

Initial Call Checklist

Mindset, Money, Motivation

- ☐ Inquiry
- ☐ Ask permission
- ☐ Uncover the pain, what caused them to look for a franchise? Have they looked at other franchises?
- ☐ Industries they are interested in
- ☐ Client's background and experience
- ☐ Timeframe
- ☐ Investment and funding
- ☐ Value Statement
- ☐ Ask permission
- ☐ Value Script
- ☐ Establish Referral Request
- ☐ Determine if they are qualified or not
- ☐ Establish how you are paid IF they ask
- ☐ Establish process
- ☐ Establish value
- ☐ Planned Advance