Prospect Process

Use the following information to help find the right client(s) for you.

Stage 1: Fit Call

(30-40 Minutes)

- [ ] **FORMAT**

  - Informal phone call

- [ ] **GOAL**

  - The goal of the call is to point them in the right direction. Whether that be with us, or another firm, we can refer them to. The goal is to find the right fit for who can best serve them.
  - Aim to spend 75% of the time with them answering questions

- [ ] **PROSPECT SITUATION**

  - What is happening in their lives that made them reach out now?
  - Understand who they are: life stage, family, career, challenges, assets, liabilities, etc.
  - What is their experience with the industry?

- [ ] **SERVICE OFFERING**

  - Explain our process and the approximate costs
  - Answer any questions

- [ ] **DISCUSS IF WE ARE A MUTUAL FIT**

  - If so, ask if they wish to proceed to the next stage, meeting with the spouse (if one exists) or to be referred out.
  - If not, refer to a colleague with a business model that is a fit.

Stage 2: Welcome (Pitch) Meeting

(45-90 Minutes)

- [ ] **FORMAT**

  - In-person or zoom meeting with both spouses as applicable

- [ ] **PROSPECT SITUATION**

  - Spouse answers all of the above
  - The person from the first call asked about anything they wanted to add from the last call.

- [ ] **PITCHBOOK PRESENTATION**

Stage 3: Validation

- Supporting materials and work samples are either pulled up in the meeting and/or forwarded if requested.
- If desired, an introduction to an existing client with a similar personal situation is made to act as a reference.

Stage 4: Implementation

- Once the prospect has confirmed, they are moving forward
- PreciseFP questionnaire sent
- Invoice sent

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