

Holiday Prospecting Plan



Set Clear Goals for the Season



- Decide how many new prospects you want to reach out to before year-end.
- Write out your goals:
 - Number of lead-generating letters/emails to send.
 - Number of calls/dials to make daily and weekly.
 - Number of appointments to set.
 - Number of prospects or dollar amount to close.

Ramp Up Activity



- Remember: Prospects and clients often have more time to meet during the holidays.
- Keep your prospecting efforts up—don't slow down because others do. 2X
- Use extra time to increase outreach.

Use Lead-Generating Letters



- Draft and send personalized letters or emails to potential clients



Plan for Scheduling Client Meetings



Meet with Current Clients



- Invite clients to lunch, coffee, or a holiday visit.
- Review their accounts and prepare to ask for more business or cross-sell a new product or service. (be prepared to ask questions and identify new opportunities)
- Set a goal for how many additional client meetings you'll schedule before the end of the year.

Make It Personal



- Use the holiday season as a reason to reconnect and show appreciation.



Plan for Writing Notes



Thank You Notes and Letters



- Block time on lower activity days to write thank you notes or letters to current clients.
- Express genuine appreciation for their business.
- Set a goal for how many thank you notes/letters you'll write before year-end.

Sample Thank You Letter:

Subject: Trust

John,

Thank you for the opportunity to serve you as a client this past year. We know you have choices when it comes to our service, but wanted to make sure you knew how much we appreciate your business. If you are not opposed I would love to have the opportunity to talk about who you know that might enjoy the great service we have provided you. I will follow up with a phone call.

To Sales Acceleration,
Owen Van Syckle



Referral Scripts



When meeting or talking with clients, use a script like:



“Most salespeople spend 80% of their time selling and only 20% on servicing existing clients like yourself. As you have experienced, I spend 80% of my time working with clients and 20% selling. How would you feel about referring me? I can help you identify potential people. How does that sound?”

Bonus: Ask about next year's opportunities



- “What is changing in your business next year?”
- “Tell me more about your planning for next year.”

