



An Interactive Guide to
PROSPECT DEVELOPMENT
SITE VISITS



SITE VISITS are strategic knowledge-sharing opportunities where two prospect development teams from different organizations discuss their processes, successes and challenges. They explore new ideas, drawing on each other's experience of what has worked for them.



CORE COMPONENTS



TWO PROFESSIONALS

2+ professionals from different organizations, often counterparts



DURATION

2-3 hours, enough to dive in but not experience fatigue



RESOURCES AND TEMPLATES

Use your agenda to identify which resources and templates may be helpful to review



ROLES AND RESPONSIBILITIES

Outline participants' daily job functions in a few bullets

RESPECT CONFIDENTIALITY

Share information ethically and don't offer to log into your CRM



PHYSICAL AND VIRTUAL

In-person with local neighbors or virtual visit with colleagues around the world



WHO TO ASK



NEIGHBORS

Who is near your shop?
Start there!



ASPIRATIONAL PEERS

Which shops are industry experts?
They can help you see where the industry is going and guide long-term goals.



ADVANTAGES

FRESH PERSPECTIVE

Colleagues from other shops may better understand the root cause of your problem or ask a pivotal question you have not yet considered

LEARN NEW APPROACHES

Learn how to implement a new process, build a program from scratch, secure buy-in, manage changes in leadership, etc.

BUILD YOUR NETWORK

Connecting with colleagues near and far will grow your professional network.

RING YOUR BELL

Notify leadership of the time you are investing in best practices. Share news of your site visit in advance and follow-up with three things you plan to implement after.

THERAPY

Sometimes there is no magic answer to an industry-wide challenge and you'll learn that, at the very least, you're not the only shop grappling with this area.



To read more great
content, visit