

Improving Prospect Management with a 1-31 Rotating Card File Prospect Box

These are the tools you need:

- 100+ 3x5 or 4x6 index cards, color coded if you like
- 2 sets of 1-31 tabbed index cards (for 60 days of tracking follow-ups)
- 1 set of January – December tabbed index cards
- 1 6” or deeper prospect box that latches closed
- 4 or more blank tabbed index cards for customizing your own categories

Here’s some suggestions for setting up the cards with your prospects information on them. There are no hard rules, but the more consistent you are, the more effective you will find yourself being. Good Luck! I hope you find this idea as valuable, time saving and profit producing as I have!

Format Examples for Your Prospect Cards

Prospects Name – Title Assistants Name – Title	Phone # Phone # Fax # E-Mails	<i>Make a Box for Date of Next Call in Pencil</i>
<p><i>Write out the Company info here so you can staple a business card over it later.</i></p> <p>Company Name Address City, State Zip</p>		
Receptionists Name	<i>Use brackets if you should NOT use Referred by name ></i> (“Referred By” Name)	

You can write pertinent data on the back lined side such as directions, key info or good questions you should ask next time you speak. You can also note specific actions or promises made. Start every new conversation with a date, and separate thoughts with a slash (/).

Sample Notes made for Future Reference

10/4 MI C/B – This is code for when I leave the message “I’ll call back, or you can call me at your convenience” / 10/5 Spoke & will send info / He said they may have an XYZ project in December to follow up with / 10/6 Mailed info pak, c/b 10/10 / 10/10 We spoke & I’ll quote on XYZ project / Call late Nov to qualify needs / 10/12 You can keep stapling cards to this if you develop a lot of history / 10/14 Anything written in quotes clues me to say that very thing the next time we speak, even if I don’t remember exactly what it meant. / An example is “How did you and your family enjoy your Holiday Vacation in Disney World?”