

## Niche Interview – Worksheet

Niche prospect interview worksheet

Prospect Name \_\_\_\_\_ Date \_\_\_\_\_

Company \_\_\_\_\_

### Before the meeting:

1) Why are you having this interview?\

- Researching a niche?
- Offering a resource (products &/or services)?

2) Why is this person a likely prospect?

- Area of interest
- Kind of need

3) What do you know about this person that will help you get an appointment and build rapport in the meeting?

- Personal
- Business

### Phone call to get the appointment.

Hi I'm \_\_\_\_\_, and I'd like to meet with you

- to get your input for research about \_\_\_\_\_.
- about being an \_\_\_\_\_ resource for you.

### In the meeting

#### 1) Intro

Hi I'm \_\_\_\_\_, and as I said in my phone call I'd like to talk with you (for reason given in phone call).

#### 2) Build Rapport

Ask questions that are easy to answer. If you have done research prior to your visit and you know that they or their company has recently won an award or been honored, you might want to ask about this. Once they do begin talking, give them your complete attention. If you are really

listening, you will be given clues that will help you ask follow up questions that will keep them talking.

How did you get to this point? Tell me your story?

### 3) Listen for the need, desire, and emotion.

a) What's the biggest challenge or frustration you're having with \_\_\_\_\_ right now?

b) What's your ideal outcome scenario, in detail?

c) What have you tried so far but didn't work?

d) What have you tried so far that did work?

e) What's your biggest fear when it comes to \_\_ (challenge) \_\_?

f) What worries you – what are you afraid will happen if you don't do something immediately?

g) What would you be willing to do to solve/get –(challenge)\_\_?

h) If you could have one question answered about \_\_ (challenge), what would it be?

i) What motivates you to take action, and what demotivates you?  
(This is really important to provide the motivation for step 6.)

#### 4) Clarify & summarize the situation

If I understand you correctly, your biggest challenge & frustration is \_\_\_\_\_ and \_\_\_\_\_ is the outcome you'd like. Is that right?

#### 5) If you are only gathering information and the prospect shows no emotional connection with the situation you just described and no inclination to go further, end the interview right here

Thank the prospect for their time, and ask if you could follow up with any questions that might occur to you.

#### 6) If the prospect shows interest, offer immediate help to show that you understand the prospect's need and can help them get the desired results.

If I show you something that has been proven to get your desired result, and if you agree that it is something you should and can do, can I count on you to do it?

Based on what you told me about (the challenge or frustration) and about (the outcome) you'd like, I'd like to recommend one technique and a couple of action steps.

Explain the technique.

Explain the action steps.

If you will do this, I believe you will get the outcome that you want, so that (tie in the motivator/demotivator from step 3e.

#### 7) Close

Will you agree to do this action at (some particular) time? Will you give me your word that you will do it?

Don't let them say "Well maybe." Close them for their own good. Step up and be an advocate for them.

"No. Will you agree to do this action at (some particular) time?"

If they agree, say "Congratulations. I'm really proud of you. That was huge. Now what I want you to do is honor your agreement and do what you agreed to do. How would you like me to follow up?"

The idea here is not to sell your product or service, but to give the prospect a specific, simple action step to implement and lead them one step in the direction in which you can help them go the distance. Get a follow up date to reconnect, get their response, and consider your products/services.