5W14 - MSP Lead Generation/Appointment Setting Blueprint

Instructor: James Kernan

Last Updated: 07/10/2022

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| **SKU** (e.g. 5W14): 5W14 |
| **YouTube Video Intro URL:** |
| **Next live offering starts**:  |
| **Prerequisites:** |
| **Recommended:**  |
| **Pathways** **Core Option for:**  **Elective for:** [ ]  Management [x]  Management[ ]  Technician [ ]  Technician[x]  Sales & Marketing [x]  Sales & Marketing[ ]  Service Manager [ ]  Service Manager[ ]  Front Office [ ]  Front Office[ ]  Foundation |
| **Features** (Top 5 learning outcomes as bullet points) 1. Outcome 1: How to create your sales playbook
2. Outcome 2: Appointment setting 101
3. Outcome 3: How to run the first and second prospect meeting
4. Outcome 4: How to make customers for life – secrets to valuable QBR’s
5. Outcome 5: How to create and present fantastic proposals that close
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| **Short Description** (1-2 sentence that begins with a verb- “Learn how to,” “Find out how,” etc.):Learn the industry’s best practices on the overall sales process from Prospecting, Qualifying, Needs Analysis and Assessments, Connecting your value proposition to the customers issues. Tips to get through the Sales Process faster and Closing the Deal! |
| **Long Description**:The MSP Lead Generation and Appointment setting course will include five live training sessions delivered in 60-minute classes. Designed for technology business owners, sales managers, and sales professionals, this training program covers industry best practices for selling contractual monthly recurring revenue and finding new accounts.All five sessions will be recorded LIVE and delivered with a PDF workbook and related template exercises. For more information on James Kernan or Kernan Consulting please visit: www.KernanConsulting.com |

**Class Outline:**

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| Module 1: **Introduction** |
| Unit 1: Introductory Video and Instructor Information (open to public)[ ]  Syllabus Uploaded |
| Unit 2: Live class schedule and Zoom registration link (Registered students only) |
| Module 2: **Class Content** |
| **Unit 1 Title**: Creating your Sales Playbook |
| What you’ll learn (1-3 sentences): We will review sales strategy and help you create your own playbook to share with your team.  |
| Objectives (list 3-5):1. Documented strategy and sales processes for everyone to follow
2. Campaigns to attract new prospects
3. Creating your USP and messaging for your target markets
4. Setting up your team and creating goals
5. Identifying your strategic partners to go to market with
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| Quiz – Unit 1 |
| **Unit 2 Title**: Appointment Setting 101 |
| What you’ll learn (1-3 sentences):We will teach you the tips and tricks of getting past the gatekeeper and connecting with decision makers. How to create a reason why you are calling and how NOT to be so salesy!How to talk to busy owners and NOT waste their time. The process to nail down your appointment and get the prospect to keep it. |
| Objectives (list 3-5):1. How to identify your ideal prospect
2. How to get through to the decision maker and gain their attention
3. Review the qualification process and nail down appointments
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| Quiz 2 – Unit 2 |
| **Unit 3 Title**: 3. The Sales Process and how to run your prospect meetings |
| What you’ll learn (1-3 sentences):From creating an agenda to running your first meeting with a prospect. We will review the steps to take through the sales cycle. What key objectives you want to have during each meeting and how to prevent “ghosting” in between meetings. How to control the sales process so you don’t waste months chasing bad deals. |
| Objectives (list 3-5):1. How to build credibility “prior” to even showing up to the meeting
2. How to motivate busy executives to take and keep the meeting
3. What strategy and goals do you have each step of the way.
4. How trial closes during each meeting help move shorten the cycle.
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| Quiz 3 – Unit 3 |
| **Unit 4 Title**: How to keep customers for Life – secrets of QBR’s |
| What you’ll learn (1-3 sentences):We will review the industry best practices for QBR’s (Quarterly Business Reviews) and most importantly how to make them meaningful to the customer. How to hunt for new business from existing accounts. |
| Objectives (list 3-5):1. Create your QBR process
2. Who should you be meeting with and why?
3. Technology planning for the customer
4. Communication/Meeting Schedule
5. How to use the “denial of services” letter without losing the client
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| Quiz 4 – Unit 4 |
| **Unit 5 Title**: Creating and Presenting Winning Proposals |
| What you’ll learn (1-3 sentences):Creating and presenting good proposals is an area where most MPS’s struggle. Many don’t have the tools, process or understanding to position themselves to win! We will help you create your template proposal, and streamline your process. Also how to present your solution so the prospect says YES, instead of I’ll think about it. |
| Objectives (list 3-5):1. Create your proposal template
2. Streamline your quoting process
3. How to overcome objections
4. Learn Trial closes
5. How to present your proposal so the prospect says YES!
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| Quiz 5 – Unit 5 |

Notes:

On the unit pages on the website, the videos with subtitles and transcripts will be added after class for accessibility.