

# POWER PROSPECTING SALES KIT

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**KLA**  
group

knowledge – learning – achievement

**POWERPROSPECTING  
SALES KIT**

Included  
12 Articles & 4 E-tools



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# Keep Your Pipeline Full!

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**It's not uncommon to lose focus on your pipeline—or funnel—and consistently filling it with new opportunities. Sellers often spend too much time on a few opportunities that are on the verge of closing at the bottom of the funnel, and don't seek out new leads to fill the funnel. This creates a roller coaster ride in terms of performance and results in the eyes of a sales manager, and commissions in the pockets of a rep. Without enough opportunities, a rep runs the risk of missing their quota and their commissions.**

The key rule for determining if you have enough opportunity to achieve your quota is to measure the size of your pipeline. Successful sales reps maintain a minimum of 3 times their quota in their pipeline at all times. For example, a \$100,000 per month sales quota should mean you maintain a pipeline value of \$300,000 per month.

Combined with a disciplined sales process and consistent prospecting, a pipeline 3 times your quota will ensure a continuous flow of new leads and new opportunities closing.

So how do successful sellers do it? Follows are responses based on a recent question I posed to top sales reps and managers regarding how they maintain a healthy pipeline.

## Disciplined Sales Process

Focus on the follow-up process. Most sales reps make the initial contact and close the easy deals. What distinguishes the top reps from the rest are those who follow-up when the appointment isn't immediate.

I think an open mind in the sales process is key—really listening to the customer and their struggles and customizing a solution for them based on their needs.

Don't lose sight of the smaller sales. The problem with reps today is they lose sight of their customers that give them smaller sales throughout the year. They get lost in the shuffle of larger sales (since we love those big elephants). It's the small sale that gets us through those rough periods. While this is elementary, it is difficult to keep track when you have over 300 companies you deal with year round.

Be memorable. Make a hard commitment in each discussion for the next deliverable and meet it. Personally, I set most immediate action items to be done within 24 hours and deliver on it every time. Both the need and impression left are still active in the prospect's mind. Delivering on the next step quickly makes a difference and sets an impression.

## Consistent Prospecting

I think that discipline at the beginning of the sales cycle is key—cold calls, prospecting, networking, and reading. All of that requires discipline, motivation and enthusiasm.

Ask for referrals. Set a goal for yourself to secure a specific number of referrals each month. Dig deeper and penetrate your customer base.

Look for alternative contacts who can serve as inside coaches for you and connect with them quarterly. For instance, as a woman owned business, KLA is a certified diverse supplier. Supplier diversity staff are focused on increasing the amount of business their companies do with diverse suppliers. They are inside excellent coaches for new contacts and budgets.

Watch and read the news so you can use new ideas as a way to get attention. Get creative information to approach prospects and customers with a new idea.

Set weekly objectives for the number of new referrals, prospects, meetings, and proposals. New lead generation matters. Existing customers are critical but don't lose focus on a weekly objective of meeting new qualified leads. They represent the future.

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*Successful sales reps maintain a minimum of 3 times their quota in their pipeline at all times.*

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# How to Gain Access to that Executive You Simply Must See

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**To get in the door in new accounts at the executive level, you must first establish your value with the executive. There in lies the challenge. If you haven't spoken to the executive, how can you possibly establish value? Follow these three critical steps and you will demonstrate value in meeting with you and get your appointment.**

## 1. Do Your Homework

Yes, we've all heard it before. Do research before placing the first call to get in the door. But it's what you are looking for that will give you the data you need to establish your value. Look for:

- **Possible business needs**—what might be going on in their organization that could lead them to need your offering?
- **Top strategic initiatives**—what initiatives is the company investing in? What would your target executive's responsibility be in achieving those initiatives and how can you help?

Find this information in all the places you have looked before: company web site, business information sites, on-line and printed periodicals, Google search on the executive's name, etc. Read for possible business needs or strategic initiatives you can discuss in your first call, then craft a message that demonstrates the value you will bring including:

- The possible business need or strategic initiative you have identified
- How you have helped other companies with similar needs or initiatives
- Briefly, how you think you might be able to assist
- Meeting request

## 2. Respect the Gatekeeper

Often you are lucky enough to reach a "gatekeeper" assistant taking the executive's calls. This "gatekeeper" is your ally in your efforts to schedule an appointment. Use your value proposition with him. This is the second step in establishing your credibility with the executive.

If the assistant believes you can provide value to the executive he will let you schedule time to speak with the executive. After using your value proposition, ask if it would be possible to schedule 20 minutes on the executive's calendar, acknowledging that you recognize the assistant will need to verify the meeting with the executive. At the same time, ask to leave a personal voicemail for the executive stating your value proposition and why you're on their schedule, allowing the executive to hear the value you can bring.

By sharing knowledge with gatekeepers, and affording them the respect they deserve, they can speed your efforts in meeting with executives.

## 3. Use Outlook as a Tool

Many executives do not have an assistant and you will reach voicemail when you call. Cold calling today requires an average of 9 calls before the contact will return your call. To speed the process, and demonstrate your professionalism, credibility, and value use Microsoft Outlook to schedule a 20- 30 minute meeting with the executive. Many companies use Outlook, or understand an Outlook calendar request email.

In your initial voicemail, alert the executive that you will be sending two calendar invitation options "in the event that is an easier way to respond." If you have established your value and hit on possible business needs or a strategic initiative of importance, the executive will accept your invitation, or suggest an alternative time.

How do you get email addresses without a referral?

- Ask the main receptionist
- Check the company's website to see if it is listed
- Check the company's website for clues to email formatting conventions and guess

By taking these three critical steps you can improve your odds of establishing the value required to gain access to an executive.



# Hidden Secrets to Crack the Voicemail Gatekeeper

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**Voicemail is perhaps the hardest gatekeeper to get past in the SMB market space. Executives play many roles and have little time for sellers. They use voicemail as their screening tool and you need not only a great message, but perseverance and creativity to crack through. Try these secrets to reach your top SMB prospects.**

## **1. Leave a voicemail every other day.**

It's basic but effective and many of your competitors aren't calling anymore. Too many sellers feel voicemail messages make it easy for an executive to ignore them, so they send emails only. But if you don't leave a voicemail, how does the executive even know you are trying to reach him? Email doesn't replace voicemail where the executive can hear your interest and passion. Not sure what to say to catch the executive's interest? See *Getting Past the Executive Gatekeeper* at [www.klagroup.com/resources](http://www.klagroup.com/resources).

## **2. Suggest two dates and times you might have a 15 minute conversation.**

Tell the executive you will hold the times on your calendar—and do it.

## **3. Use the 3 Cs in an email.**

Recap your voicemail in an email. Make it compelling, consultative, and concise. Demonstrate your attention to detail by including the times you suggested to talk.

## **4. Call anyway.**

Book the times you suggested on your calendar and unless you hear from the executive, consider it an appointment. Follow-up at the exact times you mentioned to demonstrate reliability. Let the executive hear your interest in speaking with him, your professionalism, and your message. Suggest another time to talk, and continue following up.

## **5. Use Microsoft Outlook's calendar and send an invitation for the two times you suggested.**

This is one of my favorite ways to connect to executives. Many companies today use Outlook to maintain their calendars. If you use it as well, turn it into an opportunity to schedule an appointment. I've had executives who accepted a calendar invitation without ever speaking with me because my message was compelling and timely. Some sellers who hear this are worried about the executives who don't use Outlook. When you send an Outlook calendar invitation to someone who doesn't use it, the invitation simply comes through as an email with the subject, date and meeting time request. If it concerns you, mention in your email that you also will be sending two Outlook invitations in case that is an easier way to respond.

## **6. Find the executive on LinkedIn and send an invitation to connect.**

If you aren't using LinkedIn, get connected and start networking. This is a hidden gem more sellers are employing for networking and relationship building. And isn't that what you're trying to do when you place a call? When an executive receives a request to link to you, he'll know you are serious.

## **7. Call Sales and ask for an introduction.**

Sales reps understand your position. With a compelling message, they will answer your questions, suggest needs you hadn't thought of, and may stop by the executive's office and tell her about you.

## **8. Send follow-up emails every 4 business days.**

Email is an easier response mechanism for executives and if your message is strong, including business results that are a priority, he will accept a meeting eventually. Don't forget to continue your voicemails.



## Hidden Secrets to Crack the Voicemail Gatekeeper (continued)

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### **9. If you reach an assistant, use your compelling opening and ask for 15 minutes on the executive's calendar.**

Remember, an executive's assistant knows the executive's business priorities and can quickly admit, refer or drop you.

### **10. Call 9 times or more—enough that the executive knows that you feel you have a compelling message and are passionate about speaking with him.**

One seller I know doesn't stop at 9. He calls until he reaches the executive personally to get a response.

For any seller working in the SMB market, being able to successfully break through the voicemail gatekeeper and get the executive's attention is mandatory. It will take some patience and persistence, but the time you invest will help you gain executive access putting you light years ahead of making a blind cold call.

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*What you're doing is creating a picture of your ideal referral for your client.*

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**Persistence and a strong message will prevail.**

**Have you downloaded the FREE 33 Tips to Get Past the Gatekeeper for more ideas yet?**



# Increase Prospecting Results by Integrating Your Touches

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**Connecting with prospects for the first meeting requires persistence, consistency—and simply wearing them down. You can speed your access time by integrating your communication strategy with multiple connection methods without frustrating prospects.**

We've spent many hours working with clients on ways they can refine their prospect touch points, and improve their overall prospecting results. Touch points include phone calls, emails, direct mail, and any other forms of communication.

Most sales people I've worked with have a solid cold calling strategy to gain access to their prospects. They cold call once every 2-3 days, and send follow-up emails every week or so. This approach gives the sales person a chance to project their professionalism and their interest in working with the prospect, by voice over the phone, while also providing the prospect with the opportunity to respond easily via email. This thorough approach helps get a more immediate response, letting the sales rep know if they have a real opportunity or if they should move on.

While this successful communication strategy is very effective, there are several ways to enhance it and speed access to new prospects.

**First**, rather than periodically following a call with an email, integrate email into your cold call strategy. Send an email following every 2 calls, or in place of every other call. The prospect is still hearing from you, knows you are interested in connecting, and has an easy way of responding. **A reminder tip: Email no more than every 3 days.**

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*The more you integrate your touches, the easier it will be for your prospect to respond.*

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**Second**, consider integrating events, articles, or other marketing news that may be of interest to a prospect into your strategy. As you spot information that may be useful to a prospect, pass it along with a quick note. This will grab the prospect's attention in a more personalized way, further demonstrating your interest in meeting, and helping you to stand-out from your competitors.

Some items you might want to pass along to a prospect include:

- A newspaper or trade publication article with information impacting their industry. This shows that you are paying attention to their business, and have solutions for their needs.
- If you are a member of a city chamber, industry organization, or other relevant organization, consider events a prospect might be interested in attending and invite them.
- Newsletters or news releases from your own company—sharing information that would be important to a prospect—should be sent with a personal note keeping the prospect current on the options available to them.

**Third**, let the message you use for voicemail and email evolve. Begin with your initial value proposition, and integrate in new knowledge you have gained from gatekeepers, voicemail and email messages, events you are aware of, and information you have sent or read. Your prospect will become immune to the same tired message no matter how many times you reach out, so let it evolve just as you will during the sales process.

The more frequently—within reason—your contact hears from you, the more he will recognize you are not going away and are serious about meeting. The more you integrate your touches, the easier it will be for your prospect to respond.

To gain speedy access to new prospects, treat them more personally while staying in front of them. Finding ways to demonstrate you understand their potential needs, and communicate in a more personalized manner, will grab attention and yield the prospecting results you desire.



# Email is the New Phone

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**If you're like I was, you believe email should be answered after hours when you're not on the phone or in customer meetings. That's how I handle client proposals. They can't be written during valuable customer "face" time, but should be saved for that time of day when customers aren't available.**

But, expectations and how email is used have changed. Many customers now expect you to hold whole conversations via email, sometimes with emails flying within minutes of each other, just as if they were instant messages or a phone call. With these changes email is now as important as face-to-face meetings and phone calls.

Here are some tips to consider when making email a primary customer interaction tool:

- **View email as the new prospecting tool.** After you leave a voicemail, follow-up with an email, giving prospects 2 easy ways to respond. Remember, your goal is to connect with the person. Even if they respond "no", you've connected and can respond to try to generate an interest.
- **Keep the sales process moving forward.** Use emails to ask requirements gathering questions, get referrals, make recommendations, and provide updates.
- **Respond to all emails with action items promptly.** You return phone calls within 1–24 hours. The expectation now is that you'll return emails within 30 minutes–12 hours. If you can't respond completely, send an email setting expectations about when you will send a full response.
- **Think—and proof—before you send.** Sometimes it's best to draft a response, then wait 30 minutes before sending. You may choose to soften, shorten, or otherwise change your response.

- **You may need a hand-held device such as a Blackberry to keep up.** Consider what tools you need to stay on top of your emails, responding to your customers more real-time, and make the investment.
- **Schedule daily time on your calendar to respond to emails.** Consider this equal to customer meeting time. If you're holding complete customer conversations via email, you really are holding a meeting. What's the difference? Give it equal time for well thought out responses and next step requests.

There are many benefits to using email: ease of connection and a better way to communicate are only a few. I recently had a prospect that was interested in having us do some training development work for her firm. She emailed me and explained exactly what she needed and requested a quote. When I requested a phone meeting to learn more like every good sales rep, she declined. She was the decision maker and I had to have the answers. So, I asked her all my questions through email and prepared a proposal based on her answers. With my proposal in hand, and without a single verbal conversation, she not only accepted it, but increased it by 20% to cover any changes in scope!

While this situation's unusual, it's becoming more and more common for customers and prospects to prefer to answer questions and move opportunities forward through email while limiting their number of meetings. Be prepared and you'll soon find yourself reducing your sell cycle and closing opportunities through email, too! Now isn't that cool?

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*...email is now as important as face-to-face meetings and phone calls.*

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# Create Email Subject Lines That Draw Prospects In

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**Email is now the preferred prospecting tool, far surpassing the phone to the relief of many sellers who hate cold calling. Yet it hasn't necessarily made prospecting any easier. Response rates are low and many sellers are discouraged by how difficult it is to engage contacts.**

**Often the culprit is the subject line.** It's one of the most important keys to getting people to open your emails.

Many sellers love to use fun subject lines like "Enticing Ideas: Kendra Lee, Did You Catch the Wave?" They think that a bit of humor will lighten the recipient's day, prompting them to open it.

**Wrong.**

**Remember who you're writing to and what you're trying to accomplish.** Your email is no different than a cold call. You're interrupting the day of an already overworked person.

Picture Steve. He has six meetings and eleven action items to conquer today. In fly forty, fifty, possibly even one hundred emails throughout the day. While humor is fun, it's a waste of valuable time Steve doesn't have. Instead of laughing at cute subject lines and enjoying his mail, he's looking for reasons to hit "delete" and avoid another thing landing on his plate. If he doesn't recognize your name immediately, your lighthearted subject line instantly hits the delete barrier.

Regardless of how busy he is, you want your subject line to draw Steve in with a **personal and compelling message**.

If you're attempting to **secure an appointment** or invite a prospect to a web event, try:

- Shall we meet Tuesday?
- Can you talk Wednesday at 2pm?
- Can you attend Friday at 12?

What makes this work when the contact doesn't know you? It feels personal to him.

You're requesting a meeting at a specific date and time. He needs to read enough to determine what you want, then check his calendar to see if he can meet. These subject lines are successful because even though people no longer feel a sense of obligation to return every message, they do **feel more obliged to RSVP** to a meeting invitation.

Another subject line approach you might use is to **share an insight** or tip you have for the prospect. Try:

- A hiring idea
- A thought about managing distributed files
- An idea about using your IT to grow client satisfaction

**People love a new idea** related to their job. Don't share the thought here though. Tease your prospect with enough information about it to entice a response and start a conversation. Suggest a time to discuss it in more detail with them.

Bottom line, make it personal to them, but in a way that doesn't sound like a marketing email.

**Steer clear of gimmicks** like "Enticing Ideas: Kendra Lee, Did You Catch the Wave?" This didn't have anything to do with me even though it put my name in the subject line. It was clearly a marketing message. No action was required on my part. There was no sense of urgency or compelling reason to open it.

In three seconds it hit my delete barrier. Gone without reading more than the subject line. Don't let that happen to your emails.

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*Bottom line, make it personal to them.*

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# Attract Prospects with Easy Web 2.0 Techniques

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**The Internet is my best friend for attracting new prospects. In a flash my name and an article I've authored have "gone viral." I'm promoted all over the world and I'm suddenly the expert everyone wants to talk with. Leads start flowing in from people I've never met and new opportunities abound.**

*Is it magic? No! It's Web 2.0, and you can do it too with little investment other than your time.*

Don't know what Web 2.0 really is, and therefore afraid you can't leverage it? It's simple. According to Wikipedia and expert Tim O'Reilly, the first person to really start talking about it, Web 2.0 isn't a new technology. Rather, it's a change in the way people use the Web. They leverage it as a platform to facilitate communication, secure information sharing and collaborate.

And that's what makes it such a great tool for alluring potential buyers to you.

Your objective is to get your name out in front of your target audience and raise yourself to expert status through your message. Once your prospects know of you and your company, they start listening, and when a problem arises, you're there in front of them.

Here are some of the cool options available to keep you close without much effort.

## Articles and Blogs

As sellers we write emails and proposals sharing our ideas as part of our everyday job. Turn your sales writing into short articles you can post online and have e-newsletter sponsors solicit from you. Some great sites to post articles are [www.evancarmichael.com](http://www.evancarmichael.com), [www.myventurepad.com](http://www.myventurepad.com), and [www.ezinearticles.com](http://www.ezinearticles.com).

Write one article at a time, then post it to multiple sites. Ask your clients which sites they frequent and what newsletters they subscribe to. Work to get your articles posted to them.

Post your articles on your own website or blog, too. Put them on yours first so that your site is the initial place search engines find them.

If articles are too much work right now, try blogging. If you already have a blog, great! If not, write on other people's blogs. I find that a comment I've posted to another person's site often prompts a 250 word response or an exchange with different readers, and before I know it, I have an article with little effort. At the very least, my name is now present in other locations on the Internet.

## Podcasts

Stretch yourself beyond articles and put your sales presentation ability to work for you. Create a few quick 2 to 12-minute podcasts for your website.

Make them relevant tips for today's challenging times. Reference them in articles you write and offer them to the article websites.

For people who prefer to listen more than read, you've hit the mark. The added bonus is that anyone who listens hears your personal style and professionalism and begins to get to know you. That's the first step in attracting new prospects.

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*...Web 2.0 isn't a new technology. Rather, it's a change in the way people use the Web.*

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## Attract Prospects with Easy Web 2.0 Techniques (continued)

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### Social networks

If you haven't already, set up a profile on LinkedIn or Facebook. As your title, include a descriptor of your areas of expertise. Saying that you're an IT security expert means more than noting you're an account executive. If new prospects check you out before calling, and they will do it, they'll get a clear picture of your capabilities.

Get some recommendations. Testimonials freely posted in a social network carry more credibility than the ones you post on your website or include in proposals. Not only that, but they're available for anyone who views your profile. Ask your best clients to post references for you.

Start posting recommendations for others. People who see your recommendation may click on the link to your page to learn more about you.

Update what you're working on or thinking about once or twice a week. Estimated effort, two minutes, and anybody in your network who looks will know. Mine currently says "Kendra's helping a group of technical reps improve their referral gathering and prospecting approaches." It keeps your connections informed and if they have similar issues, they'll contact you. I've received leads from people who've only read that little tidbit.

Use Web 2.0 to get your name out in cyberspace and become the expert others turn to. Before you know it you'll be attracting new prospects who have prequalified their need for your assistance simply from the snippets they've heard. Those are the leads we all strive for!

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*Use Web 2.0 to get your name out in cyberspace and become the expert others turn to.*

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**What are you waiting for? Update your LinkedIn and Facebook profiles today.**



# Create Opportunities in Our Tough Economy

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**Every day we're hearing about how tough it is out there. Prospects won't take calls. Budgets are on hold. And yet, I remain optimistic, seeing opportunity all around us. While many clients are halting spending, others are getting creative and looking at their businesses from new perspectives. They are seeking ways to leverage these difficult times and evolve their own companies. They refuse to let the difficult economy stall their growth.**

One client I was speaking with the other day said I must be an eternal optimist, refusing to face reality. Maybe. But that same day I had four new contacts call me.

In a recent conversation another client told me that all budgets are frozen for 2009. They wouldn't be able to proceed with the project we had envisioned. We tabled the project, yet when we got off the phone, we had another appointment set to discuss two top priorities that just can't wait for the budget.

What's happening? Am I so different than you are? No! Creating opportunities is all about keeping your name in front of potential customers, listening hard during sales calls, and thinking deeply to make creative suggestions. You can do it, too.

## Get Close

While prospecting is discouraging right now, it's also the time to stay in front of your prospects as if they're your best buddies. Where it used to take 9 calls to get a call back, you can be sure it'll take many more. Instead of giving up, plan an attraction campaign. In my opinion the most effective strategy today is a combination of phone calls, emails and simple events to catch prospects' attention. Focus on hot topics, relevant to their very highest priorities in the new economy. Be there when they recognize a new need they can't hold off investing in. They'll call you first.

## Keep the Conversation Going

Listen for opportunities in novel areas. Your clients may be holding back purchasing your typical offerings, but in dire need of one of your lesser known solutions. When they tell you all spending has been curtailed, don't stop the conversation. Keep questioning and conversing. Identify their top priorities for succeeding in this strange market. As they talk, listen for unusual ways you can assist them. Don't thumb your nose at minor projects. Nothing is too small to get your foot in the door and show the financial return you provide. My philosophy is that small projects add up to big numbers, and I appreciate every one!

## Wake Up Your Brain

Life has been pretty good for us sellers over the last few years. We didn't have to work too hard to uncover our prospects' needs. They budgeted; we spec'ed; they bought. Maybe there was a bit more work than that, but for the most part, it was definitely easy compared to today. It's time to wake up your brain and show your clients how you can help them save more, make more, and still grow their businesses. Get creative. Think outside your normal solution box.

I've had my fair share of losses just like you've probably experienced. But I'm not letting them get me down. Rather, I'm using today's economic troubles as an opportunity to get creative.

One seller I work with was desperately trying to close a new phone system. The customer couldn't justify the investment. However, during the conversation he mentioned the extraordinary amount they were spending in marketing and his desire to reduce it. The seller realized the phone system could help track effectiveness of marketing campaigns, allowing his customer to quickly halt poor performing programs. The savings became clear to him, far outweighing the cost of the new phone system. He looked at the seller and said, "This is a no-brainer"—and bought.

We don't know how long this recession will last. If you are staying in front of prospects, listening hard and presenting creative ideas, you'll win regardless—and win big when the economy starts to turn again.





# Finding Alternate Lead Sources within Your Company

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**Many sales reps often overlook valuable lead sources within their own company, and spend precious selling time looking for leads outside their office doors. They attend networking events, travel to conferences and trade shows, partner with other sales reps, and research potential external lead sources, but rarely consider all the invaluable sources of information around them.**

What they fail to realize is that some of the best sources for leads and customer information are fellow employees who work with current customers as part of their everyday job. For example, coworkers in customer service, human resources, accounting, and administration are dealing with and speaking to important customer contacts every day. They are often made aware of key information in their ordinary conversations that could be very useful to reps. This information can help reps adjust their sales strategies and ultimately lead to significant sales. If a sales rep can determine who “touches” their customers on a regular basis, they can establish a steady information and lead source within their own company.

By first considering the kind of information they would like to gather from a source, a sales rep can begin to develop potential internal sources and guide their sources’ conversations with customers. Desired information might include insight into the account, if there are any new contact people in place, if there are any pending organizational change, or if new products or services are being introduced. Using this information, a sales rep can very likely discover additional needs within an existing customer organization that they can help to address.

Some ways a sales rep can guide and train internal sources to provide leads:

- Providing a list of questions or information to gather as the conversation allows.
- Including them in account planning sessions or territory reviews. This elevates them to be part of the team and communicates your vision and direction.
- Following up on a consistent basis. This reinforces how serious you are.
- “Giving back” with some form of bonus. A gift certificate or dinner out are always appreciated, and will keep you in their mind whenever an opportunity arises.


Some contacts will also view their work with you as a way to support the company and advance their own career. For example, there may be customer service reps who are looking for a way to become sales reps and by sharing valuable leads could in fact change their role with the company.

Mutual respect and better communication are critical success factors in generating internal leads and creating internal partnerships. A sales rep and internal resource must respect the role each person plays in the company and their unique value to the customer. Internal partnering will open the lines of communication between different departments, ultimately strengthening the company while also generating additional sales.

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*If a sales rep can determine who ‘touches’ their customers on a regular basis, they can establish a steady information and lead source within their own company.*

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# Fill Your Pipeline by Refining Your Referral Requests

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**Lately I've heard a lot of people talking about how to get referrals. No doubt about it, they're one of the quickest ways to fill your pipeline. They're definitely easier and less stressful than cold calling. They're more accessible, and there's less competition to close the deal. Knowing this, more and more sellers are asking for referrals as a primary approach to filling their pipelines.**

But they aren't getting the number of high quality referrals they'd like or need.

## **The techniques we're hearing aren't working consistently.**

That's because so often we leave it up to the client to guess who they should refer us to. If you really want to be successful building your pipeline with referrals, you need to take a step back and think about what types of introductions you really want.

## **Just any old referral won't get you your next hot prospect.**

When you leave it up to your customer to figure out who they think would be a good referral, they won't consider all the qualification points you do.

They might not recognize that **they're a great client because they're:**

- Focused on issues that fall within your offerings' sweet spot
- Using your solutions exactly like you want other customers to
- In a specific industry or a certain size company
- Treating you as a trusted advisor

Suddenly you find yourself with a referral that's less than ideal. It's too small a company, has a completely different set of needs than you address, or is outside your industry expertise.

Because the referral came from one of your top clients, you either have to figure out how to say "thanks, but no thanks" or follow-up then explain to your customer why it wasn't the best fit. It's possible you could actually waste as much time following up on this unqualified introduction as you would cold calling!

**A poor referral from a great client puts you in an awkward position**—all because you were trying to shorten your new business development cycle through referrals. Mediocre connections won't help you fill your pipeline.

No, **you only want top quality referrals.** Your desire is to get introduced to companies and contacts that really need your offerings and will want to talk with you. You're looking for new connections with the characteristics of your best clients.

Don't limit yourself to asking for referrals that are similar in size, industry, or region.

**Broaden your expectations to seek introductions to people** who'll implement and appreciate your offerings like your best clients do. Ask for contacts who'll want to work closely with you and welcome your expertise and recommendations.

To get referrals that fit such specific qualifications, you need to frame who is a great connection when you ask. Tell your customer what types of companies make the best match for your offerings.

There are **two parts to framing your referral request.**

- Say, "someone like you who..."—and fill in the blank with the profile of your ideal referral.
- Then add, "someone who needs..."—and include the classic challenges, issues or needs you address.

What you're doing is creating a picture of your ideal referral for your client. Now as they mentally search through all their colleagues, they can easily determine which ones to recommend. You've taken the guesswork out of it.

**Call me a referral snob if you will**, but if we're going to ask for referrals, spend precious time following up on them, and then work them with due diligence, don't we deserve to get only the very best introductions? I sure think so!

# Mine Proposals for Hidden Gems of Opportunity

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**With the economy causing prospects and clients alike to clamp their wallets shut, we're looking everywhere to fill our pipelines. One place you may not have examined recently is in your past proposals, yet they could be the quickest place to find new opportunities.**

When I'm working with a prospect, I like to look further and deeper than the initial problem they see to get to all the potential issues creating it. Often the problem isn't a simple one and the deeper I dig with questioning, the more I learn about how we can solve it.

My consultative approach results in a proposal that goes beyond one recommendation. It includes four, five, six suggestions or more on things they can do to address the challenge, complete with several options of how to get started.

It's **beefy and full of ideas they can choose to implement**—or just think about for now.

And there in lies the opportunity for us in a tough economy!

If you're writing a meaty proposal like I do, often your clients will choose to move forward with only a portion of what you recommended. They liked your ideas, but budget, resources, or timing limited their initial implementation. They probably even told you they'd like to "wait and do the other things later." And, if you're a savvy seller you pinned them down to dates of when they'd do the "other things."

But busy as we are, and aware of how clients are looking to conserve spending, you may not have revisited those "other things."

Now's the time! **You could have a goldmine of opportunity right on your hard drive!**

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*Often the problem isn't a simple one and the deeper I dig with questioning, the more I learn about how we can solve it.*

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Go back and revisit your proposals from the last twelve months. Look first at the suggestions they chose to invest in.

- How's their implementation progressing?
- What progress have they made in solving the problems they chose to deal with first?
- Where do they still need help to eliminate those challenges? Do you smell an opportunity there?

Then, look at all those great recommendations you made but they elected to wait on. Here's the goldmine just waiting for you to unearth it!

- Do the issues behind your suggestions still exist?
- Could they make a difference in your client's profitability or cost cutting if fixed now?

Don't wonder. Go find out!

Set up a review meeting to do a status check with your client.

I really like review meetings. These are your opportunity to check in on how you're doing, reinforce the great work you've completed so far, and get your client's agreement on value they've already experienced.



## Mine Proposals for Hidden Gems of Opportunity (continued)

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Dust off the proposal and use it as your guide in the meeting.

The best part is, your client will remember it well. Before making any decision in the first place you know he spent a great deal of time studying it. You reviewed the document in depth with him to be sure he did!

Use the proposal to revisit the issues you originally discovered and agreed upon before you started working together. Share the areas you think you can help take the results they've already experienced to even higher levels with some simple tweaks or additions.

Next, remind your client of the recommendations you'd made.

**Discuss those things they wanted to "wait and do later."**

As you talk, the pain of those yet unsolved issues will come roaring back. Your client may see the need to address them now, especially if it'll help reduce costs, drive more revenue, or improve productivity of an already overworked staff.

Get creative and show how you can help even within their tight budget. **Your clients will appreciate the attention** you've given their problems.

Before you know it, new opportunities will surface and your pipeline will be healthy again.

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*Use the proposal to revisit the issues you originally discovered and agreed upon before you started working together.*

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**New opportunities can be found in "old" clients if you know where to look.**



# Client Communication as Easy as ABC

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**To be a successful consultative seller, you need to grow and maintain a broad base of client contacts. Before you know it, you have hundreds, even thousands of people on your contact list. Obviously it's impossible to maintain personal contact, yet personal contact is a key to building and strengthening your client relationships.**

How do you maintain and strengthen relationships with all of these people so you will be among the first—if not the first—person they remember when they have a business issue that requires your expertise?

I pride myself on my follow-up skills and strive to maintain relationships with clients long after projects have been completed. But, the longer I'm in sales, or working with a particular account, the more contacts I have. Suddenly my simple approach to calling when someone comes to mind, or when my CRM system says I should, no longer works. This is the dilemma facing many of us as successful sellers. What to do? The answer: a two-pronged strategy leveraging today's technology.

Begin with a **"divide and conquer" approach**, categorizing your contacts into tiers. The 'A' tier can include top contacts or recommenders you stay in touch with regularly. These are the people least likely to slip from our sights because they will probably buy from you soon. It's the 'B' and 'C' tiers that are the challenge.

The 'B' tier are contacts that don't have an immediate need, but may have one in the next 12 months. You may have done work for them before, or discussed places you can assist, but frequent communication at this point is not required.

The 'C' tier are contacts that may someday appreciate your services, but not in the foreseeable future.

While both 'B' and 'C' tier clients know you are there, you don't want to count on them to remember to call when a need arises that you can assist with. Yet our schedules are busy and often we don't have the luxury of calling every 'B' and 'C' client regularly to check in.

Some sellers feel it is enough to **hope that their paths will cross again in the future**. That's not definitive enough for me. As I look at it, there are two prongs to a strategy for staying connected and strengthening relationships with our legion of client contacts.

1. Keep our clients current on what we are focused on
2. Provide our clients with new ideas

The first prong is easy. **LinkedIn**, the online business networking site, shows your network "what you are working on," updating it every week, even emailing it out to your whole network of contacts you have registered. Make sure all your 'B' contacts are linked to you, and they can follow your activities every week as long as you keep it updated. As you speak with or think of them, link to your 'C' contacts.

Client relationship manager and email database technologies can help with the second prong. Use the tools in your CRM to create a nearly automated communication strategy. **Queue emails** to connect with 'B' contacts every 60, 90 or 120 days. Write an email that shares a new thought, a related issue a client had and solved that would be of interest, a return on investment another client achieved and how. As your 'B' contacts reply, call to connect voice-to-voice.

The 'C' tier shouldn't require a lot of time and effort. Add them to your newsletter list, or emails you might send out regarding updates in their industry. Plan to communicate with them every 4–6 months. Periodically send a personal email, checking in on their summer plans, how the job is going. The email queue feature is great for these because you can be sure to connect no matter how busy you are.

By dividing your contact list into tiers, and determining what you can do to effectively—and time efficiently—stay in front of them you will strengthen relationships and stay top of their mind whenever they have a need.

# **POWER**

## **PROSPECTING**

### **E-TOOLS**



# Creating a Powerful Prospecting Value Statement Resource Tool

**Directions:** Use this table to craft the 3 components of a powerful prospecting value statement. Included are 3 common prospecting situations where you will be calling: warm or cold prospects, current customers you want to get a referral from, and referrals you are calling for the first time.

Feel free to add additional prospecting situations you encounter or to modify this table in any way that will bring you the greatest value and contribute to your selling success.

<b>PAIN? (customer focused)</b> The issue or challenge the prospect may be, or is, experiencing. Most likely a challenge or pain based on a situation or compelling event.	<b>FEELING? (customer focused)</b> How the challenge is making your target contacts feel	<b>VALUE? (you focused)</b> The benefit you and your company can bring in solving the issue. Ideally includes measurable value or RIO the customer can anticipate by addressing the identified challenge.	<b>GAIN? (customer focused)</b> How your solution will address the issue as evidenced by ways that you have approached and solved similar issues for other clients. May be a change in process, skill, hardware, software, etc.
<b>Prospecting (warm or cold lead) with goal to close for a meeting or secure a referral</b>			
<b>Current customer with objective to close for a meeting or secure a referral</b>			
<b>Referral with objective to close for a meeting</b>			
<b>Target Market:</b>			



# Write Your Powerful Prospecting Email

Use the space below to write email based on the pain, feelings, value & gain you identified.

## Triggering Event

## Value

## Gain

## Initial 3 qualification questions

## A Powerful Value Statement Example

### Target Market: Law Firms

#### Triggering Event

Many **partners in law firms your size** have been **frustrated** when they or their employees were **unable to respond to client needs** due to computer problems.

#### Value

Last year we helped a 50 person law firm increase network uptime to 99.9%, and reduce IT operating expenses by 32% from the previous year.

#### Gain

For the past 12 years, **we have helped** small and medium sized businesses **contain IT costs**, and increase the effectiveness and the efficiency of their people and processes.

#### Begin qualification questioning

- What is the biggest **frustration** that you have experienced with **computers** in your **firm**?
- Does that happen often? How did you address it? Is that how you typically address problems with your computer systems?



# PowerProspecting Call Plan

Target Market:

Target Contact Title(s):

Opportunity:

Type of Contact: ☐ Personal Visit ☐ Phone Call ☐ Email ☐ Letter / Note

Prepared By:

Date Prepared:

## Our Prospecting Goal & Objective:

(What's our goal in making contact? What must we have accomplished at the end of the meeting to satisfy the goal?)

- Gather information to qualify if this is a company to set an appointment with
- Uncover a new opportunity and set a phone or face-to-face appointment
- Get a referral if this is not the best person to speak with for our offerings
- Leave a positive, lasting impression that makes the prospect want to keep an appointment with me or take my next call

## What's in it for the Target Contact?

(What's the value to the target contact in talking with me? Why should the target contact agree to a phone meeting or face-to-face meeting with me?)

## Prospecting Value Statement

(What is my powerful prospecting value statement to the contact that will make him / her want to schedule a first meeting with me? What pain, value and gain will I use that will interest him / her?)

## Gatekeeper Prospecting Value Statement

(How should I tweak my powerful prospecting value statement for a gate keeper on why he / she should allow me to speak with the target contact? What pain, value and gain will I reference?)

## Qualification Questions to Ask

(What questions do I need to ask to understand the target company's unique business situation and to qualify if I want to set an appointment with this person?)

## Information I need from the Gate Keeper:

(What information do I need from the gate keeper to better understand the target company's unique business situation, who I should be working with in the company, and to qualify if we might have a solution to the company's needs?)



<b>Objections To Anticipate</b>	(What potential objections might the contact or gatekeeper have in giving me the first appointment, or even in speaking with me right now? How will I address them?)
<b>Information to Provide</b>	(What thought-provoking information must I give the prospect during our conversation to get the first appointment? How are other clients using our offerings to support, protect or enable their business that may be relevant to this target market?)
<b>Target Contact's Next Step</b>	(What do I want the target contact or gatekeeper to do at the end of the call to ensure the prospect keeps the appointment?)

# Defining Your “Best-odds” Target Markets

**Objective:** Define your “best-odds” target markets to help quickly qualify and pursue profitable prospect opportunities.

**Instructions:**

1. Ask yourself the question, “What characteristics does a great prospect have? And what types of prospects do I know I should never work with?” Then list the “Best-odds” and “Poor-fit” characteristics for your prospects. If you need help, think about your past sales and your current forecast as guides.
2. Use the characteristics in your “Best-odds” column to define target markets or groups of prospects you can target with your prospecting. You’ll have the “best-odds” of uncovering new opportunities with these prospects.

This tool is based on Chapter 6, *Segmenting Your Territory Into Target Markets That Work For You*, in the book ***Selling Against the Goal***.

Target Market Characteristics	Best-odds Characteristics	Poor-fit Characteristics
1. <b>Geographic:</b> A defined geographic region or area	(Nebraska, south of 6 <sup>th</sup> Ave, in the Metro-Philadelphia area)	(Outside our 2 state-region, rural areas, 50 miles+ from our office)
2. <b>Industry</b>	(Medical clinics with 10-100 employees, distribution companies with >3 sites)	(Hospitals, distribution companies with <3 sites)
3. <b>Business need or issue:</b> Business issues you are in the best / worst position to address with your solutions	(Employees requiring remote access; security is a critical concern; HIPAA IT compliance)	(No issues with their managed services provider; don’t value IT)
4. <b>Line of business:</b> ideal / least favorable department within the business to be selling to	(Accounting, HR, Sales, IT)	(Purchasing)
6. <b>Title:</b> ideal / least favorable title of contact to be selling to; the decision maker	(CFO, IT manager, business owner, office manager)	(Purchasing manager, owner’s assistant)

Target Market Characteristics	Best-odds Characteristics	Poor-fit Characteristics
6. <b>Size of company:</b> ideal / least favorable size of a prospect	(# of employees, # locations, revenue, etc.)	(# of employees, # locations, revenue, etc.)
7. <b>Year-to-year revenue growth:</b> If this is a good characteristic for you to consider	(Fast growing)	(Experiencing a merger, up for sale)
8. <b>Purchase history:</b> Look at how often your customers tend to purchase	(Renew contracts annually, engage in project work 4 times a year; accustomed to paying for outsourced services)	(Buy every 3 years; 1 project per year; have never used third party suppliers)



# 33 Tips to Get Past the Gatekeeper

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1. Ask the gatekeeper for help.
2. Start at the top. Explain why you are calling and ask who is the best person for you to speak with.
3. Ask for the Sales or Marketing department. Gather background information, get contact names, and develop a message based on the company's business needs.
4. Research to get the best name and then ask for the contact by name.
5. Check your social network for a connection to secure a referral and hot message to use.
6. Research the contact on your social networks to look for similarities you can use in an email or the first conversation.
7. Follow-up, follow-up, follow-up—even a year later. The prospect may not have made a decision or may have another need.
8. Leave a message or don't leave a message—that is the dilemma. We recommend leaving a message to begin to convey your personality, professionalism, and value.
9. Leave your message with the assistant and keep talking to build rapport and establish a relationship.
10. If you don't have brand recognition, plan to call and leave messages at least 9 times over 3 weeks. Leave a message only every other day even if you call more frequently.
11. Ask the gatekeeper to schedule time on the contact's calendar; request a 15-20 minute appointment.
12. Follow your voicemail with an email.
13. Mention you are sending something; then ask information gathering questions as you collect mailing address information. Be sure to send something as promised.
14. Mention how you've helped improve operating expenses for other companies (or whatever it is you help improve that will grab the prospect's interests.)
15. Do your research on the company before dialing; then use it in your conversation. Avoid a product discussion. PowerProspecting 33 Tips to Get Past the Gatekeeper
16. Focus your opening statement on the business issue you suspect the prospect might have.
17. Use: "I'm in town visiting another client and would like to stop by." Or, "I'll be in your building and wanted to drop off some information." Ask to meet the gatekeeper to get to know him or her if you can't get an appointment with the prospect. Call back and ask for an appointment once you've met.
18. Smile throughout your conversation. Use a mirror to watch your expression. You'll sound more approachable and personable.
19. Thank the gatekeeper for his or her time.
20. Call before hours—after hours—during lunch hour—on weekends.
21. If you have a referral, ask the person who referred you to call or send an email as a personal introduction.
22. If you don't have a referral, use a reference of a client with a similar business issue and discuss how the client addressed that issue.
23. Quote real business results in dollars and cents.
24. Avoid talking too much. Use prepared questions based on your research. Listen. Ask for guidance and don't assume.
25. Stretch to warm up before you begin calling—visualize the flow of successful calls—then dial.
26. Send a handwritten "thank you" note to the gatekeeper before and after speaking with them.
27. Use a series of 4 letters spaced over 4 weeks to get attention— then call.
28. Have coffee and bagels delivered with a personal note and some brief literature or a letter to read while enjoying them.
29. Send a short letter about how you've helped other companies like the prospect's, including financial benefits.
30. Send a package with 1 shoe and a note that reads, "Now that I've got one shoe in the door, can we meet?"
31. Send a personal, handwritten note requesting an appointment.
32. Send a lumpy letter, including something that will catch attention.
33. Remember to watch your investment of time, money, and energy. If it gets too high, move on to another prospect.

# Meet Kendra Lee and the KLA Group

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Kendra Lee is the driver of the PowerProspecting Sales Kit and president of KLA Group. She's also a top IT seller, prospect attraction specialist and sales advisor who knows how to shorten time to revenue in innovative ways—even in a challenging economy. She's the author of the award winning book *Selling Against the Goal* and is a popular speaker at annual sales meetings and channel events

Specializing in the IT industry, KLA Group works with manufacturers, distributors, and channel resellers to break in and exceed revenue objectives in the Small and Midmarket Business (SMB) segment.

**Under Ms. Lee's direction her organization has assisted sellers in:**

- Increasing referrals more than 328% in just 7 weeks,
- Penetrating SMB markets in just 6 weeks, and
- Driving new client acquisition more than 31% year over year.

**Clients frequently send emails to share successes such as:**

- "With your help, I reached an elusive executive in just 1 day after two months of failed attempts. Now we're taking over management of their IT system across multiple locations with a 12-month contract."
- "I secured an appointment for a \$175K opportunity by changing my prospecting approach with your techniques."

**To find out more about KLA Group or have Kendra speak to your organization:**

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Specializing in the IT industry, KLA Group works with companies to break in and exceed revenue objectives in the Small and Midmarket Business (SMB) segment.

To find out more about the company, read the latest articles, or subscribe to our weekly tip and e-newsletter visit [www.klagroup.com](http://www.klagroup.com)

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