



## Business Development Pre-Plan

### BASIC INFORMATION

Organization Name: _____	Referral Tier (Pick one):    A    B    C
Point of Contact and Title: _____	Date of Visit: _____
Company Contact Information	
Address: _____	
Phone: _____	
Email: _____	

### 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?)</i>
Who's going with you?	<i>(List out any A-team members that are going with you and what their role will be during the meeting.)</i>
Information to Gain	<i>(What is needed to help you identify win-win scenarios between you and this contact?)</i>
Insights to Share	<i>(What updates or information do you plan on sharing with/knowledge of Solstice?)</i>
Collateral	<i>(What tangible items are you taking with you that could be a source of value to the professional?)</i>
Next Step/ Target Outcome	<i>Good –</i> <i>Better –</i> <i>Best –</i>