



## Business Development Pre-Plan

BASIC INFORMATION	
Organization Name: _____ Point of Contact and Title: _____ Company Contact Information Address: _____ Phone: _____ Email: _____	Referral Tier (Circle one):    Hot    Warm    Cold Date of Visit: _____
MEETING PREPARATION	
Current Resident Relationships	
Past Resident Relationships	
Background Information (Do your research!)	
MEETING STRATEGY	
Meeting Objectives	<i>(What is the stated purpose of the meeting? Is the value to the professional clearly defined and communicated? Example: Can they refer appropriate residents to you?)</i>
Information to Gain	<i>(What is needed to help you identify win-win scenarios between you and this contact?)</i>
Insights to Share/Collateral	<i>(What updates or information do you plan on sharing with/knowledge of Solstice? What tangible items are you taking with you that could be a source of value to the professional?)</i>
Next Step/ Target Outcome	Good –  Better –  Best –