Account:

|  |
| --- |
| **Goals** |
| **Stretch Goal:** |
| **Goal:** |
| **Minimum Acceptable Outcome:** |
| **First three topics of discussion** |
| Are you ready for … ? |
|  |
|  |
| **Current personality test questions** |
| Are you ready for … ? |
| **Disarming Authority Statement** |
| We’ve seen many scenarios with … |
|  |
| **Questions** |
|  |
|  |
|  |
|  |
|  |
|  |
| **Next Appointment / Thing to Do** |
|  |

|  |
| --- |
| **SECURITY SYSTEM:** What are they currently using? |
| Access Control:  Video Management:  Cameras:  Other: |
| **CURRENT PROVIDERS:** Security and other related service providers |
| Security:  Phone:  IT / MSP:  HVAC:  Fire:  Other: |
| **TOP 2 – 3 FACTORS WANTED IN SECURITY PROVIDER:** What’s important to the organization and to your contact in regard to a security provider? |
|  |
| **POSITION IN ORGANIZATIONAL CHART:** Understand where your contact is positioned. |
|  |
| **COMMUNICATION METHODS:** When and how to contact them? Not contact them? Do they use social media? What types and how? |
|  |
| **PERSONAL:**  What about your contact’s family life and hobbies? |
|  |