

UFO/DIST NAME \_\_\_\_\_ 3-Way Call or Interview  
 Phone # \_\_\_\_\_ Date: \_\_\_\_\_  
 Pat Live Ext \_\_\_\_\_ Time: \_\_\_\_\_

- Can be filled out by UFO or Potential Business Owner
- Interview 10 to choose 2

**BIO of a Business Owner**

Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Family \_\_\_\_\_  
 Occupation \_\_\_\_\_  
 Recreation \_\_\_\_\_

Please explain how you know or met this person:

\_\_\_\_\_  
 \_\_\_\_\_

<b><u>Circle Positive Characteristics you possess</u></b>			
Entrepreneur	On-going Learner	Sincere	Honest
Business Owner	Dependable	Committed	Health
Well-connected	Self-Motivated	Disciplined	conscious
Friendly/Fun	Team Player	Intentional	Organized
Coachable	Enthusiastic	Ambitious	Relational

**Circle Hot Button (Why would they be looking at the business) CHANGE!**

MONEY	Supplemental	Financial independence	Ongoing income	College fund	Retirement
TIME FREEDOM	More vacations	Time with family	Travel		
CAREER CHANGE	Sick & tired	Burned out	No job security	Be your own Boss	Work at home
OTHER	Help others	Charities	Religion	Challenge	<u>Health</u>

**Circle Interest Level on a Scale of 1 2 3 4 5 6 7 8 9 10 \*Next Step is.....**

**Present Status:** What do they know, what have they received, are they on product, have they been to any trainings? Please explain \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_

**Circle Approach:** DIRECT / EVALUATION / REFERRAL / INTERVIEW 10 – CHOOSE 2