PROSPECT CALL COMPASS

NAVIGATE YOUR WAY THROUGH A PROSPECT CONVERSATION

PRE-CALL NAVIGATION: PROSPECT-RELATED POINTERS

- Qualify your prospect using one of three methods:
  - Exchange Estimates
  - Quick Questions
  - Rapid Review
- Set up the call
  - Send the meeting link
  - Specify the time zone
  - Specify the duration of the call
  - Specify whether it's a voice call or a video call

PRE-CALL NAVIGATION: PERSONAL POINTERS

- Research the prospect
  - LinkedIn profile
  - Instagram profile
  - Personal website
  - Company website (etc)
- Prepare your notes
  - Prepare your offer for the prospect
  - Prepare your recommendations for the prospect
  - Prepare a list of questions
  - Prepare answers for possible questions or objections
  - Keep your PayPal link or Stripe link or UPI link handy
- Get ready for the call
  - Connect the laptop to the charger (and turn it on!)
  - Notepad + pen
  - Calculator (to calculate fees for customised offers)
  - Glass of water

ON-CALL NAVIGATION

- Greet the prospect
- Introduce yourself
- Ask questions
- Explain how you work
- Pitch your offer
- Quote your fees
- Share your terms & conditions
- Answer any questions or objections
- Get a response - Yes or No
- Get paid on the call (Or send an invoice later)

POST-CALL NAVIGATION

- Send a proposal or contract
- Send an invoice and get the advance payment (if not paid on call)
- Proceed with your usual onboarding process.

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