



Practice Activity:

Apply Prospecting Strategies

Objective:

Apply prospecting concepts to engage effectively, ensuring continuous and meaningful engagement, and keeping your brand top-of-mind.

Instructions:

You have a potential prospect, Josh, the owner of Green Energy Solutions. Apply the three prospecting strategies mentioned below to engage Josh effectively:



Priming Memory



Sphere of Influence



Sphere of Engagement

Develop an engagement plan for Josh, incorporating the above strategies. Include specific dates for emails, calls, social media and group events.

Best Practices to Consider

Consider the best practices provided below to create your Engagement Plan.

Step 1: Priming Memory

Create a Content Calendar for Josh.

- ✓ **Weekly Local Business News:**
Share current news and insights.
- ✓ **Bi-Weekly Personalized Follow-Ups:**
Address specific needs and provide tailored solutions.

Step 2: Sphere of Engagement

Plan Phone, Email, and Social Media Engagement.

- ✓ **Social Media Engagement:**
Share relevant posts and articles to maintain visibility.
- ✓ **Regular Check-Ins:**
Schedule calls to discuss his company's needs and offer support.

Step 3: Sphere of Influence

Leverage Client Referrals and Trade Groups.

- ✓ **Client Referrals:**
Encourage satisfied clients to refer Josh.
- ✓ **Join Trade Groups:**
Engage in discussions and build rapport where Josh is active.

Josh's Engagement Plan

Follow the instructions provided below to create your Engagement Plan.

Ensure continuous and meaningful engagement with Josh, keeping your brand top-of-mind and leveraging relationships to build trust and influence his decision-making process.

	Month 1	Month 2	Month 3
Priming Memory Tasks	Weekly Local Business News Bi-Weekly Personalized Follow-Up	Weekly Email Plan Bi-Weekly Personalized Follow-Up	Weekly Email Plan Bi-Weekly Personalized Follow-Up
Sphere of Engagement Tasks	Social media Engagement Regular Check-in Calls	Social media Engagement Regular Check-in Calls	Social media Engagement Regular Check-in Calls
Sphere of Influence Tasks	Encourage Client Referrals: Join Trade Groups:	Encourage Client Referrals: Join Trade Groups:	Encourage Client Referrals: Join Trade Groups:

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When you're ready, return to the e-learning course to continue your learning journey.