

- WALK-IN
- PHONE
- WEB LEAD

ESTABLISHED RELATIONSHIP CONNECTION SHEET

TEAM MEMBER _____ DATE _____ TIME _____

PROSPECT NAME _____ PHONE _____ EMAIL _____

Opening- "Hello may I speak with _____ ?

Hi, _____ , this is (your first and last name) calling." PAUSE

Disarming- "If you recall, you had inquired at (name of community) for _____ ." PAUSE "Do you have a quick minute? " PAUSE

Reason- "The reason I'm calling is it's been some time since you've spoken with us and I wanted to ask you a few quick questions."

Take me back to the day when you initially contacted us. What made you decide to call that day?

How have things changed since then? _____

What do you enjoy most about your current lifestyle? _____

What other options have you explored? _____

Based on what you've shared with me, what is most important to you? _____

What is your deciding factor? _____

Who else is supporting your decision? _____

So based on what you've told me it sounds like... (recap conversation) _____

The next step is ... _____

Offer option of two _____

