



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)

PRE-CALL PLANNING

CLIENT ACQUISITION SERIES – MODULE 1

Slide 1

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Client Acquisition Series

- ❖ Module 1: Pre-Call Planning
- ❖ Module 2: Outbound Calling
- ❖ Module 3 : Building Rapport/Centers of Influence
- ❖ Module 4 : Discovering Needs
- ❖ Module 5: Presenting Solutions
- ❖ Module 6: Overcoming Objections/Closing the Sale
- ❖ Module 7: Partnership Selling
- ❖ Module 8: Sales Coaching for Managers



Slide 2

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Pre-call Planning Objective (5 minutes)

Client Acquisition Series

- ❖ **Module 1: Pre-Call Planning**
- ❖ Module 2: Outbound Calling
- ❖ Module 3 : Building Rapport/Centers of Influence
- ❖ Module 4 : Discovering Needs
- ❖ Module 5: Overcoming Objections
- ❖ Module 6: Closing the Sale
- ❖ Module 7: Partnership Selling
- ❖ Module 8: Sales Coaching for Managers

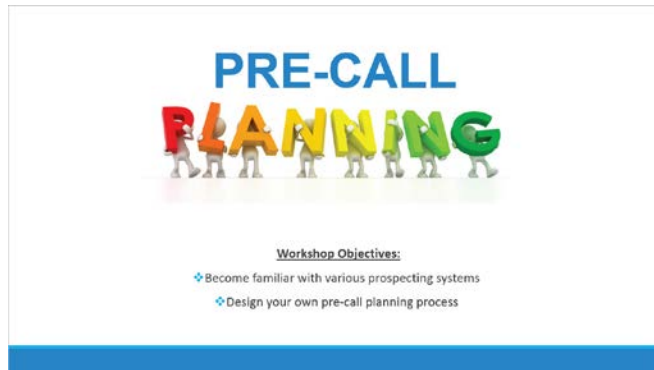


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Workshop Agenda (2 minutes)

Agenda

- ❖ Overview of various prospecting tools and resources
- ❖ Practice using tools and resources using real-life case studies
- ❖ Design a pre-call planning process / checklist that works for you
- ❖ Put it all together with an Action Plan
- ❖ Bridge to Module 2: Outbound Calling

Slide 5

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Introductions (3 minutes)

Introductions

- ✓ Name
- ✓ Work Area
- ✓ When you think of planning, what comes to mind?



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