing so will help you to see the big picture of your priorities as they relate to the relationships most important in your life. Doing so, is the essence of productivity.

### ***2. Make your priorities actionable***

Before looking at your overflowing inbox or getting lost in the daily grind, set aside time at the beginning of each week to prioritize your to-do list. Toward this end, be sure to **create action items for each task**. The more granular, or detailed, the better. If there’s anything time contingent, add the task to your calendar. Add everything else to a larger running to-do list. This will help you move through your days with intention rather than constantly playing catchup and questioning what should come first. Basically, stay in control of your calendar.

### ***3. Be strategic with your schedule***

To begin, commit to scheduling your time strategically. Certainly, easier said than done, right? Perhaps. However, when successful people are surveyed, they all agree that organized commitments – often called “time blocking” results in peak performance. Time blocking is a method that has proven to result in **150% increase in productivity**. When time blocking, the most pressing items on your list are always scheduled first thing in the morning, when you can give your full focus and attention. Tactical items (the ones that need to get done but require less focus) can be deferred to the afternoon.

### ***4. Protect your time***

Whether you use ***Google Calendar*** or like to kick it old-school with pen and paper, get serious about protecting your time. However, if you are eager to be more productive and willing to embrace technology, services such as ***Calendy*** for your appointment scheduling can be truly empowering.

Calendy's interface is smooth and integrates seamlessly with Google Calendar and Office 365 so you never get double-booked or overcommitted. Here is a hint: *Before accepting an invitation for a meeting ask yourself if the time spent will get you closer to your weekly goals.* Be sure to schedule clear work-blocks to tackle your biggest and most important priorities – then guard them as if your life depended on it

### ***5. Get rid of the old***

Author Jocelyn K. Gleib says it best, “Productivity is really what you don’t do.” One of the most critical aspects of working efficiently revolves around getting rid of activities and processes that **no longer work for you**. To achieve this objective, simply make a list of the processes, tools and habits that have proven not to work and set up a strategic game plan for eliminating them. Again, this plan needs to be actionable. As such, simply set measured goals and completion dates right from the start.

In summary, ask yourself a simple question: “What does being productive mean to me?” The answer is simple. Productivity means prioritizing everything that matters in order to live a fuller life, realize efficiencies and achieve goals – basically, enjoy a more balanced life. Toward this end, being laser-focused will keep you calm, in control, and keep your goals within reach.

## ACTION PLAN FOR A SUCCESSFUL SALES CALL

With your action plan in place for becoming more productive, let's dive into the steps necessary to achieve your financial goals with SplashPlay. Toward this end, we have assembled a well proven process, divided into ten easy steps, used by effective sales professionals across every industry. If followed, SplashPlay's Success Action Play, illustrated below, will ensure SplashPlay's Gamification Agents easily and efficiently make the contacts needed to be successful.

Following SplashPlay's simple, systematized ten-step targeting plan, your effort developing effective referral sources, preparation for the appointment, and the appointment will help you keep your efforts focused and on track. When you follow this concise plan, and assemble the tools we describe, you will not waste a single moment or lack direction. The fact is, you will know exactly what to do next, your confidence will soar and results will be achieved. Making sales calls will become exciting opportunities ensuring your success as a SplashPlay Gamification professional. **ALL THE FORMS DESCRIBED IN THIS SECTION CAN BE FOUND IN THE APPENDIX.**



### ***ACTION STEP 1: Be Strategic...Identify Top 10 SplashPlay Gamification Candidates to Target***

Start by selecting ten gamification partners with whom you would like to develop new relationships with, such as restaurants, veterinarians, museums, churches, schools, realtors, or business owners you wish to approach about SplashPlay. Note the business category, write a robust description and a short explanation as to why you wish to approach this category.

| TARGET BUSINESS TYPES       |  |
|-----------------------------|--|
| Target Business Description | Business Category  |
| 1                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 2                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
|                             | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |

### ***ACTION STEP 2: Create a list of sources from whom to ask for referrals***

Now choose several of your top clients, current business partners, even family and friends to ask for seven personal introductions to potential Gamification Sponsors. Knowing that people tend to refer others who are somewhat like themselves, choose these sources carefully. This is a unique opportunity to accelerate your business development process and present SplashPlay to friendly and receptive potential customers. Creating prospect referrals is a full-time commitment to your success. That said, the world's greatest sales professionals all stress the importance of soliciting referrals. In fact, once you have secured a new client, it is important to ask him or her for a few referrals.

| Prospect Referrals                          |  |
|---|--|
| Referral Source                             |  |
| Prospective Partner Names and Phone Numbers | Business Category  |
| Name: _____<br>Phone Number: _____          | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| Name: _____<br>Phone Number: _____          | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| Name: _____<br>Phone Number: _____          | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |

**ACTION STEP 3: Prepare Your “Target Customer Packets”**

The grid, illustrated below, will keep your efforts focused. To begin, fill in the top row of the grid with your target customer categories. Fill in the left-most column with your referral sources that you have selected to approach for potential recommendations for your target customers.

|                  | Target Customer Categories |         |         |               |             |       |
|------------------|----------------------------|---------|---------|---------------|-------------|-------|
| Referral Sources | Churches                   | Schools | Museums | Art Galleries | Sports Bars | Clubs |
| Dave Richards    |                            |         |         |               |             |       |
| Dad              |                            |         |         |               |             |       |
| Farther Tim      |                            |         |         |               |             |       |
| Grant Roberts    |                            |         |         |               |             |       |

Your target packets will include Target Customer Information Sheet, “magic question” appointment sheets and a blank note card. Rest assured, if your files are created with these items in advance, the more quickly and efficiently you will be able to approach your targets customers. When your tools are prepared and right at hand, your efforts are much less likely to fall off track.

**Target Customer Information Sheet**

Referred by: \_\_\_\_\_

Why Referred: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Organization Category: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Role: \_\_\_\_\_

Address: \_\_\_\_\_

Web Address: \_\_\_\_\_

Email: \_\_\_\_\_

**Magic Questions**

1. Have you been successful with Social Media Marketing?
2. Do you wish to benefit from the up mobile technology?
3. Do you feel like you are in step with trends in mobile customer experience?

Blank note card with horizontal lines.

**ACTION STEP 4: Start Making Calls to Your Referral Sources**

Your next step is to complete as much of the Target Customer Grid as possible by contacting your list of referral sources. When contacting these individuals, let them know that you “*selected them because you respect and value their opinion, and you would like the opportunity to work with others who are like them. Do they know someone whom they believe would be interested in SplashPlay and would they recommend them to you?*”

|                  | Target Customer Categories |            |                 |                    |                    |                      |
|------------------|----------------------------|------------|-----------------|--------------------|--------------------|----------------------|
| Referral Sources | Churches                   | Schools    | Museums         | Art Galleries      | Sports Bars        | Clubs                |
| Dave Richards    |                            |            |                 | Modern Art Gallery |                    | Model Railroaders    |
| Dad              |                            |            | USS Midway      |                    |                    |                      |
| Farther Tim      | St. Marks                  | St. Mary's |                 |                    |                    | Southern Fly Fishers |
| Grant Roberts    |                            |            | WWII Air Museum |                    | Dave's Sports Stop |                      |

Be sure to ask WHY they would recommend them, and use the Target Customer Information Sheet to track all the data you are gathering about this potential new SplashPlay customer.

In addition to beginning to develop a warm list of new targets to approach, this technique also yields several additional benefits. Even if your selected source is not immediately able to make any recommendations, they will be exceptionally flattered that you value their opinion so highly. Also, if they can make some recommendations but not round out the entire list, (i.e.: creating a “hole” in the grid) they have provided you with a potential opportunity to refer one of your valued business partners to them. Reciprocity is a compelling motivator.

***ACTION STEP 5: Prepare for the approach***

Research your target customer fully. Use the Target Customer Information Sheet and start a Potential Customer file with the information you have been provided by the person referring them. Also, look at their website and research online for any additional information you can find that will enhance the selling process. Your advance knowledge of your potential customer will immediately set you apart from the competition, and allow you to ask more effective and probing questions at during the appointment.

***ACTION STEP 6: Put Your Approach Plan into Action***

**• START BY SENDING A NOTE OR EMAIL TO YOUR TARGET CUSTOMER:**

- Idea: *John – just wanted to drop a quick note to introduce myself. Bob told me great things about you, and hope we might have the opportunity to meet sometime soon. Best wishes - Joe Turner*

**• A FEW DAYS LATER, LEAVE A MESSAGE:**

- Try something like this: *“Hi, this is Joe Turner from SplashPlay. I hope you received the message I sent a few days ago. You know, Bob Davis has told me a little bit about you, and based on what Bob shared with me, I think it’s possible that we would be a good fit for doing business together. I’d really like the opportunity to meet with you for a few minutes to see if you might feel the same way. I’ll call you back to follow up in a few days – look forward to speaking with you!”*
  - This is much more effective when left as a message, rather than getting the person on the phone at this point. Don’t be afraid to block your number or call from a line where your number/name will not show on caller ID, and claim “wrong number” if they answer!

**• FOLLOW UP SHORTLY WITH A “PERSONAL TOUCH”:**

- IDEAS – *small books or a Starbucks gift card are great ideas, as people are always flattered to receive a gift, and they will not get thrown away. You can write a small personal note right in the book, such as “I enjoyed this book, thought you might as well – Best Wishes!” and be sure to include your business card.*

**• MAKE ANOTHER CALL AND ASK FOR THE APPOINTMENT**

**ACTION STEP 7: Prepare for and Conduct the Appointment**

- 1) Confirm in advance how long you will be there, and at the appointment, verify that they still have the time to meet with you for that time. Doing so confirms that you respect their time and you want to confirm that they are still able to meet for the time that you had scheduled with them. This will put them at ease, knowing that you are not planning to stay for the day. Never overstay your predetermined time, they can always ask you to stay longer.
- 2) Make sure that you do have something very brief prepared to share about yourself, such as a success story on how you helped a client recently or why you are with SplashPlay. Remember, by inviting you into their office, they know why you are there. DO NOT spend time selling yourself, instead – let them know that you are there because you know a little bit about them and want to learn more as you feel that you might be a great asset to their business. This also lends an “exclusive” feel to your services, making you more desirable to your target.
- 3) Ask them if it is OK to take notes while you talk. The nice side effect of using the interview technique described below is that it also helps to eliminate the normal sales call jitters.

**ACTION Step 8: Develop Your Own List of Magic Questions**

What we call Magic Questions allow you to customize your presentation to the unique needs of the prospect. As such, have your own “magic questions” prepared in advance, and make up an interview sheet like the one found below to have ready for your meeting. Make sure you ask the questions in a conversational manner, and ad lib as needed. Don’t read the questions as if they are a test.

Here are some ideas for Magic Questions you can use:

- Have you been successful with your Social Media efforts?
- Do you wish to take advantage of the growing mobile marketplace?
- Do you feel that your organization is in step with the current trends in gamification?
- Do you have a loyalty program in place?
- Do you have information that is constantly changing you wish your constituents to be aware of?
- Are you interested in a solution that requires no technological skills or commitment to technology?
- What kinds of change or growth do you see in your business?
- What are your top priorities in Social Media?
- Would SplashPlay work directly with you or is there someone in the organization that will take the lead?
- What are your top five goals for your organization?

Use the questions you have selected from above, or your own to prepare a sheet like the following that you can bring with you into your meeting.

*Magic Questions*

|                    |  |
|--------------------|--|
| Organization Name: | Riverside Military Museum                                |
| Contact Name:      | David R. Johnson, Executive Director                     |
| Question 1:        | Have you been successful with your Social Media efforts? |



Remember that these are to be used as a guide - usually the discussion will go its own way. Don't feel like you must follow a particular order or even get through all of your questions. One of the primary purposes of bringing this sheet is so that you can listen more effectively. You don't want to be so worried about what you will say next that you can't really hear what prospect is saying.

Remember that this is a discussion, not a sales pitch. Listen to their answers carefully, and learn as much as you can. Ask follow up questions on points they bring up that you find interesting. Remember that everyone's favorite topic is: THEMSELVES. Let them do the talking. Again, they know why you are there. **You are most interesting to someone when you show them that you are interested in them!**

You will have some brief information prepared as discussed above to share about yourself, but don't be afraid to tell your prospect that they have given you much to think about, and you would like to get back to them with an action plan for how SplashPlay will work for them.

***ACTION STEP 9: Follow Up***

Always follow up with a handwritten note or email, thanking them for their time. Review your notes in detail, and determine if this target prospect is indeed a good match as a SplashPlay Game Sponsor. If so, follow up with a plan for how you feel that you can work best together. How you take this step will be very individual, depending on the nature of the prospect's business and the meeting. For example, if your prospect is the Executive Director of a museum, illustrate how the museum's robust content can be made more interesting, engaging and available to the museum's patrons and supporters in addition to providing a new and lucrative source of capital.

Keep a file, or cheat sheet, on EVERY prospect you meet that contains your notes from this meeting, illustrated here and available in the appendix.

Additionally, add collect significant information you gain over time – spouses name, hobbies and interests, birthday, etc. and add it to your contact to your database, and include them in your ongoing marketing plans throughout the year.

The form is titled "Sales Call Follow-Up" and is designed for tracking information from a sales call. It contains four main sections:

- Organization Name:** A rectangular text box for recording the name of the organization.
- Contact Name:** A rectangular text box for recording the name of the contact person.
- Decision Makers:** A rectangular text box for recording the names of decision makers.
- Thoughts about Appointment:** A larger rectangular text box for recording notes and thoughts regarding the appointment.

The form has a decorative, torn-edge bottom border.

***ACTION STEP 10: Believe in Yourself and the Power of having a Plan***

The old sayings, "Plan your work and work your plan" is never more true than in sales. The simple fact is, building customer relationships will come from commitment to the strategy laid out in this document. Our best suggestion to you is to repeat this plan often and follow the steps diligently. In doing so, you will realize immediate and tangible results. Never forget to reward yourself for your success, both in executing an effective plan and securing profitable business relationships.

**SUCCESS!**

**APPENDIX**  
**Forms**

## Target Business Types

### TARGET BUSINESS TYPES

| Target Business Description | Business Category  |
|-----------------------------|--|
| 1                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 2                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 3                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 4                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 5                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 6                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 7                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 8                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 9                           | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |
| 10                          | <input type="checkbox"/> Restaurants <input type="checkbox"/> Charities <input type="checkbox"/> Churches<br><input type="checkbox"/> Museums <input type="checkbox"/> Schools <input type="checkbox"/> Authors<br><input type="checkbox"/> Healthcare <input type="checkbox"/> Artists <input type="checkbox"/> Business<br><input type="checkbox"/> Other: _____ |

*Prospect Referrals*

# Prospect Referrals

|                        |
|------------------------|
| <b>Referral Source</b> |
|------------------------|

| Prospective Partner Names and Phone Numbers |  | Business Category                     |                                    |                                   |
|---|--|---------------------------------------|------------------------------------|-----------------------------------|
| Name  |  | <input type="checkbox"/> Restaurants  | <input type="checkbox"/> Charities | <input type="checkbox"/> Churches |
| Phone Number                                |  | <input type="checkbox"/> Museums      | <input type="checkbox"/> Schools   | <input type="checkbox"/> Authors  |
|   |  | <input type="checkbox"/> Healthcare   | <input type="checkbox"/> Artists   | <input type="checkbox"/> Business |
|   |  | <input type="checkbox"/> Other: _____ |                                    |                                   |
|   |  |                                       |                                    |                                   |
| Name  |  | <input type="checkbox"/> Restaurants  | <input type="checkbox"/> Charities | <input type="checkbox"/> Churches |
| Phone Number                                |  | <input type="checkbox"/> Museums      | <input type="checkbox"/> Schools   | <input type="checkbox"/> Authors  |
|   |  | <input type="checkbox"/> Healthcare   | <input type="checkbox"/> Artists   | <input type="checkbox"/> Business |
|   |  | <input type="checkbox"/> Other: _____ |                                    |                                   |
|   |  |                                       |                                    |                                   |
| Name  |  | <input type="checkbox"/> Restaurants  | <input type="checkbox"/> Charities | <input type="checkbox"/> Churches |
| Phone Number                                |  | <input type="checkbox"/> Museums      | <input type="checkbox"/> Schools   | <input type="checkbox"/> Authors  |
|   |  | <input type="checkbox"/> Healthcare   | <input type="checkbox"/> Artists   | <input type="checkbox"/> Business |
|   |  | <input type="checkbox"/> Other: _____ |                                    |                                   |
|   |  |                                       |                                    |                                   |
| Name  |  | <input type="checkbox"/> Restaurants  | <input type="checkbox"/> Charities | <input type="checkbox"/> Churches |
| Phone Number                                |  | <input type="checkbox"/> Museums      | <input type="checkbox"/> Schools   | <input type="checkbox"/> Authors  |
|   |  | <input type="checkbox"/> Healthcare   | <input type="checkbox"/> Artists   | <input type="checkbox"/> Business |
|   |  | <input type="checkbox"/> Other: _____ |                                    |                                   |
|   |  |                                       |                                    |                                   |
| Name  |  | <input type="checkbox"/> Restaurants  | <input type="checkbox"/> Charities | <input type="checkbox"/> Churches |
| Phone Number                                |  | <input type="checkbox"/> Museums      | <input type="checkbox"/> Schools   | <input type="checkbox"/> Authors  |
|   |  | <input type="checkbox"/> Healthcare   | <input type="checkbox"/> Artists   | <input type="checkbox"/> Business |
|   |  | <input type="checkbox"/> Other: _____ |                                    |                                   |
|   |  |                                       |                                    |                                   |
| Name  |  | <input type="checkbox"/> Restaurants  | <input type="checkbox"/> Charities | <input type="checkbox"/> Churches |
| Phone Number                                |  | <input type="checkbox"/> Museums      | <input type="checkbox"/> Schools   | <input type="checkbox"/> Authors  |
|   |  | <input type="checkbox"/> Healthcare   | <input type="checkbox"/> Artists   | <input type="checkbox"/> Business |
|   |  | <input type="checkbox"/> Other: _____ |                                    |                                   |

*Pre-Sale Action Grid*

|                  |  | Target Customer Categories |  |  |  |  |  |
|------------------|--|----------------------------|--|--|--|--|--|
| Referral Sources |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |
|                  |  |                            |  |  |  |  |  |

## Target Customer Information Sheet

|                        |               |                |              |
|------------------------|---------------|----------------|--------------|
| Referred by:           |               |                |              |
| Why Referred:          |               |                |              |
| Organization Name:     |               |                |              |
| Organization Category: |               |                |              |
| Contact Name:          |               | Role or Title: |              |
| Address:               |               |                |              |
| Web Address:           |               |                |              |
| Email:                 |               |                |              |
| Phone Numbers:         | <b>Office</b> | <b>Home</b>    | <b>Cell</b>  |
|                        |               |                |              |
| Assistant's:           | <b>Name</b>   | <b>Phone</b>   | <b>Email</b> |
|                        |               |                |              |

|                                       |                      |
|---------------------------------------|----------------------|
| <b>PERSONAL INFORMATION</b>           |                      |
| <b>Date of Birth</b>                  | <b>Spouse's Name</b> |
|                                       |                      |
| College Attended:                     |                      |
| Children's Names & Ages:              |                      |
| Interests, Hobbies and Special Notes: |                      |
| Information from Other Sources:       |                      |

|                                  |                                    |  |
|----------------------------------|------------------------------------|--|
| <b>EVENT TRACKING</b>            |                                    |  |
| Note Card Sent (Date and theme): | Phone Call for Appt. (Date):       |  |
| Follow-up Message Left (Date):   | Appointment Made (Date/Time):      |  |
| Personal Touch Sent (Date):      | Thank You Note to Referral (Date): |  |
| What I sent:                     | Congratulate Myself for Success:   |  |

## ***Sales Call Follow-Up***

|                    |  |
|--------------------|--|
| Organization Name: |  |
| Contact Name:      |  |
| Decision Makers:   |  |

|                             |  |
|-----------------------------|--|
| Thoughts about Appointment: |  |
|-----------------------------|--|

|                   |  |
|-------------------|--|
| Prospect's Needs: |  |
|-------------------|--|

|                      |  |
|----------------------|--|
| Prospect's Concerns: |  |
|----------------------|--|

|                                       |  |
|---------------------------------------|--|
| Thoughts about working with Prospect: |  |
|---------------------------------------|--|

|               |  |
|---------------|--|
| Action Items: |  |
|---------------|--|

## ***Magic Questions***

|                       |  |
|-----------------------|--|
| Organization<br>Name: |  |
| Contact<br>Name:      |  |

|             |  |
|-------------|--|
| Question 1: |  |
|             |  |

|             |  |
|-------------|--|
| Question 2: |  |
|             |  |

|             |  |
|-------------|--|
| Question 3: |  |
|             |  |

|             |  |
|-------------|--|
| Question 4: |  |
|             |  |

|             |  |
|-------------|--|
| Question 5: |  |
|             |  |