

Honest SellingSM

Name _____ Title _____

Company _____

Address _____

Meeting Purpose _____

1. Objectives

- A. **What does [Name] want to increase and/or decrease?** (Conduct inquiry, offer insights and challenge thinking, until you get the answer to this question.)
- B. **What positive results will this produce?** (Learn vision of success.)
- C. **How will these results be measured?** (Identify all subjective and objective criteria.)
- D. **What transitional pain will occur?** (Discuss how bad things will get before getting better.)
- E. **What additional pain might achieving these results cause?** (Look to the future.)

Repeat Steps A through E, until you've identified all objectives.

2. Obstacles

For each desired increase or decrease (objective), answer the following questions:

- A. **What stands in the way of achieving this objective?**
- B. **Who stands in the way of achieving this objective?**
- C. **Who will be negatively affected when this objective is achieved?**

3. Solution Options

Determine the best way for [Name] to achieve these objectives:

- A. **Why aren't you doing this on your own?** (Find internal obstacles.)
- B. **Whom else are you considering?** (Determine competition.)
- C. **Why are you considering me?** (Learn what strengths your prospect believes you have.)

4. Your Proposed Solution

For each desired increase or decrease (objective), answer the following questions:

- A. **Process:** What is the basic process you'll use to accomplish the objective?
- B. **Joint Accountabilities:** For what are you and [Name] responsible and accountable?
- C. **Timing:** What is the fulfillment schedule?
- D. **Financial Terms:** What is your fee or cost? What are the payment terms?

5. Finalizing The Agreement

- A. **Signatory:** Whose name and title must be on the proposal?
- B. **Influencers:** Who must also agree?
- C. **Process:** What is [Name's] preferred process for making his or her decision?
(For example: How many meetings? Will presentations be necessary?)