YOUR LOGO HERE

**Sales Playbook**

**2022**

**Path to Success**

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# YOUR COMPANY Vision

YOUR COMPANY partners with our clients and help them run their businesses better by providing technology components and world class, white glove services that are fast, efficient, and economical, relieving them from the distractions and difficulties of personal administration. YOUR COMPANY is a complete, end-to-end resource that allows organizations to fully leverage technology, while maintaining focus on their core business.

YOUR COMPANY is building a reputation centered on Biblical principles and values, while providing solutions and expertise of the highest quality, adhering to industry standards, and giving attention to the smallest details. With our firm’s commitment to client satisfaction, we are positioning ourselves to become the leading managed IT Service Provider of network-based business solutions.

# YOUR COMPANY Mission Statement

We Provide Cutting-Edge Technology Solutions Helping Our Clients Grow Their Businesses and Profits.

# YOUR COMPANY Core Values

* **Excellence in the Ordinary**: People doing ordinary things but doing it with excellence
* **We Shoot our Sacred Cows**: We don’t do things just because we have always done things that way. If one cannot answer the question why we are doing things in this way, it’s a sacred cow and we shoot it.
* **Crusade Mentality**: You either love it or leave it. If you are not passionate about the why we are here, you do not need to be here.
* **Take ownership.** When a problem occurs or when a negative occurs you never try to blame someone for that or point fingers at someone that may have cause that. Your job is to look at what can I do to resolve that problem right now.
* **No Gossip**! Period!
* **We are not here for us.** It’s not about us. It’s always outwardly focused to whom we serve. YOUR COMPANY Product and Services

## Products

### Firewalls

YOUR COMPANY is capable and trained to administer Cisco, SonicWall, Fortinet, and WatchGuard firewalls. However, for the sake of standardization, we lead with Fortinet firewalls. However, if a client’s demands a certain brand we can accommodate.

The unique benefit to standardizing is tied to Service Level Agreements (SLA’s) and ensuring our staff has the potential to reconcile and remedy issues and deployment of firewalls. Firewalls are at the core of the organizations’ connectivity and must have unparalleled expertise and standardization to ensure maximum uptime. Standardizing also allows us to gain the greatest discounts to pass on to our clients through volume sales.

### Workstations / Laptops

YOUR COMPANY resells Dell, Hewlett Packard and Lenovo workstations.

The unique benefit of reselling Dell, Hewlett Packard or Lenovo workstations is the ability to again become experts on the hardware, their operations, potential and abilities to perform certain functions requested of us by our clients. These devices have a great price point for the value and can ensure the clients use of 3-5 years between hardware refreshes. These devices also allow for multiple monitor use without the expense of further hardware purchases unless the client is requesting a device for CAD or graphics vector rendering.

### Servers

YOUR COMPANY resells Dell, Hewlett Packard Enterprise (HPE), INTEL and Lenovo Servers.

The unique benefit to Dell, HPE and Lenovo servers are their availability in the chain as well their ability to “build” and customize the server for the client based on our specs needed without any further cost from the manufacturer allowing us to pass on savings to our clients and win deals when hardware margin can be as low as 5-10%.

### Disaster Recovery Devices

YOUR COMPANY primarily uses DATTO devices for disaster recovery and business resiliency. DATTO allows many different devices in size and offsite service to accommodate most clients.

The unique benefit of using DATTO is their United States data storage facilities and their product support and goal to catapult its partners. DATTO does not sell to end users only to VAR’s in the channel.

### VoIP

YOUR COMPANY primarily uses Allworx and Cytracom phone services. These three vendors allow us to create cloud only as well as local system VoIP offerings.

The unique benefit to using these vendors is again standardization, knowledge of systems, pricing, warranty and their end user, vendor support.

## Services

YOUR COMPANY provides a wide array of services as well as upselling services to have our vetted vendors to perform the labor. Outside of Managed Services, we offer general consulting to include but not limited to project based work, Security, Storage, Migrations, IT department service augmentation, network cabling and carrier services,

### Projects / One-Off’s

YOUR COMPANY was founded on the principle to take all work available. As we have grown, we have realized we cannot do this and perform the amazing work we do and service our clients to way we have been called. We will evaluate all hourly or project work based on workload, the prospect and their vision. Our goal is to sell recurring support contracts. If we believe a customer will never be open to that, then we may reconsider selling them services.

These types of projects can consist of emergency support of network or systems, hardware replacement or simply an audit.

### Network Audits

Network audits are normally provided free of charge to prospects to help secure the opportunity and provide consulting value while allowing us to present a detailed report of Networks, Security concerns as well as the Microsoft Exchange email systems. These can provide tremendous upsell opportunity as well as position YOUR COMPANY as the trusted advisor to the prospect and hopefully client.

We also provide network audits to current client at a fixed fee based on the size of the network.

### Managed IT Services

YOUR COMPANY provides several plans of Managed IT Services. YOUR COMPANY is a Managed Service Provider or MSP which can act as the small to medium businesses IT department, remotely. Our MSP model allows us to provide remote services approximately 85-90% of the time. MSPs can also act as an extension of an already existing IT department, taking care of routine IT infrastructure monitoring and management around the clock—freeing up the client’s internal IT staff to focus on higher-value projects. By proactively monitoring and maintaining one’s systems, an MSP can help the client avoid many technology problems in the first place. Should an issue occur, and experienced MSP can troubleshoot and resolve it more efficiently.

# Target Market

Our target market has expanded over the past year while using Google AdWords as our primary marketing and prospecting tool. However, now we are going to target our current lead list until they are exhausted. We will begin to focus on Professional Services Engineering firms as well as Finance and Insurance agencies with 10 or more users.

Our demographic is a younger company, growing fast within a market bearable of that growth. We will market to the metro YOUR CITY and surrounding areas – However we do support clients in other cities nationally and have access to subcontractor companies through our service network.

# YOUR COMPANY Universal Selling Proposition (USP)

YOUR COMPANY is an integrity driven, results proven, system integrator linking services, strategy, systems, and infrastructure through creative thinking and innovative technology solutions. We merge bleeding edge products and services with a pragmatic approach to current and future clients’ needs and budgets, partnering together for success.

# YOUR COMPANY Sales Procedures

## Code of Conduct

Everyone is a salesperson! Yes, that’s right. Every teammate in YOUR COMPANY who is client facing (ALL OF YOU) represent this organization in a way that make or break a sale. Our sales process begins with our current clients and how we handle ourselves with them. This section is NOT a suggested section for process but a proven and tested solution to how we present ourselves and conduct business the YOUR COMPANY way!

## Sales Dress Code

All sales personnel inside and outside, should be dressed professionally. If you are visiting a client/prospect you should be in a suit and tie for men and a conservative business suite for women. Women are NOT to show too much leg or cleavage nor too form fitting clothes to misrepresent the conservative corporation of YOUR COMPANY.

Men and women are NOT to wear too much cologne or perfume and must ensure that immaculate hygiene is kept while representing YOUR COMPANY.

## Answering the Phone

While either in the office or on your cell phone provided by YOUR COMPANY with a call be forwarded, etc. the following script must be maintained:

“Good Morning [or Afternoon], thank you for calling YOUR COMPANY, this is David, how may I Serve you?”

The phone must be answered no more than 3 rings and should be answered with a smile as clients can hear a smile through the phone.

If a phone call is NOT answered that reduces the opportunity for you to grow with YOUR COMPANY and reduces potential commission. Our internal call routing procedure will find the next the available sales person to handle the call.

## Voice Mail

Voice Mails on desk phone and cell phone should be congruent with one another and must reflect your status and an alternate person to reach if an emergency arises.

All phone calls and messages must be returned the same day.

## Prospect and Client Meetings

As a representative of YOUR COMPANY and adhering with our code of conduct the following rules must be adhered to while conducting meetings with prospects or clients:

* Must not meet prospects or clients in bars, strip clubs, night clubs or other areas that will diminish the message of our vision and core values.
* Must not go to hotel rooms of either male or female prospects or clients.
* Must not fraternize, pursue or otherwise seek to create a connection or potential for a hookup with any clients, prospects, or business partners.
* Must not use foul language.
* Must NOT engage in gossip.

## System, Software and Daily Job Functions

As a team member of YOUR COMPANY and a leading provider of IT Solutions in YOUR CITY you must be proficient on the following systems, applications and functions of your role:

* Phone System
  + Answering the phone
  + Transferring a call
  + Setting up voice mail
  + Parking a call
  + Intercom usage
  + Calling from CRM
* CRM tool
  + How to create a contact and business?
  + How to update current records?
  + Verify and scrub all prospects and ensure they do not go stale
  + Connect to LinkedIn with every prospect
  + Ensure every prospect is on our monthly newsletter and tech-tip card email list
* CRM tool
  + Manage and maintain clients and prospects that may have quotes or opportunities pending. Once a quote has been presented all communication and work must be handled in CRM tool.
  + Pipeline Reports
  + Follow up on Activities
  + Sales reports
* Quotewerks
  + Able to create quotes and update opportunities

## Appropriate Use Policy (AUP Training)

* Handling Company Data
* Phone Usage
* Cell Phone Usage
* Text Messaging
* Computer usage
* E-mail usage

## Processing an Agreement

Agreements are processed and created in CRM tool. Each level of MSP agreement has an agreement template to use. The prospect will sign the contract in person from your printer PDF and have the client open the electronic quote sent via your iPad so it can be process there as well. Electronically signed quotes are mandatory as the client is automatically emailed a copy and this will flow into the clients account in CRM tool with all revisions and signature.

All changes to agreements, discounts, etc. must be approved by management.

Once signed, please scan and save to the “Signed Managed Services Agreement” folder on the server using the following naming convention: [Client Name] [Agreement Name] [Date]

## Collecting Payment

Billing is in advance and the first month and the setup fee must be collected prior to agreement being started. YOUR COMPANY accepts check, Master Card and Visa. AMEX in extreme emergencies.

Provide client with **EBT and credit card processing form** and determine if the credit card will be used for all monthly billings.

## How to Handle an Unhappy Client?

If there is any concerns or tensions with clients or prospects, please bring to management attentions. Let the prospect know that you will be escalating the concerns to be handled by management. This must be escalated, and management contacted the same day.

## After the Sale is Closed

At YOUR COMPANY we do NOT sell and forget. We must nurture the client, follow up, make site visits, upsell, etc. The sales person retention commission depends on this. We value relationships and want our clients to experience an amazing, value building business relationship.

# Salary, Commissions, Sales Goals and Quotas

YOUR COMPANY Sales compensation plans are based on a salary plus commissions which is dependent of experience. Commission are paid monthly and is calculated based on profit of each scheduled item.

## Hardware & Labor

Hardware profit is calculated as total monthly cost of goods sold minus total monthly retail cost. Labor is calculated as total labor burden minus total of labor sold for the month. The numbers can be adjusted up or down anyway you wish. Also, this is based on the monthly total not on a per deal circumstance.

## New Subscription Agreements

New agreements are paid also by a monthly total. The percentages relate to the monthly fee associated with the agreement so if you look at the table 1.1 a sales person sells three new agreements totaling $3,500.00, that sales person will be commissioned $3,500.00. If the salesperson sells $4,700.00 in agreements for the month, he will receive 100% of that $4,700.00. Commissions are paid on paid invoices. If a customer doesn’t pay for something you sell, then you will not be paid commissions on that transaction.

## Commissions

## Table 1.1

|  |  |  |
| --- | --- | --- |
| **Per Month** | **Hardware & Software Sales Profit** | **Commission Percentage** |
| 0 - 8,000 |  | 0% |
| 8,001 – 14,999 |  | 5% |
| 15,000 - 24,999 | **15K Quota** | 10% |
| 25,000 + |  | 13% |
| **Per Month** | **Project Labor Profit** | **Commission Percentage** |
| 0 - 4,000 |  | 0% |
| 4,001 - 14,999 |  | 8% |
| 15,000 - 24,999 | **15K Quota** | 12% |
| 25,000 + |  | 15% |
| **Per Month** | **Total MSP Contracts Profit\*** | **Commission Percentage** |
| 0 - 1,000 |  | 100% |
| 1,001 - 2,000 |  | 100% |
| 2,001 - 3,999 | **3K Quota** | 100% |
| 4,000 - 9,999 |  | 100% |
| 10,000 + |  | 100% |
| \*The Managed Service (MS) Agreement is based on the profit of the contract monthly. The percentages are based on the total contracts sold for the current commission month. | | |
|

## Proposed First Month Commissions

## Table 1.2

|  |  |  |
| --- | --- | --- |
| **Type Sold** | **Profit of Sale** | **Commission** |
| Hardware & Software Sales | $15,000.00 | $1,500.00 |
| Labor Sales | $15,000.00 | $1,800.00 |
| New Agreement Sales | $4,000.00 | $4,000.00 |
| Mfr Spiffs (if any) | $0.00 | $0.00 |
|  |  |  |
|  | Total | $7,300.00 |

## Minimum Performance Standards

YOUR COMPANY has a minimum of activity points required before commission can be achieved. We do this to ensure the sales representative is always active and nurturing prospects and clients. To qualify for any commission level, or marketing leads each sales person must achieve 500 points a month.

## Table 1.3

**Activities and their associated points are as follows:**

|  |  |
| --- | --- |
| **Activity** | **Associated Points** |
| Admin | 0 |
| Appointment Sat | 10 |
| Appointment Set | 5 |
| Ask for Sale | 12 |
| Billing | 0 |
| Call | 1 |
| Call -- Lead List Scrub | 1 |
| Canvass Call | 1 |
| Canvass Letter | 1 |
| Canvass Package Prep | 2 |
| Canvassed | 3 |
| Demo/Assessment | 10 |
| Discovery | 5 |
| Email | 0 |
| Follow Up | 1 |
| Historical Entry | 0 |
| Inquiry | 5 |
| Lead Generation | 10 |
| Marketing | 2 |
| Memo | 1 |
| Onboarding | 0 |
| Quote | 5 |
| Renew Agreement | 10 |
| Send Shock 'n Awe | 5 |
| task | 0 |

## Daily, Weekly, Monthly, Quarterly Activities

### Daily Activities

The following items are expected on a daily basis of each salesperson:

* Voicemails updated and current
* Voice mails returned received after hours. Any voicemails received during business hours must be returned that day.
* Prospecting preparation done prior to the golden hours
* 50 dials
* At least 5 appointments set for that week
* Completion of Call Sheets

### Weekly Activities

The following items are expected on a weekly basis of each salesperson:

* Sales Meeting
* Opportunity reports
* Close reports
* Call sheet submittal
* Staff Meeting
* Networking events

### Monthly Activities

The following items are expected on a Monthly basis of each salesperson:

* Expense and mileage submissions
* Post-mortem of any issues, concerns noted
* Lead development opportunity discussions

### Quarterly Activities

The following items are expected on a Quarterly basis of each salesperson:

* Sales meetings
* Current client management meetings and discussions
* Review sales ticket history with help desk leader and determine if any management discussions are needed
* Opportunity to win the “Rock Star” belt for the quarter based on sales closed for the quarter and goals met

# YOUR COMPANY Sales Process

## The 7 Steps to Closing a Sale

1. Prospect
2. Qualify
3. Needs Analysis
4. Value Proposition
5. Proposal
6. Negotiation
7. Close and create a customer for life w/ QBR’s

## The Purpose of the Qualification Process

To make sure you’re investing your time, effort and money into “HIGH-PROBABILITY” prospects.

* This should be done by phone PRIOR to meeting with the prospect.
* Don’t qualify TOO hard; remember, you’re NOT CLOSING at this point. The goal is to get the APPOINTMENT, not discuss price, terms, delivery, etc.

## The Purpose of the Needs Analysis and Discovery

To determine if there’s a mutual basis for moving ahead.

* What’s the BHP (Big Hairy Problem)?
* What’s the RESULT they want you to produce?
* Do they have the authority to make a DECISION?
* Can they AFFORD what you’re selling?
* Can you ACTUALLY help them?
* Is there a high probability this will end up in a sale?

## The Purpose of the Value Proposition

To gather the information, you need to properly “prescribe” a solution that will produce the result they want AND to gather information that will help you close at a higher price point later.

* This may be done in the same initial meeting as the discovery
* This is where the network audit would come int play. Think like a doctor; he doesn’t ASK you what your blood pressure and cholesterol levels are. He measures them and tells you.
* Your “prescription” needs to align with what they told you they want (budget, time frame, results, methods, etc.)

## The Purpose of the Prescription

This is where you are prescribing (selling) your recommended solution.

* This is ALWAYS done in person or at a minimum, via MS Teams or Zoom.
* NEVER e-mail a proposal!! We want you face to face.
* Always present at least 2 options for a close instead of offering a single solution to avoid a “take it or leave it” option.

## The Purpose of the Close

This is where you get them to agree to your recommendations, sign the agreement and give you a check.

* Your goal is to get his done in the same meeting you are prescribing; however, it may require a second meeting to some follow-up time.
* By this point in the process, you’ve either closed it or hosed it. A mistake many people make is THIS is where they start to sell.

# Sales Process Summary

## A Lead is Generated

* By calling in
  + Phone is answered live; the Director of First Impressions qualifies the call and transfers call immediately to any available salesperson (NEVER voice mail!).
  + If no salesperson is available, an appointment is booked.
  + The prospect is called back by a salesperson ASAP to qualify the appointment and either confirm it OR cancel it.
* By online for, fax-back form, LinkedIn response, etc.
  + The prospect is IMMIDIATELY followed up on within 5-10 minutes.
  + Prospect is called at least 5 times to book the appointment.
* Prospect is qualified by phone and appointment set.
  + Prospect is entered CRM tool with complete information.
* Calendar invite is e-mailed to all stakeholders who will be at the meeting.
* Prospect connected with on LinkedIn.
* Shock and Awe package overnighted to prospect (or online shock and awe sent with calendar invite).
* Basic research of the company and prospect is done to prep for meeting.

## First Meeting

* Call is made 30 minutes prior to appointment to confirm (NOT by the salesperson).
  + Show up 5 minutes early.
  + Dress appropriately.
  + Start with a BLANK SLATE! Go in with ZERO assumptions; listen to understand, NOT just to reply!
  + Build rapport, inquire about the Shock and Awe and ask what they looked at or listened to, etc.?
  + Agenda presented with takeaway.
  + A quick overview of who you are is delivered (origin story, USP, utilize Shock and Awe).
  + Discovery is conducted problems and buying criteria (why you are there, 3 questions, wedge questions, etc.).
  + Trial close (price/budget is discussed, box close to reveal concerns, etc.).
  + Audit explained and permission obtained to proceed.
  + Next meeting date and time set.

NOTE: If the prospect is ready to buy, LET THEM! Don’t delay closing the sale if they’re anxious to buy and get started.

* Follow-up e-mail sent to the prospect the same day with the overview of what was discussed at the meeting, confirming when the audit will be conducted and when the next appointment is to reveal the “Report of Findings.”
* Audit is conducted.

## Second Meeting

* Call is made 30 minutes prior to appointment to confirm (not by the salesperson).
  + Reconfirm what was discussed/agreed upon in the first meeting to put them back in “state.”
    - Reiterate the specific problems they expressed (why you’re there).
    - Reiterate the things they said they wanted (3 questions).
    - Reiterate the concerns they expressed.
  + Discovery presented
    - How the audit was conducted?
    - Problems found, summarize by most urgent to least urgent.
    - Consequences discussed.
  + Solution presented (at least 2 options, with one being the “WHITE GLOVE” or Total Care Plan, tying in their specific goals and explaining how it will solve their stated problems.
    - Build value (sell dollars for dimes).
    - Stories used to drive home recommendations.
    - Ask which one they feel would be the best fit for them.
  + Reason to buy now (urgency) if needed.
  + Objections handled (be sure to address concerns they mention).
  + Assume the sale (“All you have to do now is okay the paperwork and we can get started as early as tomorrow.”)
* Ask for referrals.
* Post-sale follow-up conducted.
  + Send new client welcome letter and gift.
  + DEBRIEF! Make it a habit after every sales call to record what you did RIGHT and what went wrong—then improve your process and plan to prevent making that same mistake again.

# Qualification Process and Handling Inbound Leads

## Purpose

* To qualify and make sure you aren’t wasting time with low-probability prospects.
* To position yourself as a true professional.
* To build excitement for your meeting with the client.
* To ensure NO OPPORTUNITIES ARE LOST due to mishandling.

## Prospect Calls in AND Is Answered LIVE

### Rules

* The MUST be answered by a live person.
* The phone must not ring more than 3 times before someone picks up live.
* The person answering the phone must speak clearly and cheerfully.
* The prospect should NEVER be put into voice mail; use some type of instant messaging to see if that person is able to take a live call that has come in.
* If no one is available to pick up the call, ALWAYS BOOK THE APPOINTMENT.
* Sales manager owns this process to ensure it’s being done correctly and accurately.

### Script and Process

A prospect calls in and says something like, “Hi, I’m calling to talk to someone about…”

**The Response is ALWAYS**: “Excellent, I can help you with that!”

* First, may I get your name and the company you’re calling from? <<You notate this information>> Great Thanks <<NAME>>, are you the owner? <<If NOT the owner, get their title. Also get full contact info and email address of the decision maker or the owner>>
* And may I ask your phone number…just in case we get disconnected when I transfer your call? Thank you!
* How did you hear about us? <<If they were a referral get their name as they like to reward our referrals.>>
* How many PCs or Servers are in your office? <<If under 10 or a home user, use your discretion to continue or send them to Thomas Howard at (414) 261-5000 as he can help them with your home or small network.>>
* Now get more caller and company information:
  + Email Address
  + Phone Number and Extension
  + Full Location and mailing address

**If the Sales Rep Is Available:** “Thank you for that information! Let me transfer you over to David, who is our CEO. One Moment Please…”

**If the Sales Rep Is NOT Available**: “Thank you for the information! Can you tell me a little about what you need help with?” <<Let them explain while you take careful notes.>>

“Okay, the best option is for me to schedule David our Solutions Architect to come over to your office and look at what’s going on and talk to you in person about how we can help. David is our CEO. I can get him over there later today if that will work for you, or tomorrow morning?”

**If They Start Asking About Price or Other Questions, The Person Booking the Appointment Should Say:** “David really is the best person to answer that question, so let’s book the appointment so we get it on the calendar and then I’ll send you some information that may answer that question. I’ll also ask him to call you before coming out.”

### Book the Appointment

* Get the address for the appointment and enter is and all contact information, details of what they need help with and how they heard of us in CRM tool.
* Send an Outlook Calendar meeting request (include the Shock and Awe link if applicable). Otherwise, prep and send a physical Shock and Awe box to them.
* Notify David immediately and CC them on all email correspondence.
* David or Admin: Connect with them on LinkedIn.

“Excellent. So, I’ve got you all set to meet with <<SALES REP NAME>> and <<TIME>> on <<DAY>>. I’ll give him all this information and will send you an Outlook Calendar Invite with some pre-meeting materials that will outline who we are, how we work and answers to some frequently asked questions you might have. Is there anything else I can help you with? Okay, we’ll see you on <<DATE>>!”

## Qualification and Preparation Questions

**IF THE APPOINTMENT WASN”T QUALIFIED YET**

Call to qualify and prep: “Hi, <<NAME>>, this <<SALES PERSONS NAME>>, Director of Client Support, here at YOUR COMPANY. I’m going to be the person coming out to talk to you about <<THE PROBLEM REPORTED>> on <<DATE>>. I was prepping for our meeting and had a few quick questions. Do you have a minute?”

<<Modify the questions and script below as needed to qualify the lead>>.

**IF THE CALL CAME IN LIVE AND YOU OR A SALESPERSON ANSWERED:**

“Hi, <<NAME>>, this is <<YOUR NAME>>. How may I serve you?”

<<Let them respond and tell you what’s going on. Usually they’ll tell you what the problem is. Ask a few clarifying questions if necessary. Unless you KNOW you can’t help them or don’t want to help, don’t dismiss them just yet.>>

**QUESTIONS**

NOTE: These are some basic questions to get a feel for the situation, what they’re looking for and whether or not they’ll be a right fit. Add or subtract as you see necessary. If they’re having an immediate problem, go to the “What to Do if They Are Experiencing a Major Problem” script.

* **If They were Referred to You**, say: “So I understand you were referred to by <<NAME>>. What did <<NAME>> tell you about us?”
* “Tell me what’s going on that prompted you to call us today?”
* “Can you tell me about your network?”
* “Do you know how many servers, workstations and laptops you have?”
* “Do you know the operating systems on each?”
* “Do you recall when your server was installed or how old it is?”

<<Expand or contract these questions as needed; don’t get too deep into the weeds on this call.>>

* **“What have you done to try and resolve these problems to date?”**
* **<<If they don’t answer the question above>>:** “I’m curious…who’s been supporting your network up until now?”
* “May I ask why you are unhappy with <<that arrangement / their services>> and looking elsewhere?” <<This will give you key insights into why they’re looking; skip if they’ve already told you.>>
* **<<If they are outsourcing to another company>>:** “When you told them about these issues to resolve <THE PROBLEMS MENTIONED ABOVE>>, how did that go?”

**Now that you’ve identified some key problem areas, you want them to be anticipating your visit and be excited about what you’ll be able to find and deliver. Make this statement with GREAT confidence and a bit of excitement in your voice:**

“OKAY, great! From what you’ve told me, it sounds like we can definitely help you <<RESOLVE X, Y AND Z>> issues you are having. In fact, we solve those types of problems everyday around here.”

## Close for the Appointment

I can be out there <<TOMORROW>> at \_\_\_\_\_\_\_\_\_\_o’clock, or \_\_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_\_\_o’clock. Which works best for you? Where are you located?

“Great. One more thing…In addition to yourself, who else is involved with the decisions about your company’s network?” <<Clarify who the person they named is if they didn’t tell you: “Is <PERSON THEY MENTIONED>> the Owner?”>>

“Great. Can you please make sure that <<PERSON MENTIONED ABOVE>> is present in our meeting? I’ll definitely have some questions for <HIM>>.”

“Excellent. So, I’ll be coming out to your office at <<ADDRESS>> on <<DATE>> at <<TIME>>.

“That’s it! Do you have any questions for me prior to our meeting?”

“Excellent! I’m looking forward to seeing you at <<TIME>> on <<DATE>>!”

## Notes on Getting the Decision Maker to the Meeting

If the call was handled properly when it came in, you should already know if they are the owner or not. If they are NOT the owner or the key decision maker you’re used to working with, it’s important that you push for the key decision maker to be in the meeting. Otherwise, you’re starting from a position of weakness, and the chance of closing the sale is suppressed. This is ultimately your call to make; if you choose to require the decision maker to be there, here’s a script you can use:

“I appreciate your position on this and, from my experience in doing this and, from my experience in doing this for dozens of clients, I know that not having <<YOUR CEO>> in the meeting is going to end up being a problem, and here’s why: in my 10 years of doing this, I’ve never met a company CEO who did not want to get involved at some level in the decision about who they outsource their support to, or wouldn’t have questions, at the very least, I really need them in the meeting since they are going to have questions about us and our services that you won’t be able to answer. But more importantly, I need to have then there to ask THEM questions that are very important to the type of solutions I recommend; and without knowing what’s important to them and getting their answers to a few key questions I have, I don’t feel comfortable moving forward because I don’t believe I can provide you the best solutions for what you want. What would you like to do?”

## Prospect is Entered into CRM

The information gathered previously in the initial inbound calls must now be put into CRM tool.

* Company name and full address.
* Full name, address, email and detailed notes on the initial call are recorded. Link this contact to the correct Company.
* Add type to: “Prospect”
* Gather Social media names, input in CRM.
* Tag prospect with Newsletter and tech-tip card.
* “Source” is updated for tracking purposes.
* Shock and Awe box sent by FedEx or delivered if close. (optional)
* Connect with prospect on LinkedIn and other Social Media.

## Confirming the Appointment

**BEFORE** you leave for your appointment, have your **assistant call the prospect** to confirm the meeting by saying, “David is on his way and should be there shortly.” That way, if they’re not there, or if they were thinking about standing you up, you’ll know ahead of time and won’t have wasted a trip. This is a good time to reaffirm that all decision makers will be present and that anything else you requested in your qualification call will be available.

If they say, “Oh, we completely forgot about that!” then have your assistant say, “Oh! Well, he’s already left the office on his way. I’m not sure I’ll be able to reach him in time before he gets to your office because he turns his cell phone off while driving.” Usually that will have them say, “OK, no problem.” **Don’t offer to reschedule UNLESS** you know for certain they won’t be there—for example, if the receptionist tells you the prospect, you’re meeting with is out of town and not physically in the office.

## What to Do If They Are Experiencing A Major Problem and Need Help Fast

**“We’re down and really need someone out here today!”**

This is an area where you may need to be flexible about how you move forward. If someone has a network that is down or has a problem, they need resolved ASAP, they probably just want you to come out and fix it rather than go through the full sales process (network audit) and wait for the results.

I would STILL take them through the qualification questions outlined earlier and I would still, at some point, conduct an audit and recommend a service contract, but to get your foot in the door and not frustrate this potential new client, you may want to offer to resolve their problem first before doing an audit.

**Explain How Your Services Work (Example)**

“I’m happy to send a tech out there <<TODAY>> to do a free diagnosis. Here’s how that will work…”

* When we arrive, we’ll sit down with you for a few minutes to ask some questions to find out more about what’s going on and to answer any questions you have about us.
* At that point, my technician will present you with a signed confidentiality agreement and work agreement to get your permission to diagnose your network, outlining our rates. It will also clarify that we won’t be doing or changing anything on your network…simply looking around to see what the issue is.
* My technician will ask you to log them in to the server or workstation where the problem is to do a quick diagnosis. They will explain what they think the problem is and what the next steps for resolving it. If we can resolve it right away, we’ll provide you with a fixed-fee quote for taking care of it right then and there.
* Now, to be perfectly clear, you won’t be under any obligation to buy anything at that point, but if you DO want him to move forward, my technician can try and service it right there on the spot—of course, whether or not we can fix it right away, we’ll give you a no-hidden-fee quote on how to resolve it.
* Our fees will depend on what we find, how long it will take, whether or not we need to order parts and a number of other issues—and because there are so many variables, I simply cannot quote you for anything over the phone because I just can’t without looking at what needs to be done. But as I said, we’ll quote you a fixed-fee price up front, and you won’t be under any obligation—plus, I think you’ll find our services to be very competitive; we’re not the cheapest, but we’re certainly not the most expensive either.
* Then, once we get your problem resolved and get you back up and running, we’ll conduct a more thorough health check of your system to find out what else is going on and make recommendations on how we can prevent these issues from happening in the future.
* Would you like to schedule that right now?

# First Meeting: Discovery / Diagnose

## Purpose

To determine if there’s a mutual basis for moving ahead.

* What’s the **BHP** (Big Hairy Problem)?
* What’s the **RESULT** they want you to produce?
* Do they have the authority to make a **DECISION**?
* Can they **AFFORD** what you’re selling?
* Can you **ACTUALLY** help them?
* Is there a high probability this will end up with a **SALE**?

### Be Prepared

* Arrange your schedule so you are NOT rushed—it will show up in your face and presentation. Make sure you show up 5-10 minutes early; there’s nothing worse than being late to your very first appointment! If you are going to be late for unforeseen problems, call and let them know.
* Make sure your car is clean, inside and outside. Believe it or not, some people will view your dirty car as a negative—and people WILL look!
* Have a prepared **AGENDA** for the meeting, including what the goal of the meeting is and what you are going to ask, do or say.
* Have your materials in a NEAT, polished briefcase or portfolio, not an old beat-up bag. And make sure you don’t have papers cluttered inside; take only what you need and a spare copy.
* Dress Professionally:
  + Men wear a suit. Ensure shirt is ironed. Keep an extra shirt and tie in your car in case either are stained.
  + Shoe must be new and polished, not beat-up. No sneakers!
  + No overwhelming perfume or cologne, it’s best NOT to wear any.
  + Men: clean-shaven, clean trimmed finger nails, no earrings of any type, short hair.
  + Women: conservative dress, subtle makeup and jewelry, no cleavage, no short skirts, avoid too-tight clothing and super bright colors. Your hair should be up in a neat twist. Absolutely no chipped fingernail polish or bright nail colors; it’s better to have none.
  + No smoking or smell of smoke. If you smoke, abstain before going into a meeting.
  + Use mouthwash! If your breath is bad, they won’t hear a thing you say!
  + Make sure you do not have sweaty palms! There is NOTHING worse that shaking hands with someone who has damp hands.

### Confirm the Appointment

* BEFORE you leave for your appointment, have an assistant call the prospect to confirm the meeting. If the prospect isn’t there, or if they were thinking about standing you up, you’ll know ahead of time and won’t waste a trip. This is a good time to reaffirm that all decision makers will be present and that anything else you requested in your qualification call will be available.
* If you don’t have an assistant who can call, send an email from your “assistant” with the same message.

### Make a Positive First Impression!

* **Give yourself a pep talk in the car before you go in**. Take the pressure off by reminding yourself that you didn’t have the sale before you went in, and if you don’t get it now, you are no worse off.
* **Act Confident**, speak clearly, sit up straight and SMILE; remember, 90% of communication is NON-VERBAL.
* **Create Reciprocity**. Present the secretary and owner each with a small token gift such as a logo mug with chocolate. This is double important if the secretary or assistant is the one helping you get the second appointment, or helped you get the first one.
* **Take CAREFUL Notes**. You’ll need them later and it shows you are paying attention. Consider getting a Livescribe pen that will record your entire meeting.
* **Build Rapport**. The easiest way to match and mirror the owner’s tone, speed of speech and demeanor.
* **Start the Meeting**. Thank them and assure them that you can help.

**Sound Bite**: “Okay, so my understanding is that you’re having some problems around, FILL IN WHAT YOU LEARNED>> and have brought me in to <<Insert what they told they want; it may be as simple as saying “to help you resolve these issues.”

* + What are you hoping to get out of this meeting today?
  + Have you had a chance to look over the materials I sent over? <<**NOTE**: Never call it a shock and Awe” box. Just call it “materials” and leave it at that>>.
  + I’m going to cover a little bit about who we are and what we do—but before we get started, do you have any questions about me or my company?
* **Present your Suggested Agenda**. This will immediately put you in a position of authority and control AND set you apart from any other salesperson they’ve ever encountered. Having an agenda keeps you on track and demonstrates that you are professional, though, organized and respectful of their time.
  + **TIP**: Leave some lines on your agenda for them to take notes and encourage them to do so.
  + **When Preparing the Agenda**, say: “Here is the agenda I have prepared for our meeting to make sure I stay on track. Why don’t I run down this quickly to make sure I haven’t overlooked anything important that you would like to cover?”
  + **See Appendices for “First Meeting: Discovery / Diagnose Sample Agenda”**

### Conduct the Discovery Portion by Asking Questions

#### Segment 1: Pain Questions

Purpose: To uncover the prospect’s biggest pain points and concerns. You should already know what some of these are from the Pre-Meeting Questionnaire. If you already asked these questions (and you should have), then don’t annoy the prospect by asking them again.

Instead Say:

“I know from our initial call that <<SITUATION>> is a problem for you, as well as <<PROBLEM>>. Is that still the case or is there a new problem that has developed that need to know about?”

“Great. Can you expand a bit on <<PROBLEM 1>>?

* Why is that a problem?
* How is that affecting your business? Your staff? Your computers?
* What have you done to resolve it? How did that work out?
* What do you think the solution is?
* How urgent is it for you to get that fixed?”

“Excellent…mow what about <<PROBLEM 2>>?

* Why is that a problem?
* How is that affecting your business? Your staff? Your computers?
* What have you done to resolve it? How did that work out?
* What do you think the solution is?
* How urgent is it for you to get that fixed?”

(CONTINUE THIS UNTIL YOU’VE GONE OVER ALL THEIR CONCERNS)

#### Segment 2: Wedge Questions

**Purpose:** To further develop their dissatisfaction with their current provider and help them see areas where they are being underserved.

* When your IT person conducted the last restore of your backup—sort of a fire drill—so you knew for sure you could be back up and running fast in the event of an emergency, how did that process work?
  + If they say, “I don’t know what you mean” or “We’ve never done that”, then say “Of…so running a fire-drill test restore of your network to make sure you can be back up and running fast is something that’s not important to you then?” Use this same response to the other questions below if they have the same response.
* I curious…when your current IT provider drafted up your written disaster recovery plan so that all your employees know what to do to keep the office running in the event of an emergency, did he/she include the phone system or just how to access the network?
* And when he/she scans your office daily to make sure all antivirus, security patches, firewall and other security settings are 100% up-to-date and functioning properly, do they send that report to daily, weekly, or monthly?
* When your IT person setup your content filtering/firewall for your office to make sure your employees were NOT downloading viruses, going to website they shouldn’t be going to or doing other things that could harm your company, were you happy with the reporting they gave you on this and their Internet usages or is there something you’d like to see different?
* And when your IT person created your network documentation—basically an inventory of all your systems, hardware, software licenses, passwords and information in case of a disaster or systems restore—did they provide that to you in an electronic format, paper, or both? And do you feel confident that you can read and understand it in case you needed to find software licenses, passwords and other critical components on your network? Or is it in geek speak?
* When your current IT person drafted your AUP (Acceptable Use Policy) and trained your staff on it so they weren’t doing things online that could jeopardize your company’s confidentiality or security, were you comfortable with what they did or is this something you’d like to see different?

#### Segment 3: Do the Math

Purpose: To develop a financial case for the solution/services you are selling. Here are a few questions to ask to uncover what their ill-maintained network is costing them.

Start out by saying, “Have you ever conducted a Total Cost of Ownership (TCO) analysis before?” If yes, ask them what numbers they came up with and they calculated them.

IMPOTANT: Below are some sample questions for conducting a simple “cost” of network downtime. Keep in mind that it’s not easy (or always necessary) to provide an “ROI” number of IT services and solutions, and it’s often easier to provide a TCO analysis.

* How often does your network go down? For how long?
  + When that happens, who must deal with it?
  + What does that person cost you per hour?
* Do any of your machines run slowly? Crash? How often does that happen?
* What about problems with your phones, Internet or line of business apps; who must address those problems? How often do these problems come up?
* If your network went down for a day…Would it impact…
  + Sales?
  + Customer service?
  + How about employee productivity? Would people still be able to do their jobs or not?
  + Has this ever happened? If **YES**, can you tell me about what happened?
* What data on your network do you believe to me MOST important and MOST valuable to you? What’s next? And the third in line?
  + What are you doing to protect that data?
  + How confident are you that it’s safe?
  + Have you ever conducted a test restore?
  + If you lost data, what would be the cost to your organization?
  + What would the cost be to restore it?
* How much time do your employees spend surfing the net for personal reasons?
  + Do you have a way of monitoring what they do online?
  + Do you know how much time they spend on those activities?
  + Do you care to monitor and control this?
* What’s the average salary of your employees?  
  NOTE: You’ll use this to calculate the soft costs of all the above time they are spending on downtime, dealing with problems, span, slowness or even wasting on personal activities online.
* Example of calculating the above:
  + 52 weeks a year x 40-hour week = 2080 hours
  + Average salary: $40,000
  + Multiply by 1.3 to account for all costs of that employee: $52,000
  + Cost per hour: $25 per hour ($52,000 / 2080 hours)
  + 1 hour of downtime per week (estimate): 52 hours
  + 52 (hours) x $25 per hour = $1300
  + If 10 employees: $13,000

#### Segment 4: The 3 Questions to Uncover Any Prospect’s Buying Criteria

Purpose: To uncover the prospect’s specific buying criteria so you can hone your presentation now (and later) to address the specific things that prospect is looking for.  
  
Here are the 3 Questions to Master:

Obviously, you’re looking to make a change in who supports your network. To that end…

1. What’s most important to you when selecting a new IT firm to work with?
2. Why is that important to you?
3. How do you know when <<YOUR GETTING THAT RESULT>>?

**IMPORTANT**: Make them be very specific with their answers. If they say, “Good service,” ask them, “What does good service mean to you specifically?” Or, “How will you know if you are getting good service?” Or, “Can you give me an example of what you mean by that?”

**Make sure you get at least 3 Criteria**. In most cases, the prospect won’t give you every condition unless you ask. Most people have not really thought it through, and therefore need a bit of coaching to get them to verbalize it. After each answer, ask, “What else is important to you? What else? Anything else?” Until they run out of answers.

Then say, “Out of all these things, which one is most important?”

#### Segment 5: Uncovering Hidden Objectives and Other Criteria

Purpose: To uncover hidden objections that will kill the sale later.

Box Close: This is an excellent follow on to the above 3 questions.

“Okay, let me make sure I was doing a good job of listening to you. From what you just told me, you want X, Y and Z, right? Anything else? Good. SO, I know you have concerns that would make this a no-go even if I can promise to deliver what you want. So, tell me, what’s the first concern you have? The second? Third? Great. Any more reasons you’d veto this? No. Okay, so if we can take care of these 3 things to your satisfaction, the project is a go, right? Yes.”

#### Competition

* “What other companies or options are you considering?” This question will help uncover competitors you are up against. Competitors include in-house staff, hiring a dedicated IT manager and doing nothing.  
  + **NOTE:** You should have a file on every single competitor in your area, so you know what you are up against, what your strengths and weaknesses are against this competitor.
* If they ARE considering other options, ask, “As it stands right now, do you have any preferences as to what solution you are leaning toward? Why are you favoring one?”

#### Budget

* If they have been outsourcing to someone else, ask, “What is your arrangement with your current IT provider? Are you on a monthly contract for a set amount of money? May I see it?” If they ask why, tell them you just want to see what support and services the company was supposed to be delivering so you can validate of those things were happening. If they don’t want to give it to you, say, “No problem,” and leave it at that; it’s not a deal breaker.
* “Do you have a set budget for network upgrade and support that you have to stay within? Do you know what you spent last year?”
* If they don’t have a clue, say, “Based on my experience, a network of this size and scope is going to run between $X and $Y for regular maintenance and support. Are you prepared to spend that?”  
  + NOTE: This last question is one you might consider leaving out because it will be a deal breaker in some cases. This is your call. If you have a lot of leads, you might want to ask this up front and disqualify people who have unrealistic expectations of what IT support costs or who simply don’t have the money, so you don’t waste a lot of time.

#### Urgency to Buy Now

“What date do you need these problems solved by?” This will uncover their urgency to buy. If they have no urgency, your chances of closing the sale are low.

* Present Your Audit Consent Form (See Appendix). This should be done AFTER you’ve asked them some questions and you are ready to conduct the physical audit.
* Conduct the Audit. Remember, the purpose is NOT to do a full-blown assessment but rather to simply look for problems to build your case as to why they need our services. Use this audit checklist if you need help. Here are some suggestions and tips you may want to incorporate:  
  + Call is **“diagnostic” software, not “monitoring.”** Reassure them it won’t interfere with or harm their network.
  + Some MSP’s will install agents on the workstations in the office and use this as an opportunity to talk to employees about problems and issues going on. They’ll say, “I’m the guy/gal here to help you resolve some of the problems you’ve been experiencing with your computer. Is there anything in particular that’s been a problem for you?”
  + **Key problem areas to look for:**
    - Backups, including cloud applications as well as on premise data
    - Mobile device and laptops connected to the network and whether or not they are secured and being backed up
    - Age of machines, available space on the drives
    - State of the server room (windows, water pipes overhead, temperature)
    - Patch score (you’ll need to explain why this is important to the client)
    - Antivirus, spyware
    - Firewall and security
    - Content filtering (lack of)
    - Spam filtering (lack of)
    - Pirated software (no licenses)
    - Third-party cloud apps installed (Dropbox, for example)
    - Any problems or issues the prospect told you were areas of concern

### Set Up the Next Meeting

* **Schedule the next meeting to go over your Report of Findings**. Never leave without a confirmed appointment date and time for your next meeting, even if it’s tentative. Tell them what they are to do, what you will be doing in the interim and what they can expect from your next meeting.
* **Send A Summary E-Mail.** As soon as you get back to the office, send a summary email with a few bullets reiterating what you discussed and when the next meeting is.
* Bonus. Send an email gift of a book or a tin of cookies with a note that says, “Thank you for taking the time with me on Tuesday. I hope you enjoy these—but as good as these are, they won’t be nearly as good as what I’m going to share with you the next time we get together.”

# Second Meeting: Prescribe / Close

## Purpose

This is where you are presenting your recommendations (report of findings) to get them to sign the contract and give you a check.

* This is ALWAYS done in person or, at a minimum, via MS Teams or Zoom.
* NEVER e-mail a proposal!!
* By this point in the process, you’ve either closed it or hosed it. A mistake many people make is THIS is where they start to sell.

## Open the Meeting

* Re-establish rapport and quickly remind them of the problems, frustrations and key wants they shared with you so far.

**EXAMPLE:** “At our last meeting you shared with me that you were really frustrated by X, and that you were having problems with Y and Z. Plus, you said you wanted <<FILL IN THE BLANK>>, and that you believe this is cost you $X based on the numbers we went over. Is that all still correct?”

**KEY POINT:** This shows you were listening and will help put them back into “state.”

* Ask, “Has **ANYTHING** changed since our last meeting?” You’re looking to see if they changed their mind or made a decision that will affect your proposal.
* Review what you did: “As you know, we came in, reviewed your situation, installed our diagnostic software and ran some reports. Here’s what we found…”
* The formula for what you are doing is as follows:
  + Identify Pain Points
  + Agitate the problems and or consequences
  + Solve

## Present Your Report of Finding

Determine the medium of the presentation. Best to create a bound report for each person expected to be in the meeting and one for yourself. If you present of a tablet still have extras for notes for the prospects as well.

* **Provide Summary Page**. Most C-Level people are NOT technical, so be careful not to kill them with 10 pounds of jargon and techno-babble or you’ll risk losing them. You SHOULD have the full report to demonstrate you’ve done your homework, and, in the event, they want to see it; however, the summary page is going to be the most important. TIP: check LinkedIn and view their profile – their website
* **Highlight the BIG Problem Areas**. Go through each one and explain what it is, why it’s a concern and agitate the problem. Tell the client stories to drive home various points. NOTE: The company we use for outsourced IT coded each problem with a “bomb” icon, making it easy for us to see the problems summarized.  
  + **Talk Through the Cost and Consequences**. “Here’s what I believe these issues are COSTING your organization, or eventually WILL cost you if not resolved.” Go on to outline the costs and consequences, keeping in mind what they initially said was most important to them.
  + **Verbal Transition**. “So, I have put together some options to solve these problems and to help you…” Again, tie the end of this statement back into what they said was most important. Refer to the notes you took in your first meeting. Make sure they understand that you’re talking to THEM about THEIR problems, and this isn’t just another “canned” presentation that you give everyone. “And if my calculations are correct, I believe I can <<INSTERT a benefit you know is important to them, such as “save you $X” or “give you the flexibility you want in how employees access your network.”>>

**SOUND BITE**: “Would you like me to go over those with you now or do you have any questions about what I just showed you?”

## Present the Solution

* **Explain your options at a high level**. I recommend having at least two options so you can deliver the “alternate choice” close. Don’t have more than three. Further, you might have three prepared, but only offer the cheapest “bare-bones” plan they just won’t budge on the other two.

**SOUND BITE**:

“There are a couple of possibilities to consider…Actually, three.”

“We find that some business owners we met with have a super-tight budget, but usually these are start-ups or companies that are struggling a bit. They may have never used this type of service before and are not even sure they need it, so they’re looking for the bare-bones service that will get them by. And that’s fine. We can provide an economical services plan and work within most budgets.”

“Then there are those business owners who really depend on their companies to keep their business running. They recognize the need to keep everything in good working order and prevent an eventual breakdown or disaster. That’s our middle group of clients, and that’s the category most business your size falls into. I don’t know your financial situation, but my guess is that this is where you are.”

“Finally, there are those business owners who don’t want to chance anything and simply want us to take care EVERYTHING for them. Their computers are their lifeline, and without them being in top condition and working flawlessly, they’d be dead. They want a technician to be on the phone or at their site correcting the situation as quickly as possible. This is our ‘911 Emergency Service Plan.’ For clients on this plan, we pull out all the stops and give our best ‘Red Carpet’ service. Plus, we take complete ownership of their network, so they never have to worry about any aspect—it’s all included. <<OPTION:>> Also included in this plan is where we take care of all the hardware and software as well…”

**TRIAL CLOSE:** This is NOT asking for the order yet but getting a rough idea of where they are. “Now, I’m not sure where you fit or where you see your business heading. Which one of these plans are you leaning toward?”

**NOTE:** Based on the response, you might be able to simply close the deal. If they say, “I think we’d like to go with Option 1,” then just assume the sale: “Great! All I need you to do is okay the paperwork and I can get my crew out here by the end of the week to start resolving these issues.”

* If they are unsure, or say they’re thinking maybe Option 2 but also like Option 3, then direct them: “Okay, here’s what I would like to recommend for you, and why…”
  + Tie your recommendation back to what they said was MOST important to them. “The reason I think Option 2 I best for you

# Appendices

## First Meeting: Discovery / Diagnose Sample Agenda

* **Purpose of Our Meeting.** Please use the sample sound bite for you to use to explain this part to the prospect. On the printed agenda, you want to have a short summary of the following items listed below.

### First Meeting: Sound Bite Discussion Points

*“The purpose of this meeting and the Network Health Check is to analyze your computer network to look for the root causes of some of the problems you outlined to me, as well as to look for hidden problems brewing in the background that could turn into bigger problems, such as hacker attacks, lost data, slow performance, system crashes and other issues that could lead to extensive downtime and data loss. It is also your opportunity to ask me anything you want about my business or myself, or to get my opinion on any upcoming projects you may want our help with. The reason for doing this is to provide you with a Recommended Action Plan that will alleviate these problems and help your business be far more profitable and productive; after all, I think you’ll agree that your time and your staff’s time is far too valuable to waste on technical issues, especially when they are completely unnecessary, RIGHT?”*

(PAUSE AND LET THEM RESPOND)

*“I also want to point out that I am not going to try to ‘sell’ you anything today because I’m not even sure if I can help you. At the end of this Network Health Check, I will be able to determine whether you need our help in securing and maintaining your network, and I can provide you a Recommended Action Plan to remedy any problems I may discover. At that point, you will determine if you are comfortable with our approach and we can move forward. But if you are not, you don’t owe us anything. Before I explain how the Network Health Check works; do you have any questions?”*

(PAUSE AND LET THEM RESPOND)

*“****This Network Health Check is going to be conducted in 2 parts****. The first part is a series of questions I’d like to ask you so I can understand what problems and concerns you have about your network, how your business operates, the systems and processes you have in place, and how your employees use your network. Ultimately, my goal here is to uncover ways we might help you run your business faster and more efficiently, and to help me understand what your priorities are when it comes to the technology you use to run your business.*

***The second part*** *is where I’m going to conduct a thorough check of various security and performance components on your network to look for problems that may not be apparent to you but could be causing slow performance and leaving your data and network exposed to a number of threats.*

*To do this, we will need access to your servers to include the active directory and exchange servers. For example, we’ll install special DIAGNOSTIC software that will conduct a performance and security check and provide and instant report for you to look at. This software will not slow down your network, won’t install spyware or other intrusive programs on your server, or cause any types of problems whatsoever. In fact, I have a confidentiality agreement we need to sign and give you to put your mind at ease that we are not going to any harm.”*

(PAUSE AND LET THEM RESPOND)

*“Once these 2 parts are done, I’ll want to meet with you a second time within the next 2-3 days to go over what I discovered and present our Report of Findings and a Recommended Action Plan to remedy any performance and security problems I discover during the Network Health Check. Before I get started, do you have any specific questions or concerns?”*

### An Introduction to YOUR COMPANY

Take 5 minutes to go over who you are and what you’re about. Tell them your origin story, your mission and what you are passionate about. Detail your value proposition and/or USP. You shouldn’t take more than 5 minutes to do this. Make sure you talk about your values, your mission statement, who you work with and why you do what you do.

### Review of Situation

Reiterate the problems and the situation you learned from the Pre-Meeting Questionnaire call. You might want to outline what they said in bullet points. This shows them you were paying attention. Simply take a few minutes to say, “As I understand it, you are having problems here, here and here, you are looking for <<RESULTS>>, you currently have <<JOE>> supporting your network and you’re NOT happy because <<WHAT THEY TOLD YOU>>. Is all that still true or has anything changed? Have I missed anything?”

### Discovery

This is where you will ask questions to uncover pain points and buying criteria. Make sure you use well-thought-out-in-advance and carefully structured wedges. Ask if you have their permission to take notes so you can capture the points that are of concern or importance to them. Then MAKE SURE you DO take note. Don’t just ask then not do it, because you’ll look like you’re not paying attention. Consider having a pre-designed note taking pad with defined categories and a few questions listed under each.

### Technical Audit

This is where you will do the actual work of conducting your audit. You will install the agent on the servers, run them and copy collected data back to thumb drive then uninstall the agents.

### Schedule Meeting for Report of Findings

Make sure you schedule this before you leave. Ideally you want to come back within 3 to 7 days—don’t let this drag out!

## Audit Consent Form Example

**Information Technology Audit Consent Agreement**

YOUR COMPANY, LLC, with corporate headquarters located at XXX ADDRESS (“COMPANY”), and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, with corporate headquarters at\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(“CLIENT”), do hereby agree as follows:

1. **IT AUDIT SERVICES**  
   COMPANY will perform a comprehensive network audit of CLIENT’s IT infrastructure and systems to properly diagnose and prepare a recommended action plan for resolving known and underlying problems in CLINET’s computer network.
2. **DESCRIPTION OF SERVICES**
   1. COMPANY will install diagnostic software on CLIENT’s server and personal computers. The software will be completely removed after the audit is completed and will not have any negative effect on CLIENT’s network data, security or performance.
   2. COMPANY may take photographs to document existing conditions.
   3. COMPANY will not perform any remedial actions as a result of this process. Any critical issues uncovered by COMPANY will be clearly communicated to CLIENT during the audit process, or at a subsequent meeting.
   4. During the audit process, COMPANY will not access any computer systems or associated data, unless specifically requested to do so by CLIENT.
   5. COMPANY will keep all information, data, passwords, and other information collected during this process confidential and will not use or distribute any information uncovered for any purpose other than to provide CLIENT with a detailed Report of Findings.
3. **COST**There is no coast or obligation to CLIENT for this service
4. **LIMITATION OF LIABILITY**In no event shall COMPANY be liable to CLIENT, any employee, agent or seller of CLIENT, or any third party associated with CLIENT, for the loss of profits, loss of business or indirect, incidental, special, consequential, exemplary or punitive damages arising out of or related to this agreement, even if COMPANY has been advised of the possibility thereof. COMPANY’s liability to CLIENT hereunder shall in no event exceed the total amount paid by CLIENT to COMPANY for services.

EXECUTED ON \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

YOUR COMPANY, LLC

BY:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CLIENT:  
BY: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_