CLIENT ACQUISITION SERIES – MODULE 1

Leader's Guide

Module 1

Pre-Call Planning

Client Acquisition Series
Module 1: Pre-call Planning

Objectives: Become familiar with various prospecting systems and design your own pre-call planning process

Workshop Time: 3 hours

Seating Arrangements: If possible, sit in table groups of 4-6 in a room that has a computer for each person to move to during case studies.

Resources Needed:

- Participant Guides
- Computers with access to various prospecting systems for each participant
- Flip chart paper and markers

Agenda at a Glance

Topic	Time Allotted
Welcome / Overview of Client Acquisition Series	5 min
Objective / Agenda	5 min
Introductions	3 min
Prospecting Tools	20 min
Case Study #1 - Partner Activity	30 min
Case Study #2 - Individual Activity	30 min
Pre-Call Planning Process Example	10 min
Break	10 min
Create Your Own Process - Individual Activity	20 min
Putting it all Together - Table group activity	25 min
Bridge to Out-Bound Calling class	5 min
SMART Goal Setting	10 min
Post-Training Expectations	5 min
Conclusion	2 min

Welcome / Overvieww of Client Acquisition Series (5 minutes)

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Pre-call Planning Objective (5 minutes)

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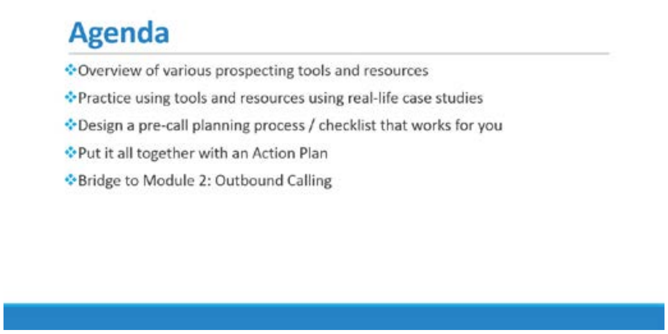
Workshop Agenda (2 minutes)



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Introductions (3 minutes)

Slide 6

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