Five days of practical prospecting

How to use this plan

Use one page each day at your own pace. The activity counts are suggestions to build confidence, not required work hours or earnings promises. Choose a niche you understand and focus on a useful conversation rather than pitching every service.

Your tools for week one

Account Manager Quick Guide
Conversation and Wins Tracker
Live demos and case studies
No GoHighLevel login is needed this week.

Simple conversation flow

Introduce yourself accurately. Ask permission. Mention one factual observation. Ask how the task works today. Listen for a confirmed need. Offer one relevant example. Agree the next step and record it.

Keep records useful

Keep only necessary business contact details. Do not enter payment card details, passwords, sensitive personal information, or private client data in the tracker. The tracker saves on this browser only. Export a backup daily; use your manager's approved channel to share it.

Your definition of a win

A first introduction, discovery answer, permission to follow up, demo, warm introduction, or booked session can all be wins. Record exactly what happened. Never present example results as guaranteed or fabricated reviews as real customer experiences.

Day 1 Start with familiar businesses

Daily objective

Build confidence explaining one useful outcome. Suggested activity: research 10 businesses you know, make 5 individual introductions, and log every response. A completed practice conversation is a win.

Prospecting exercise

1. Read the Quick Guide pricing and service pages. Pick one service you can explain in 30 seconds.
2. List 10 owners or local businesses you already know. Check each public website, contact page, and Google Business Profile. Record one factual observation, such as no online booking button.
3. Practice twice with a partner. Then ask five appropriate contacts individually for permission to share a relevant idea. Use a public business phone or an existing permitted channel.
4. Ask one discovery question. Log the reply and agree a next step; do not send unsolicited bulk messages.

Suggested opening

Hi [name], I am [your name], an Account Manager with The AI Dealer. We help businesses handle inquiries, improve their web presence, and follow up with customers. I noticed [specific factual observation]. How are you handling [related task] today? If it is useful, could I show you one short example?

Next-step language

If they are not the owner: Who is the best person to ask about [task]? If they are busy: What day would be better for a brief follow-up? If they decline: Understood, thanks for your time. Record the opt-out and stop outreach.

What to track and celebrate

Business, contact or role, channel, observation, response, next step and date. Mark a win for your first completed introduction, useful discovery answer, or permission to follow up.

Day 2 Find a local customer experience gap

Daily objective

Learn to match a real business problem to one service. Suggested activity: review 10 local businesses in one category, make 5 relevant introductions, and aim for 2 useful discovery conversations.

Prospecting exercise

1. Choose a category you understand: roofers, salons, auto repair shops, or local professional services.
2. Search Google Maps manually for businesses in your area. Open their own public websites. Look for a confusing mobile contact path, limited booking options, or inconsistent review requests. Do not assume missed calls or lost revenue.
3. Record the business name, public contact method, and one neutral observation. Choose five with a clear reason to speak.
4. Call individually during normal business hours or introduce yourself in person where welcome. Ask about their current process before suggesting a service.

Suggested opening

Hi, this is [name] with The AI Dealer. I was looking at [business] and noticed [specific observation]. Quick question: when a customer needs [booking / an answer / a review link], what happens today? Is that working well, or is there a step you would like to simplify?

Next-step language

If a problem is confirmed: That sounds like a possible fit for [service]. Would a two-minute example help? If it is working well: Glad to hear it. Is there a different customer follow-up task taking more time than you would like?

What to track and celebrate

Add the confirmed problem in the owner's words, likely service, and permission to send an example. A clear no-fit decision or referral to the right person also counts as a useful outcome.

Day 3 Show one relevant demonstration

Daily objective

Get comfortable demonstrating value. Suggested activity: follow up with yesterday's interested contacts, offer 3 short demonstrations, and seek 1 agreed next step. These are practice suggestions, not quotas.

Prospecting exercise

1. Choose the demonstration that matches each confirmed problem: a website example, Morgan AI phone demo, or the review and video collector examples.
2. Test the example yourself. Explain what is a demonstration and what still needs scoping.
3. Contact only people who agreed to hear more. Ask for a convenient time. Show one flow: customer question to answer, inquiry to contact request, or review invitation to submission.
4. Ask what would need to change for their business. Offer a strategy session for technical or custom scope questions.

Suggested opening

You mentioned [problem]. Here is one example of how [service] could help with that step. This is a demonstration, and we would tailor the agreed setup to your business. What part would be most useful, and what would need to work differently for you?

Next-step language

If interested: Would you like a short strategy session to confirm fit, scope, and the right package? Use the booking page. If unsure: What question would you need answered before considering a next step? Do not promise a launch date, integration, or result without confirmation.

What to track and celebrate

Log the demo shown, the prospect's actual reaction, open questions, and agreed next step. Wins include a demo completed, a useful objection understood, or a strategy session booked.

Day 4 Follow up and ask for introductions

Daily objective

Practice useful follow-up without pressure. Suggested activity: review every open conversation, send 5 permission-based follow-ups, and ask 2 receptive contacts for an introduction.

Prospecting exercise

1. Filter the tracker for next actions due today. Review what each prospect actually said.
2. Prepare a short follow-up with one relevant answer or example. Use a case study from the same channel if helpful; describe it as a supplied historical example, not a guaranteed outcome.
3. Send an individual message through an appropriate agreed channel. Ask one easy question.
4. For receptive contacts, ask for a personal introduction to another owner. Ask them to introduce you rather than handing over someone's private details. Respect no-contact requests.

Suggested opening

Hi [name], following up on your question about [topic]. The relevant next step is [specific answer or example]. Would you prefer a short call on [option A] or [option B], or should I close the loop for now?

Next-step language

Referral wording: Do you know another owner who is dealing with [specific problem]? If someone comes to mind and they are open to it, would you be comfortable introducing us? If they are not ready: No problem. Should I check back on [date], or leave it with you?

What to track and celebrate

Record follow-up date, response, next action, and any introduction permission. Wins include a reply, a scheduled conversation, a clear decision, or a warm introduction.

Day 5 Turn interest into a clean next step

Daily objective

Build a manageable pipeline and finish with momentum. Suggested activity: follow up with the 5 most relevant open prospects, complete every next-action date, and review 3 lessons from the week.

Prospecting exercise

1. Review each conversation. Separate no-fit or opted-out contacts from interested prospects. Give every interested prospect one clear next action and date.
2. Ask whether the prospect wants a strategy session, a written scope, or time to consider. Bring technical questions and exceptions to Kenneth.
3. For a ready buyer, confirm service, setup, monthly package, and client scope before using the approved order process. For ads, the selected monthly tier includes ad spend; confirm allocation and deliverables. Do not collect card details yourself.
4. Export your tracker and share only the needed business information through the management-approved channel. Choose next week's focus; GoHighLevel training starts no earlier than week two.

Suggested opening

Based on what you shared, [service] looks relevant because [confirmed need]. The next step is to confirm [scope question] together. Would you like to book a strategy session, review a written scope, or revisit this on a specific date?

Next-step language

If they want to proceed: I will confirm the scope and package with our team, then walk you through the approved agreement and payment process. If they are not ready: What would make this worth revisiting, and when should we reconnect?

What to track and celebrate

Capture final stage, next action and date, open scope questions, and the win. Count conversations, demos completed, sessions booked, introductions, and paid orders separately; a booking is not a paid sale.