DAY 07 Tuesday, 17 Nov 2026

Prospecting - How to Find Potential Customers?



Key points

1. Introduction to Prospecting
2. Identify Target Market
3. Multiple Lead Sources
4. Build Professional Relationships
5. Maintain Prospect List
6. Customer Needs Identification
7. Permission-Based Contact
8. Follow-up Planning

DAY 07: PROSPECTING - HOW TO FIND POTENTIAL CUSTOMERS?

Introduction

Prospecting is the process of identifying people who may have a need for financial protection and may be interested in discussing suitable insurance options. It is an essential activity for building a sustainable sales network.

1. Identify Your Target Market: Identify individuals who may have an interest in family financial protection and financial planning.
2. Use Multiple Sources: Build connections through family circles, friends, professional contacts, business communities and referrals.
3. Build Relationships: Establish genuine relationships through respectful and meaningful conversations.
4. Maintain a Prospect List: Record names, lead sources, contact permission, last contact and next follow-up.
5. Focus on Needs: Understand each person's needs and financial capacity before presenting any solution.

Practical Example

A teacher, doctor and business owner in your professional network may be potential prospects. Ask permission to contact them, introduce yourself and understand whether they would like to discuss financial protection.

Today's Assignment

1. Create a list of at least five potential customers.
2. Record each person's name and lead source.
3. Contact at least one person with their permission.
4. Record the conversation outcome and next follow-up.

Key Learning

Your next customer may be just one meaningful conversation away.

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