

Consultant Name _____
Telephone No. _____

3-way, Interview, Presentation, Follow Up
Date _____
Time _____

BIO OF PROSPECT

INFORMATION

Name: _____
Address: _____
Tel. #: _____
Family: _____
Occupation: _____
Recreation: _____

Please explain how you know or met this person:

What is present status of prospect (What do they know about Ambit? Are they a customer? Been to a meeting, Listened in on a conference call, etc)?

Circle Top 3 Hot Buttons – (Why would they be looking at the business):

Money:

Supplemental	Financial Independence	Residual Income	Education Fund	Retirement
Time Freedom	More Holidays	Career Change	Sick & Tired	Burnt Out
Secure Freedom	Be Own Boss	Work From Home	Helping Others	Capitalize on Contacts

Circle Top Three Positive Characteristics:

Well-connected	Friendly / Fun	Enthusiastic
Go-getter / Ambitious	People-Person	Professional
Sharp / Dynamic	Entrepreneur	Hardworking
Sense of Humor	Great Salesperson	Open-Minded
Business owner / Mgr	Outgoing	Intelligent
Well-respected	Influential	Business-Minded

Present Status: (What do they know, what brochures have they received, Are they a customer, have they plugged into anything?) Please Explain:

Circle Approach: Direct / Evaluation / Referral

Notes:

