

CENTER OF INFLUENCE CALL PLAN TEMPLATE



COI:

Attendees:

Long Term Strategy:

1. Demonstrate understanding of the industry and the needs of the COI and his clients.
2. Expand on the relationship to become the COI's primary referral partner.

Call Objective:

1. Understand the current objectives of the COI
2. Identify 3 needs (short, long, and current) and use the top need set next appointment.

Strategy for the Call:

1. Demonstrate a degree of industry experience by talking about key industry issues.
2. Get them talking early on the call.

Why Your Company

Input your Value Statement

Transition Statement

We didn't come here by chance. We specifically target referral sources like yours. Today, if it's alright with you, I would like to take some time to ask you some questions that will help us better understand your company, your clientele, including your history, future objectives, and business operations.

HISTORY

1. How did you get started?
2. What have been 2-3 keys to your success?

CURRENT

1. What are 2-3 major challenges do you see?
2. 2-3 current objectives you have.

FUTURE

1. Where do you see the company in 2-3 years?
2. What are your objectives to ensure that?

BUSINESS OPS

NEXT STEPS