PUT THE FOUR STEPS TO WORK

Plan your next prospect list

Use this sheet for one prospect. Reuse the fit definition and requirements as you work through the next four.

- [ ] I can name the problem we solve.
- [ ] I know the requirements and their reasons.
- [ ] Each prospect has a fit decision and a specific next move.
- [ ] The next review is on the calendar.

01 Find the shared problem

We help [customer] solve [problem] because [why our approach fits].

Customer evidence

Still to verify

02 Set the boundaries

Firm requirements and the business reason for each

Possible exception

Who approves it?

03 Choose the next move

Known fit facts and source; the question still unanswered

Prospect / buying role

Decision / next action

04 Learn from the conversations

What to keep or change, and the evidence behind it

Review owner

Review date

Fill in digitally or print. Check each box when that part is ready.