



SAMPLES PROVIDED

Samples can be downloaded at www.richworldwide.com/download-center.html. Samples have been provided to assist you in understanding the various elements of our programs. All names and information are fictitious in the samples.

ABC Company Program Outline – The program outline defines the program goals, demographics, scripting, objections, and information that will be sent to prospects. The program outline is completed prior to startup of your program. It will form the foundation of your program and summarizes our understanding of how best to conduct your sales program. It is prepared after we have reviewed your website or other promotional materials and received your completed New Client Questionnaire. Your program outline will be submitted to you for review and approval.

All Calls Report - You will receive this report each business day and it will detail all calls that were made on your account. This report is a great tool for reviewing trends and refining the program as needed.

The Lead Report is sometimes called the Appointment Report. This report is generated as needed for each and every lead or appointment that we generate. The top portion will detail the prospect itself (contact name, address, phone number, SIC header, number of employees, etc.).

The Notes/History Section will detail all communication with your prospect. These notes will provide you with valuable information that will help you customize your presentation to the prospect. Details may include answers to qualifying and probing questions, references to their demeanors, and any other information that might be helpful to you. The Activities Section will detail our recommendations for future actions for your staff.

The reports can be **customized to suit your needs**. Please contact us if you have further questions.

