

## Past, Present and Future in Sales



Prospect Name: \_\_\_\_\_

### PAST

Results

Mitigation Issues

Behaviors

Training

What impact has the past had on them?

### PRESENT

What is current situation? Rates. Environment. Culture. Trends.

### FUTURE

Anticipation on what will/could happen

Specific Advice / Plan for how they should act: Results, Behaviors, Mitigation, Training