

Think best practices and practical tips, starting with a short list of “don’ts.” These are everyday examples that show how small tweaks can lead to much better outcomes. No finger-pointing—just helpful reminders to keep us sharp and successful.

🚫 **Don’t #1:**

Don’t send an email with attached activities list stating: *“Attached is our list of activities. Please take a look at let me know if there’s anything you might be interested in and possibly taking a tour.”*

Instead, customize an email with an invitation to a specific event attached with lunch and explain the benefit to the prospect: *“Enjoy a delicious meal prepared by our chef while learning a little more about our lifestyle. A great way for your mom to take baby steps into learning more.”*

🚫 **Don’t #2:**

Don’t schedule a next activity: “follow up to see if interested”. Example: *“11/1 Tour for MC, husband still active, golfing every day, wife wants a plan. Next scheduled activity 12/1 call to see if still interested.”*

Understand the journey and meet the prospect where they are. What is the next step? In this case, there should be a nurture cadence established, not a follow up call to see if they’re interested.

🚫 **Don’t #3:**

Don’t apologize for “bothering” them or state, *“I hope I’m not bothering you.”*

This shows a lack of confidence and creates distrust. Instead approach the call with confidence, a statement of fact and an open-ended question. If you are hesitant to pick up the phone, re-assess. Practice with a coworker until you feel comfortable.

🚫 **Don’t #4:**

Don’t use the words, *“I was following up...”*

That sounds like you’re checking them off the list. Instead, replace with, *“I was thinking about you and wondering how things are going with XX”*.

These examples aren’t about criticism—they’re about awareness and improvement. More tips (and the “do’s”) to follow.

Thank you for your continued commitment to thoughtful, effective sales practices.