

TRI Professional's System

Sales Call Checklist

This checklist is designed to be used in conjunction with the **Sales Call Navigation** tool in the **Sales** toolkit located at <https://www.taxresolutioninstitute.org/pro-portal/sales/>

Prospect Name _____

Prospect Email _____

Prospect Phone _____

Check each box once step is complete

Prequalify

Gain Trust

Discover Motivation

Set Price

Close

Notes
