

UFO/DIST NAME \_\_\_\_\_ 3-Way Call or Interview  
 Phone # \_\_\_\_\_ Date: \_\_\_\_\_  
 ATG Ext \_\_\_\_\_ Time: \_\_\_\_\_

## **BIO OF PROSPECT**

Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Family \_\_\_\_\_  
 Occupation \_\_\_\_\_  
 Recreation \_\_\_\_\_  
 Money \_\_\_\_\_

Please explain how you know or met this person:

\_\_\_\_\_  
 \_\_\_\_\_

### **Circle Positive Characteristics**

Entrepreneur	Open Minded	Great	Enthusiastic
Business Owner	Intelligent	Salesperson	Go-Getter
Well-connected	Sharp	Influential	Ambitious
Friendly	Dynamic	Manager	Honest
Fun	Caring	Well-respected	Sincere

### **Circle Hot Button (Why would they be looking at the business)**

MONEY	Supplemental	Financial independence	Ongoing income	College fund	Retirement
TIME FREEDOM	More vacations	Time with family	Travel		
CAREER CHANGE	Sick & tired	Burned out	No job security	Be your own Boss	Work at home
OTHER	Help others	Charities	Religion	Challenge	

Present status: What do they know, what have they received, are they on product, have they been to any trainings? Please explain \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

Circle Approach: DIRECT / EVALUATION / REFERRAL / INTERVIEW 10 – CHOOSE NOTES \_\_\_\_\_

\_\_\_\_\_