Client Data Checklist

Research and verify prospect's full name before you visit

Have a valid and legitimate reason for every visit

It's always best if you have 3 key points you want to make with the prospect

Always listen MORE than you speak – they are the most important person

When they are speaking listen so you can respond to their comments

Introduce yourself around the office whenever you can

Leave a Maven Article with them – a different one everytime

Confirm the correct legal name of the company or organization

Identify the mailing address and the physical address

Collect business cards wherever possible (goal to build an email database)

It's always impressive if you (ask first) and then take notes

A valuable interaction is when you "interview" them with pre-selected questions

Record those interview answers in your CRM

Find some "personal" facts about your client to help build a connection

When you end the sales call, establish the day, date and time of the next visit

Also confirm what the next steps will be when you talk again

Enter email addresses into a CRM (or a spreadsheet)

Establish a regular email campaign to stay in touch

Email them a copy of the Maven Article you left with them

Evaluate the client's likelihood of being an "A" "B" or "C" client

Tag or identify them in your CRM as A, B, or C

If your client (prospect) is an "A" client – visit often, and a "C" prospect -rarely

Mail a "**Thank You**" handwritten personal card to everyone that meets with you

These are just some of the things you should do before, during and after a sales visit.