

# Prospect Experience Cycle Worksheet

Use this worksheet to plan each step of your prospect's journey across four phases of engagement.

## 1. Outreach: How will you initiate a meaningful connection?

### Research & Preparation:

- Company Name:
- Decision makers + Decision Influencers:
- Recent company news/developments:
- Potential opportunities:

### Outreach Strategy:

- Contact method:  Email  Phone  LinkedIn  Referral  Letter  Other: \_\_\_\_\_
- Key message/reason:
- Why Us? Why Now? Why Not?
- Next step you want them to take:

## 2. Dialogue: How will you create meaningful two-way conversation?

### Questions to Ask:

1. Current situation questions:
2. Impact questions:
3. Future state questions:

### Information to Share:

- Relevant insights about the industry/supply:
- Similar client situations to share:
- Thought-provoking perspectives to share:

**Next Steps Planning:** How will you advance the conversation to the next step?

## 3. Value: How will you demonstrate clear, relevant value?

### Value Demonstration Strategy:

- Information or resources you can share:
- ROI or cost savings potential:

**Proof Points:**

- Case studies that match their profile:
- Testimonials from similar clients:

**Custom Solutions:**

- Specific features/services that matter:
- Implementation considerations:

## 4. Relationship

**How will you build lasting, trusted partnership?**

**Ongoing Engagement:**

- How you'll stay top-of-mind:
- Additional ways to help their business:
- Referral opportunities:

**Communication Preferences:**

- Their preferred communication method:
- Frequency of contact:
- Best times/methods to reach them:

## Action Tracker

**Current Stage:**  Outreach  Dialogue  Value  Relationship

**Immediate Next Steps:**

- 1.
- 2.
- 3.

**Follow-up Schedule:**

- Next contact date: \_\_\_\_\_
- Method of contact: \_\_\_\_\_
- Purpose/Reason: \_\_\_\_\_