



SALESQUALIA

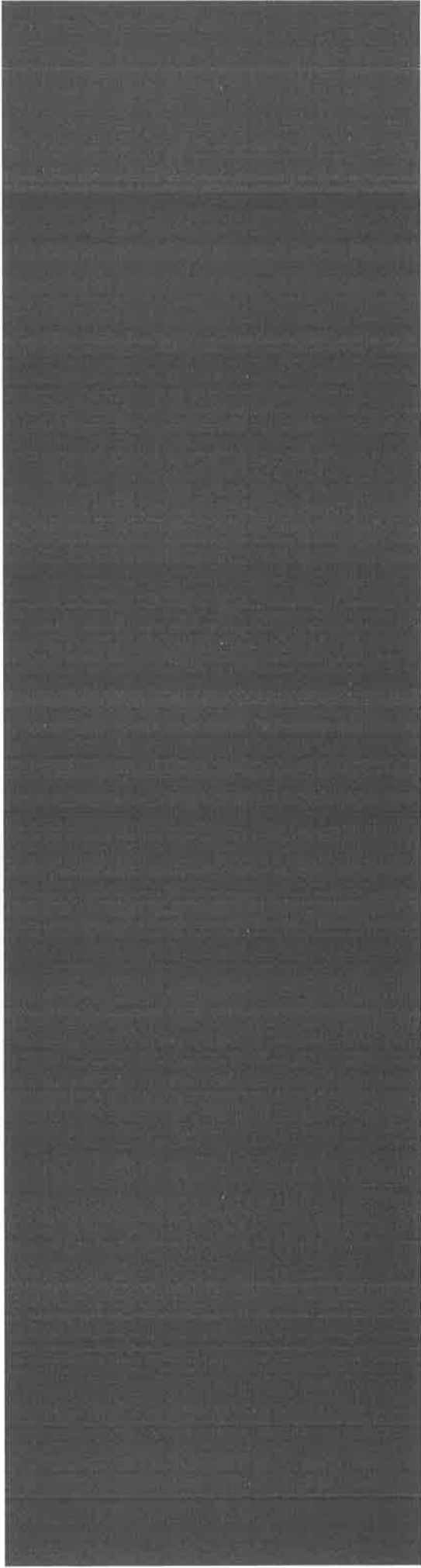
**The Startup Selling  
Client Intensive:  
Fall 2018**

Name: \_\_\_\_\_

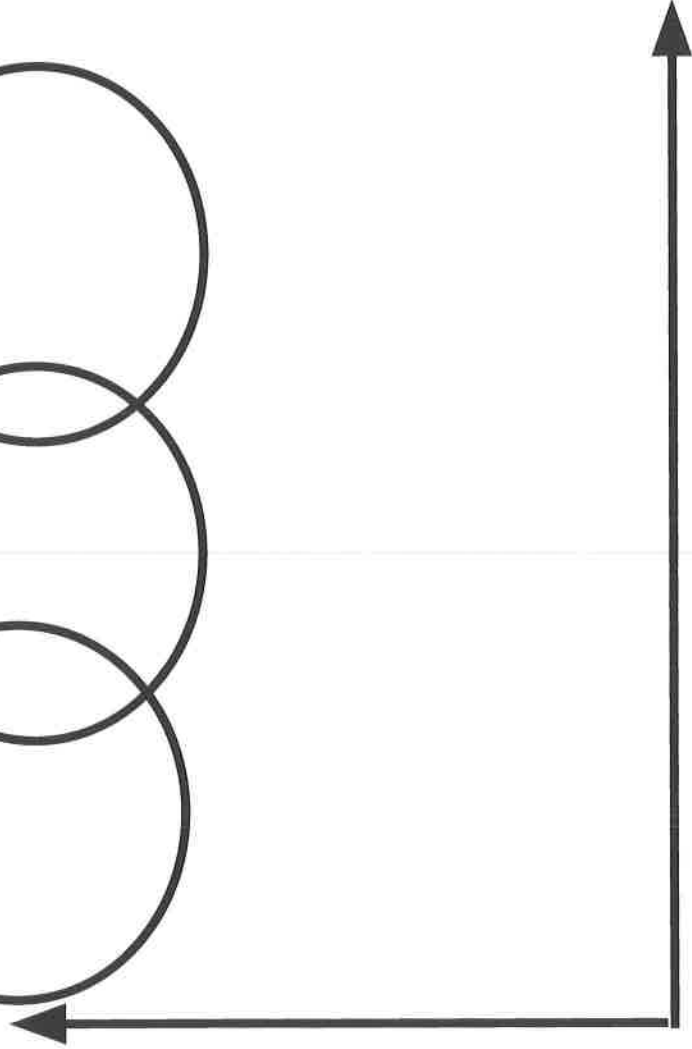
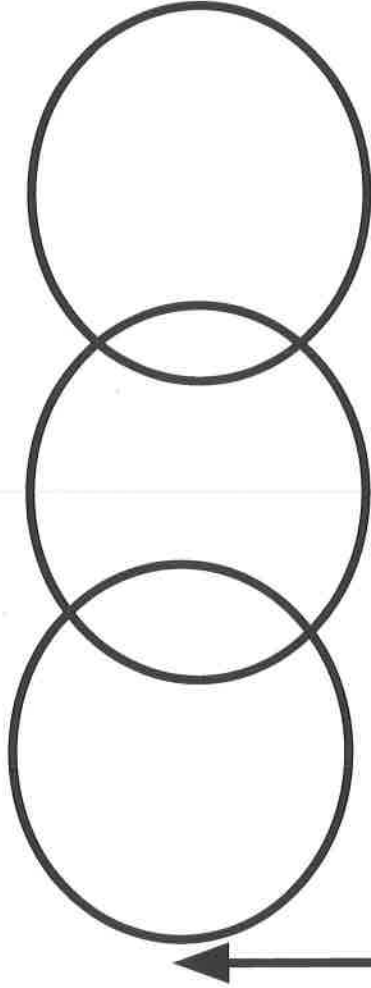
| <b>DAY 1</b>                    | <b>Insight &amp; Action #1</b> | <b>Insight &amp; Action #2</b> | <b>Insight &amp; Action #3</b> |
|---------------------------------|--------------------------------|--------------------------------|--------------------------------|
| <b>Let's Do This!</b>           |                                |                                |                                |
| <b>The Objections Overhaul™</b> |                                |                                |                                |
| <b>Pricing Strategies</b>       |                                |                                |                                |
| <b>The Mastermind Session</b>   |                                |                                |                                |

| <b>DAY 2</b>                      | <b>Insight &amp; Action #1</b> | <b>Insight &amp; Action #2</b> | <b>Insight &amp; Action #3</b> |
|-----------------------------------|--------------------------------|--------------------------------|--------------------------------|
| <b>ToolKit Session</b>            |                                |                                |                                |
| <b>Buyer Personas</b>             |                                |                                |                                |
| <b>Predictable Prospecting™</b>   |                                |                                |                                |
| <b>100-Day Plan &amp; Wrap-Up</b> |                                |                                |                                |

**Let's Do This!**



# From Idea to Impact™



# The Momentum Builder Worksheet



Past: What are you most proud of?

Present: What are you most confident about?

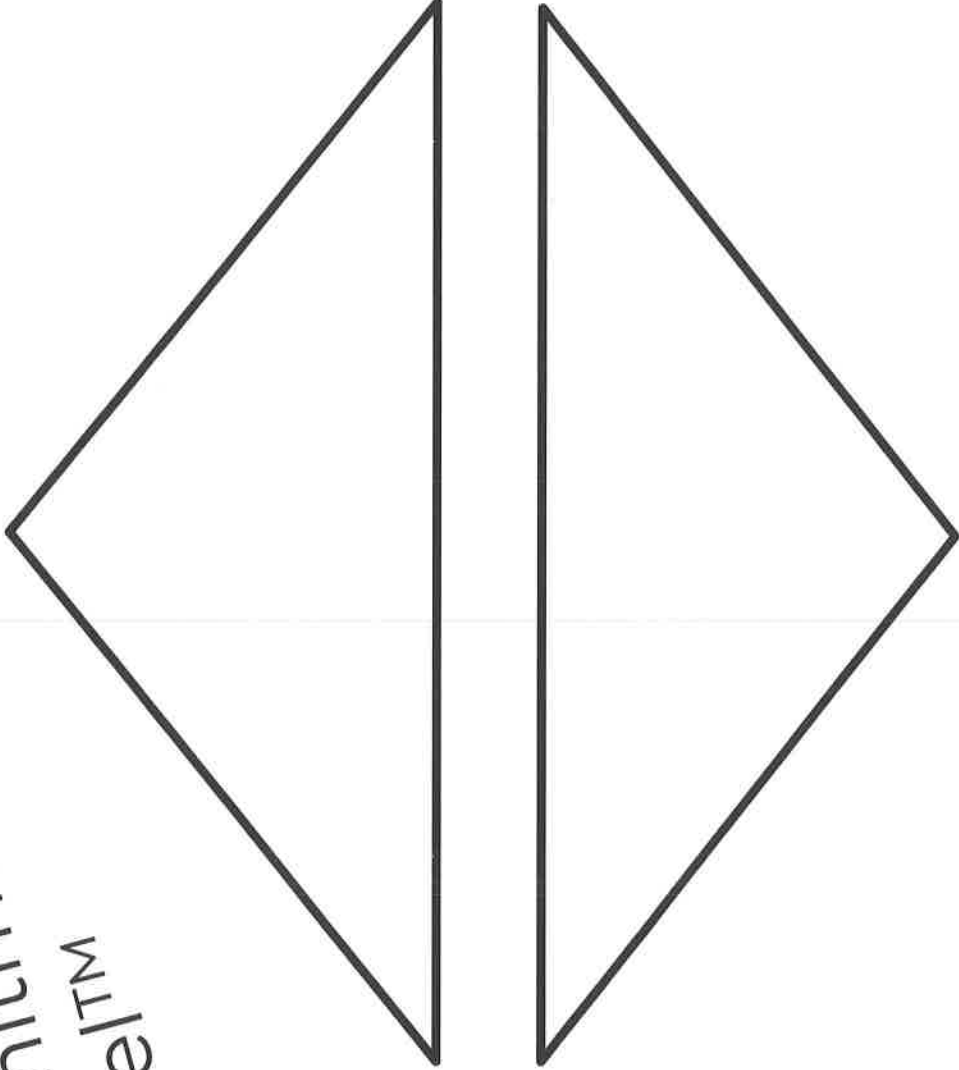
Future: What are you most excited about?

# The Momentum Builder Worksheet

Results: What are 5 results you want to create in the next 100 days?

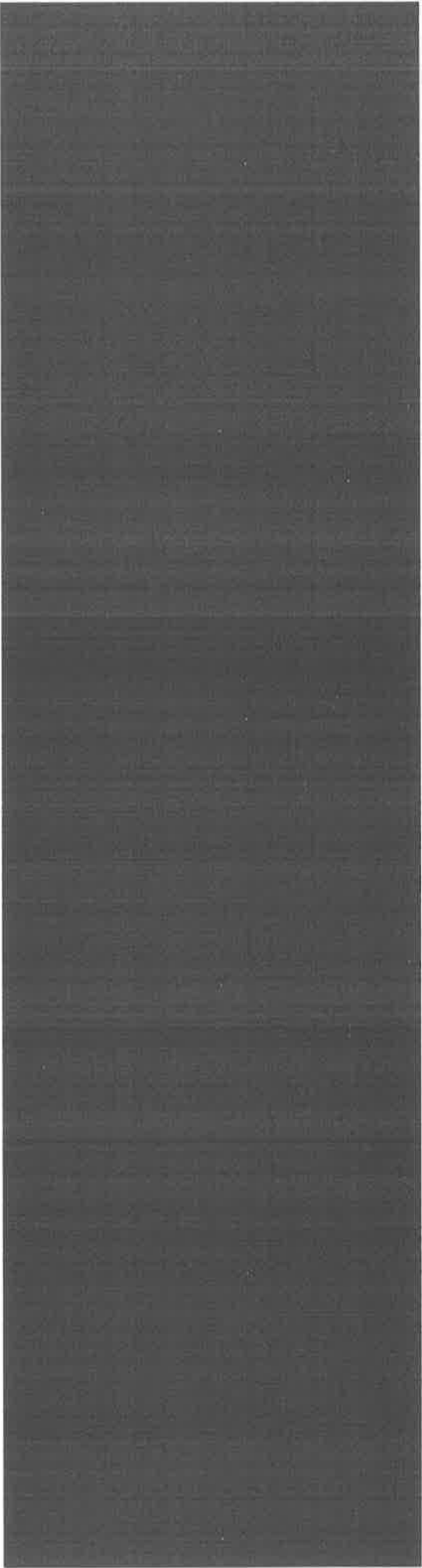


# The Commitment Model™





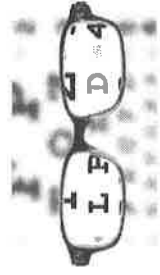
# **The Objection Overhauler™**



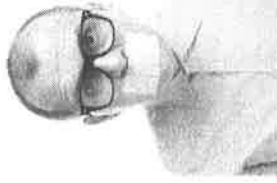
# The Objection Overhauler™



## 2. Get Clarity



## 1. Shut up the F%ck Up



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"Tell me more about that"  
"How do you mean?"  
"Why do you ask?"  
"Is there any particular reason you're asking?"




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"Why is that important to you?"  
"How important is that to you?"  
"Is there anything else I should know?"  
"What other questions might you have?"

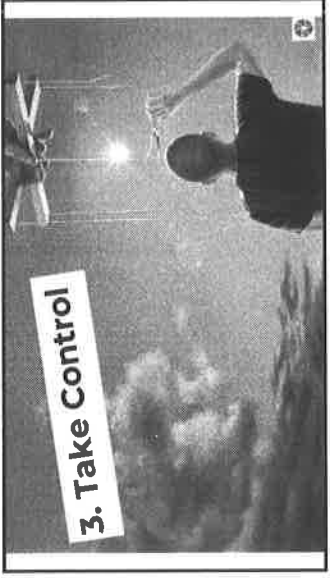


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**3. Take Control**

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“What if we...”

“I have an idea. If you’re up for it, we could...”

“How would we find that out?”

“One thing we could do is...”

“When we’ve seen this in the past we’ve...”



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**4. Build Confidence**

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Feel-Felt-Found

“You’re really going to like...”

“This is going to be great because...”



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## 5. Trial Close



"If we could... would that be more in line with your expectations?"

"Does this look like the type of solution you had in mind?"

"Where do you feel like we stand?"

"What haven't we covered that's important?"

"Where do you want to take things from here?"

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# From No to Know to Go™



# From No to Know to Go™

|             |              |
|-------------|--------------|
| They say... | They mean... |
|-------------|--------------|

|             |              |                  |
|-------------|--------------|------------------|
| Get clarity | Take control | Build Confidence |
|-------------|--------------|------------------|

|             |
|-------------|
| Trial Close |
|-------------|

|             |              |
|-------------|--------------|
| They say... | They mean... |
|-------------|--------------|

|             |              |                  |
|-------------|--------------|------------------|
| Get clarity | Take control | Build Confidence |
|-------------|--------------|------------------|

|             |
|-------------|
| Trial Close |
|-------------|



# From No to Know to Go™

|             |              |
|-------------|--------------|
| They say... | They mean... |
|-------------|--------------|

|             |              |
|-------------|--------------|
| They say... | They mean... |
|-------------|--------------|

|             |              |                  |
|-------------|--------------|------------------|
| Get clarity | Take control | Build Confidence |
|-------------|--------------|------------------|

|             |              |                  |
|-------------|--------------|------------------|
| Get clarity | Take control | Build Confidence |
|-------------|--------------|------------------|

|             |
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| Trial Close |
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|             |
|-------------|
| Trial Close |
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# From No to Know to Go™

|             |              |
|-------------|--------------|
| They say... | They mean... |
|-------------|--------------|

|             |              |                  |
|-------------|--------------|------------------|
| Get clarity | Take control | Build Confidence |
|-------------|--------------|------------------|

|             |
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| Trial Close |
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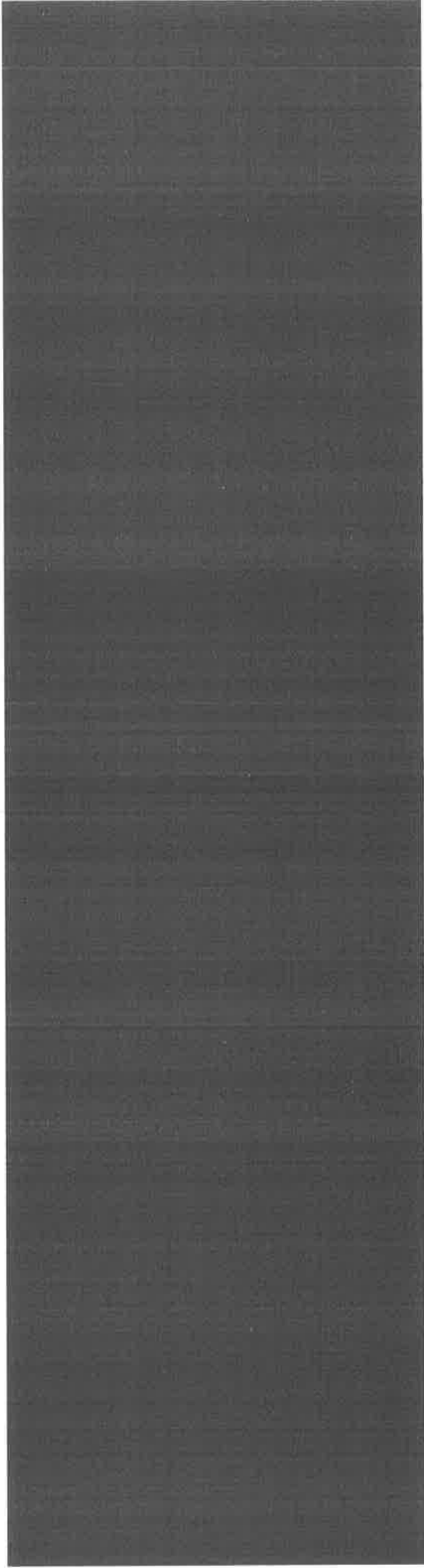
|             |              |
|-------------|--------------|
| They say... | They mean... |
|-------------|--------------|

|             |              |                  |
|-------------|--------------|------------------|
| Get clarity | Take control | Build Confidence |
|-------------|--------------|------------------|

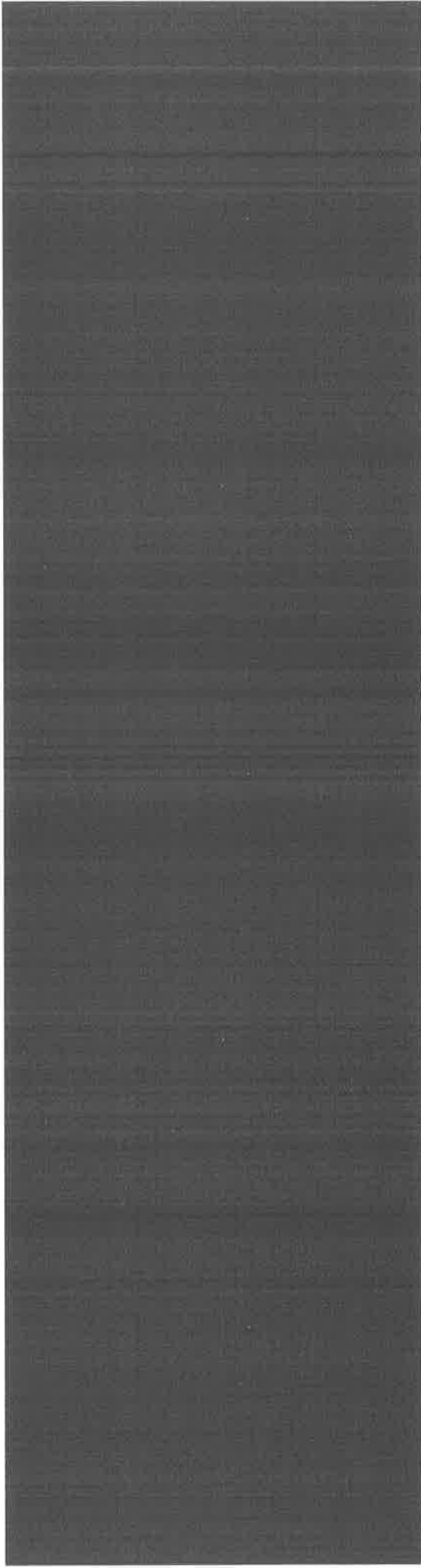
|             |
|-------------|
| Trial Close |
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# **Pricing - Patrick Campbell**



# **The Mastermind Session**



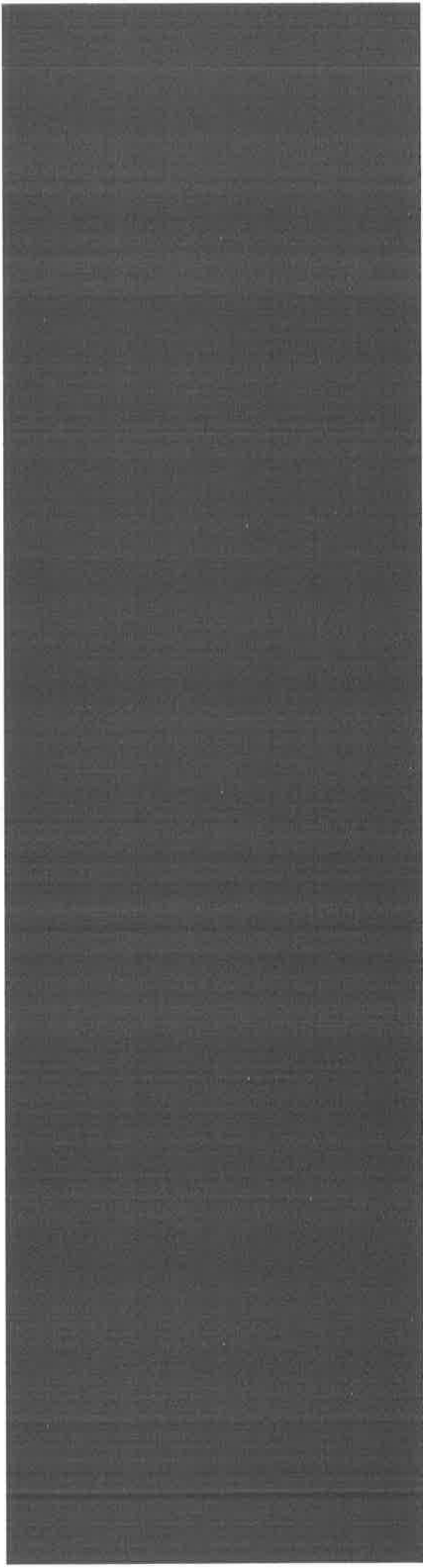
# The Mastermind Session

|  |                            |
|--|----------------------------|
| The one thing that's holding me back is... | My specific question is... |
|--|----------------------------|

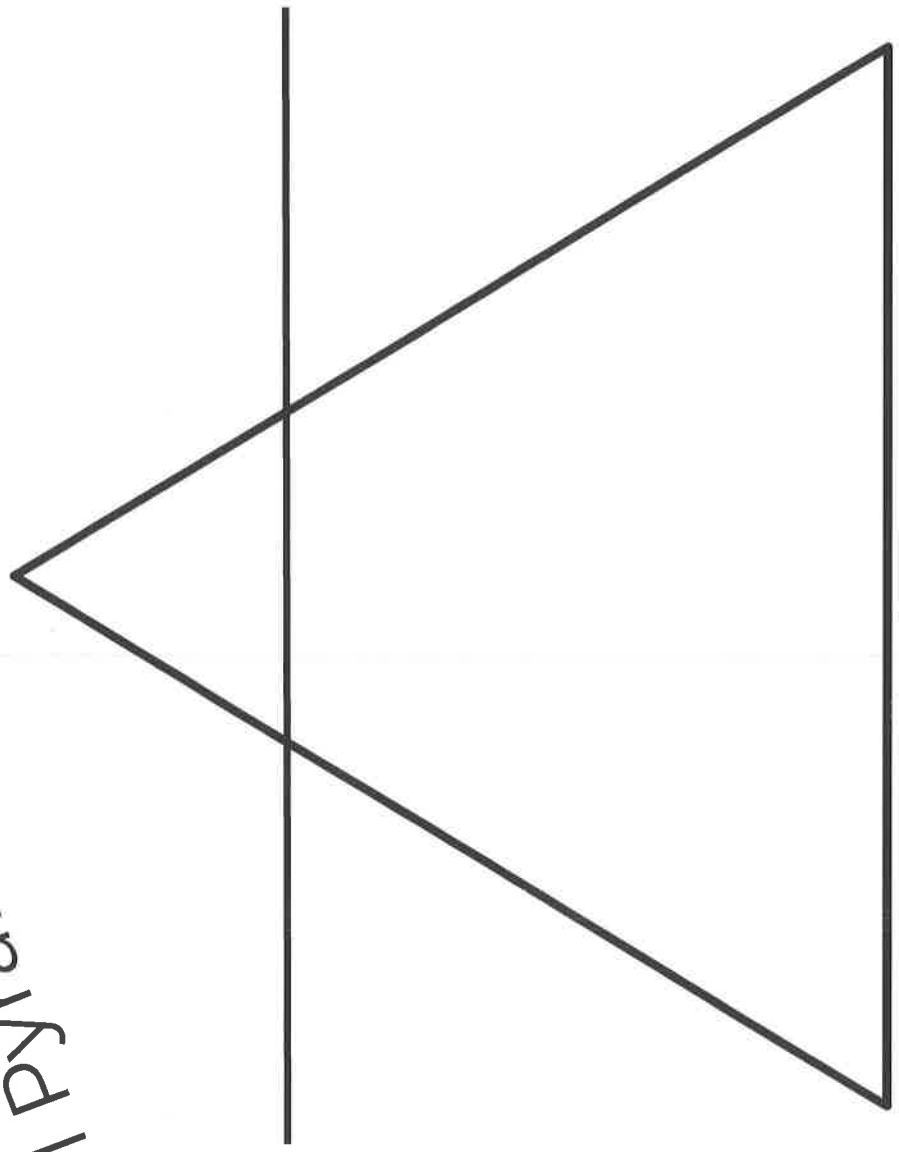
Notes:

|             |           |           |           |
|-------------|-----------|-----------|-----------|
| Key Insight | Action #1 | Action #2 | Action #3 |
|-------------|-----------|-----------|-----------|

**Toolkit:  
The Pre-Call Plan™**



# The Parallel Pyramidism



# THE STARTUP SELLING PROSPECT RESEARCHER

Company Name:

|                                     | Prospect #1 | Prospect #2 | Prospect #3 |
|-------------------------------------|-------------|-------------|-------------|
| LinkedIn                            |             |             |             |
| Conference, Speaking & Publications |             |             |             |
| Google News & PR                    |             |             |             |
| Annual Reports                      |             |             |             |
| Others-----                         |             |             |             |
| Key Challenge                       |             |             |             |
| Our Capabilities                    |             |             |             |

# The Pre-Call Strategy™

## Pre-Call Request Email #1 Script

**SUBJECT:** question re: meeting next week w/ Mary & John

**BODY:**

Hey [NAME] – Had a quick question for you... (two actually ...)

Saw that you'll be joining Mary, John and the rest of the team at our meeting next week on [INSERT DATE/TIME].

I want to make sure that we're both getting the most from the time we have together next week. So... mind if we take 5–10 minutes before the meeting next week?

I wanted to find out two things from you...

1 – What's the #1 question you'd like to have answered during our time together next week?

2 – What's your perspective on getting to [INSERT DESIRED OUTCOME]?

Feel free either to hit 'REPLY' with your quick thoughts, or I can give you a call – just LMK a couple of times that look good this week.

Good by you?

-Scott

p.s. I know you're busy, so no worries if you're not able to reply right away – I'll plan to give you a quick call later this week to catch up if I don't hear back.



## Pre-Call Request Email #2 Script

**SUBJECT:** RE: question re: meeting next week w/ Mary & John

**BODY:**

Hi [NAME] – Just a friendly follow up on my note below.

Would you happen to have 4-5 minutes this week for a quick call ahead of next week's meeting?

I want to make sure that I know what you'd like to cover in the time together.

Okay to give you a buzz on Friday or early next week?

Many thanks,  
-Scott

## Pre-Call Request Email Post-Voicemail Script

**SUBJECT:** Per my voicemail: RE: question re: meeting next week w/ Mary & John

**BODY:**

Hi [NAME] – Per my voicemail, I was calling to ask you a couple of quick questions to help us get the most from our time together at next week's meeting with Mary, John and Phil.

Would you happen to have 4-5 minutes this week for a quick call?

Okay to give you a buzz on Friday or early next week? Just reply back with a few times, and we'll make it work.

Many thanks!

-Scott

## Pre-Call Phone Script: Scheduled Call

Hi [PROSPECT'S NAME]. This is [YOUR NAME] at [YOUR COMPANY].

Had us down for a quick chat right now.

Still good for you?

Great. We'll keep it to about 5 minutes like I promised in my email. I know you've got a lot happening there, and I've got another call at [QUARTER PAST/HALF PAST/QUARTER 'TIL] so I'll be sure to keep this short for us both.

As I mentioned in the email, I want to make sure that we both get the most we can from next week's meeting, and to make sure that I'm covering the right ground with you and the team, I wanted to ask you two quick questions that will help me focus prep on my side and learn a little about your perspective on [INSERT PROBLEM] there at [INSERT COMPANY]...

Would that be okay?

Great.

First question...

What's the #1 question you'd like to have answered during our time together next week?

[LISTEN]

Great. Thanks. Super helpful. We'll definitely cover that next week.

So my second question before I let you go...

What's your perspective on getting to [INSERT DESIRED OUTCOME]?

[LISTEN]

Perfect. This is really helpful. I'm organizing our notes this week so I'll be sure to add to the meeting agenda as a target outcome for the meeting next week.

You're going to be really excited for what we'll share with you. We've got several customers that found themselves in a similar situation

So that's it from me. Is there anything that you wanted to share going into next week?

Awesome. That's it for now. Really looking forward to meeting in person.

I'll send out a confirmation email to everyone the day before just to make sure we're all good to go.

Talk then!

## Phone Script - Unscheduled Call

Hi PROSPECT'S NAME. This is YOUR NAME at YOUR COMPANY.

I've been working with Mary Jones at your company. She set up a meeting next week for us, and from the meeting invite, it looks like you'll be joining.

Is that right?

Great. I sent over a quick email a couple days back, and the reason for my call is that I want to make sure that we both get the most we can from next week.

Would you happen to have 4-5 minutes right now for two quick questions that will help us focus prep on my side, and learn a little about your perspective on [INSERT PROBLEM] there at [INSERT COMPANY]...

Would that be okay?

Great.

First question...

What's the #1 question you'd like to have answered during our time together next week?

[LISTEN]

Great. Thanks. Super helpful. We'll definitely cover that next week.

So my second question before I let you go...

What's your perspective on getting to [INSERT DESIRED OUTCOME]?

[LISTEN]

Perfect. This is really helpful. I'm organizing our notes this week so I'll be sure to add to the meeting agenda as a target outcome for the meeting next week.

You're going to be really excited for what we'll share with you. We've got several customers that found themselves in a similar situation

So that's it from me. Is there anything that you wanted to share going into next week?

Awesome. That's it for now. Really looking forward to meeting in person.

I'll send out a confirmation email to everyone the day before just to make sure we're all good to go.

Talk then!

## Phone Script: Unscheduled Call: “Now’s not a good time...”

Hi [PROSPECT'S NAME]. This is [YOUR NAME] at [YOUR COMPANY].

I've been working with Mary Jones at your company. She set up a meeting next week for us, and from the meeting invite, it looks like you'll be joining.

Is that right?

Great. I sent over a quick email a couple days back, and the reason for my call is that I want to make sure that we both get the most we can from next week.

Would you happen to have 4-5 minutes right now for two quick questions that will help us focus prep on my side, and learn a little about your perspective on [INSERT PROBLEM] there at [INSERT COMPANY]...

Would that be okay?

**THEM: “Now’s not a good time...”**

Gotcha. Could we take a second to schedule a couple minutes for the next day or so, or if you're in a hurry, I can send an email to coordinate there.

Which is better?

Okay great...

## Pre-Call Phone Script: Voicemail

Hi [PROSPECT'S NAME]. This is [YOUR NAME] at [YOUR COMPANY]. My phone number is: XXX-XXX-XXXX.

We're meeting next week with Mary, John and Phil about [INSERT PROBLEM]. I wanted to make sure that I was ready for any specific questions you want us to address when we meet, so I had two quick questions I thought would be good to know.

I'll send you a short email. If you have just a couple of minutes, feel free to reply back to the email or we can schedule a super quick call this week.

Again, this is [YOUR NAME] at [YOUR COMPANY]. My phone number is: XXX-XXX-XXXX, and I'll send over that email right away.

Talk soon.



## Common Prospect Questions & Example Responses

**“Tell me more about your product and how it works.”**

Sure, happy to share a bit now, and we'll dive into all the details when we get together next week.

We help [INSERT COMPANY TYPE] solve [XYZ PROBLEM.] Our product is called [INSERT PRODUCT NAME], and it's a software product that's designed to [INSERT VALUE PROPOSITION.]

Our main focus is working with companies in the [ABC MARKET] because [INSERT SHORT ORIGIN STORY].

Our customers tell us that the thing they like the most about what we do is [INSERT FEATURE + OUTCOME].

**“Can I get a login?”**

We configure each instance for each client, so if we decide after next week's meeting that it makes sense to set one up for you guys, we can definitely share.

Does that sound good?

**“Do you have a link or a one-pager that I can look at before the meeting?”**

Definitely. The single best place to go is our website... Once you get to the home page, click on [INSERT BUTTON LINK NAME] and you can [INSERT ACTION i.e. “download our white paper on XYZ Topic].

Also, if you've the time, I can send you a {INSERT VIDEO/LINK/TRAINING}. If you watch that, it'll give you a ton of insight as to how we think about the [XYZ PROBLEM] at companies like yours.

If I send that over, do you think you'd be able to take a look before we get together?

**“I’m not sure I’m going to make the meeting. Will it be recorded?”**

We’ll plan on it, but like everything tech-based, it can be a crap shoot from time to time. If you end up missing the meeting, you and I can book in a call and I can give you a personal demo.

How’s that sound?

**“Who are you?”**

Sure thing!

This is [YOUR NAME] at [YOUR COMPANY]. Mary Jones organized a meeting because she wanted she thought it’d be good for her and the team to take a look at how we solve [XYZ PROBLEM] at companies like yours.

**“How are you different from ...”?**

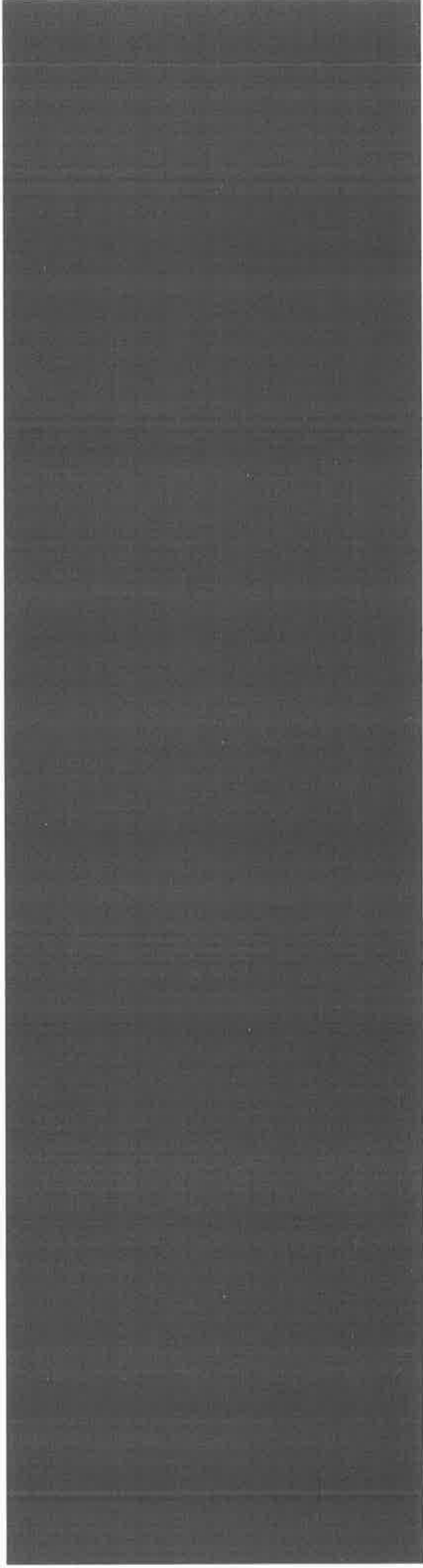
Good question. Not 100% but I’ll check them out and we can add that to the meeting agenda.

Have you used them before?

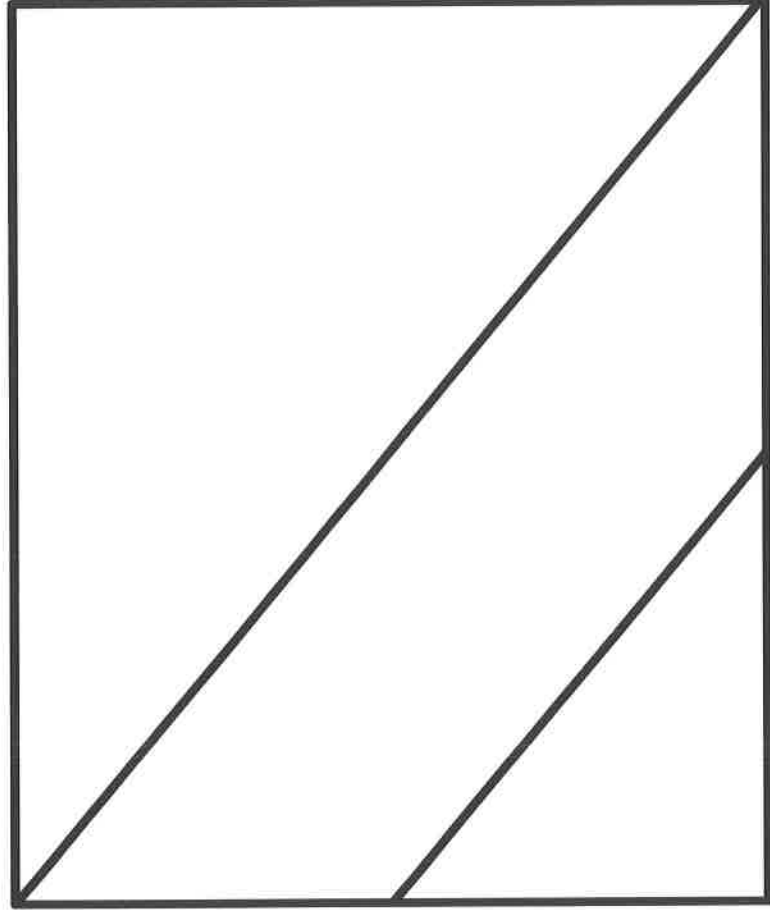
**“I’m not sure why Mary set up this meeting. We already have a solution for that.”**

She and I talked a bit about this, and it sounded like, at least on the surface, that there might be a way for us to improve on the current system. For both of us, that’s exactly why we want to spend a few minutes together – to see if that’s the case or not.

**Toolkit:**  
**confirm-Ask-Explore™**



# Confirm-Ask-Explore™



# The Confirm-Ask-Explore™ Script

## Introduction

Hey Everyone - Really glad we're able to work together today.

**Before we get started, I want to tell you —**

You're going to be really excited for what we have to share with you, and frankly we're excited too because solving the business problems that you've shared is exactly the reason why we started the company.

We've only got 60 minutes today, and so I've found that the best way for us to get the most from the time that we have is to think about the conversation in three parts —

## Confirm...

**First, let's spend 5 minutes or so** recapping where we are with our conversation so far to confirm that we're all on the same page.

I had a chance to talk with Mary, Bill and Phil this week for their perspective on where you are right now, and where you need to be in the next 6 months and I've summarized those for us to review together.

## Ask...

**Next, we'll take about 20-30 minutes** going through the product and answering questions that you have, and we've got a few questions for you just to clarify what we've learned so far.

## Explore & Future Pacing...

**That will leave us a good 20 minutes** to explore next steps and where to take things from here.

As an example, a lot of folks are keen to see what a pilot program might look like, so we can schedule a meeting to build out a work plan that would make sense for both of us.

And we might also want to have a technical conversation with your IT team about the systems you're using here and any integrations that might be important.

We can obviously go this way or that way with the conversation – this is just a loose framework that seems to work pretty well.

Sound good?

Great!

## Getting Started

**So let's get started.** I've organized my notes from our previous conversation into a "Situation Slide" as a way to recap what I learned so far.

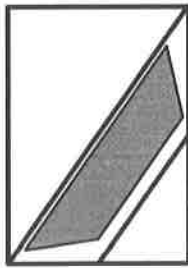
Let's review it, and of course, make any changes or updates if we've missed anything important...



# Confirm-Ask-Explore™



**First, let's spend 5 minutes or so recapping where we are with our conversation so far to confirm that we're all on the same page.**



# Confirm-Ask-Explore™



**Next, we'll take about 20-30 minutes** going through the product and answering questions that you have, and we've got a few questions for you just to clarify what we've learned so far.



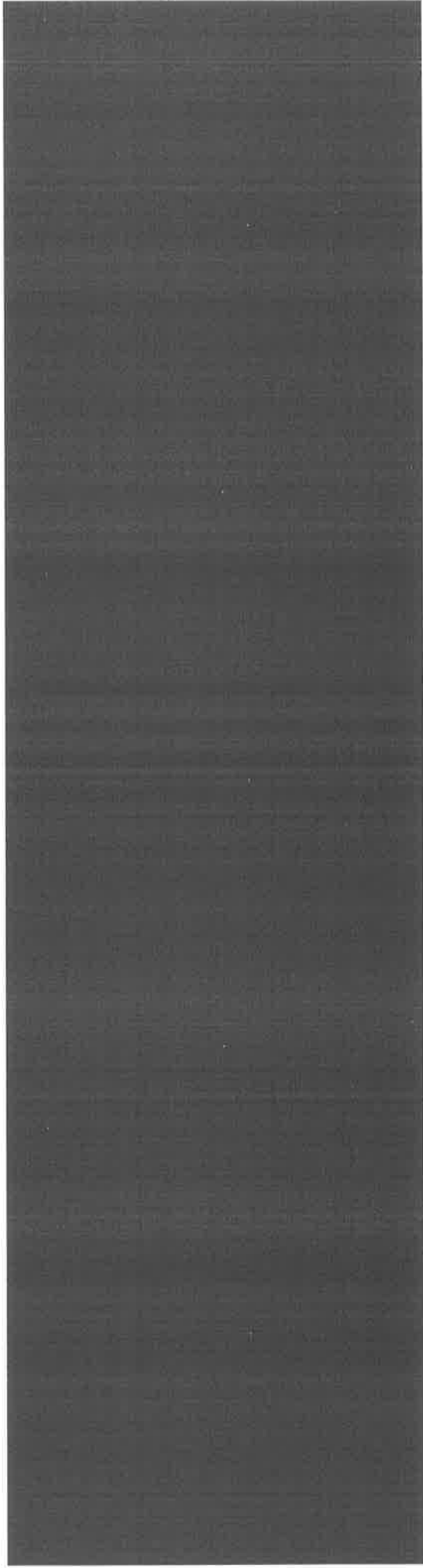


# Confirm-Ask-Explore™



**That will leave us a good 20 minutes to explore next steps and where to take things from here.**

**Building Buyer Personas with  
Jen Spencer**



# [Persona Name]

## Job, Education, Lifestyle

- What is the person's company?
- What is their role in the company?
- Any other background information that makes sense to include (education, hobbies, etc)

## General Demographics

- Age range
- Most common gender
- Typical salary
- Type of living space (city, suburban, rural)

## Identifiers

- Industry terms they respond to
- Personality traits (Type A, relaxed, anxious, etc)

# Name:

## Job, Education, Lifestyle

- 
- 
- 

## General Demographics

- 
- 
- 
- 

## Identifiers

- 
- 

**TIP** Try sending out online surveys to get this information from your current audience.

# [Persona Name]

## Name:

### Goals

- What is their primary goal?
- What is their secondary goal?
- Personal goals? Company goals?

### Goals

- 
- 
- 

### Common Pain Points

- What is the biggest pain point?
- What is the secondary pain point?

### Common Pain Points

- 
- 

### Your Solution

- How does your product or service help your persona achieve their goals?
- How does your product or service help overcome the common pain points

### Your Solution

- 
-

# [Persona Name]

## Name:

### Actual Quotes

- Record your interviews and take note of interesting or important quotes from your personas

### Actual Quotes

- 

### Typical Objections

- What do your personas typically object to about your product or service? Filling this in will help your sales team tremendously.

### Typical Objections

- 

**TIP** This information is best gathered through interviews rather than surveys and will help your sales team be more prepared before calls.

# [Persona Name]

# Name:

## Company Messaging

- This is how marketing will promote your company's product or service going forward persona by persona

## Company Messaging

- 

## Elevator Pitch

- How has your company pitch changed after your interviews? Write that here to help your sales team re sooner and quicker.

## Elevator Pitch

- 

**TIP** Use this slide to ensure alignment on messaging across teams.

# SmartBug.

[Client Name] Editorial Calendar & 90-Day Plan

Status of Deliverables:

Completed

In Progress

In Review

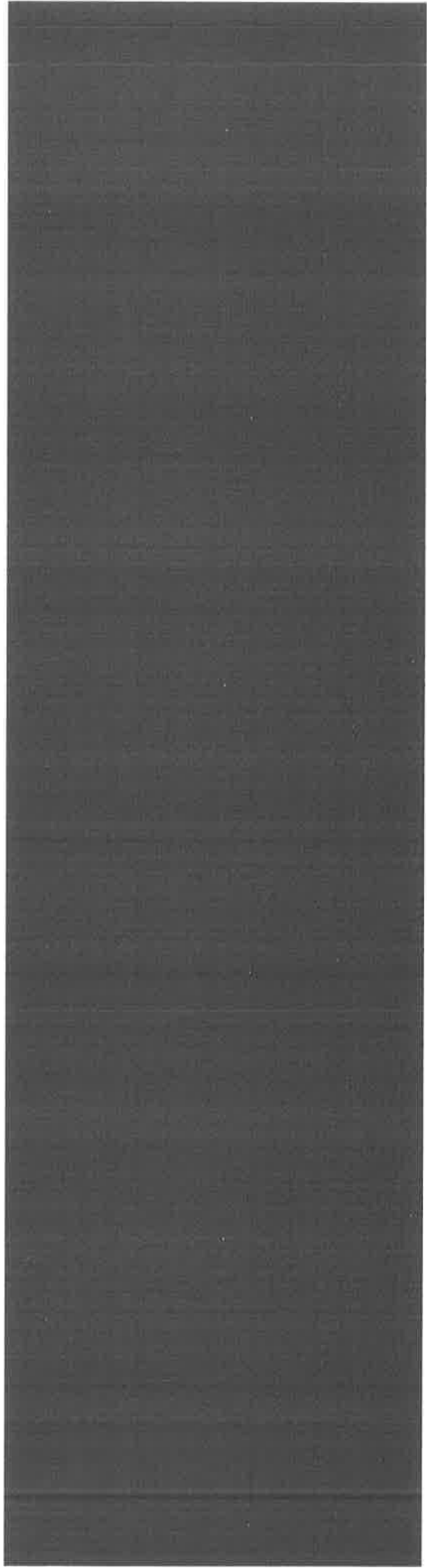
Canceled/Delayed

Terms:

LP: Landing page | LN: Lead Nurturing | EB: eBook | WF: Workflow | CP: Conversion Path | PPC: Pay-Per-Click | EM: Email | WP: White Paper

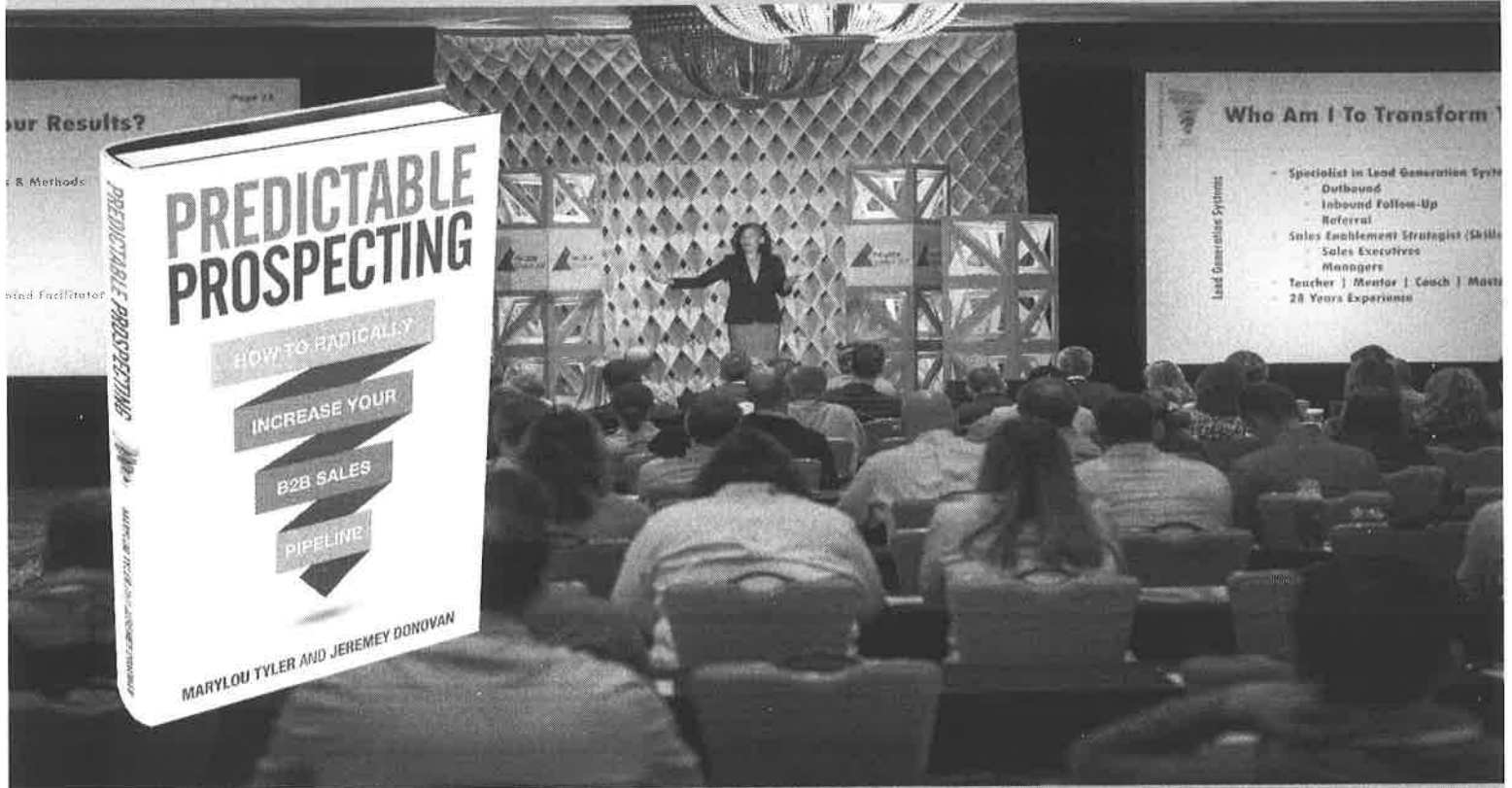
| October 2017                                   | Attract Visitors | Convert Leads | Close Sales | Other                         | Comments |
|--|------------------|---------------|-------------|-------------------------------|----------|
| Instert date for the monday beginning the week |                  |               |             | Monthly Performance Reporting |          |
| Instert date for the monday beginning the week |                  |               |             | Monthly Performance Reporting |          |
| Instert date for the monday beginning the week |                  |               |             |                               |          |
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**Predictable Prospecting™**  
**with Marylou Tyler**





# SalesQualia Client Intensive

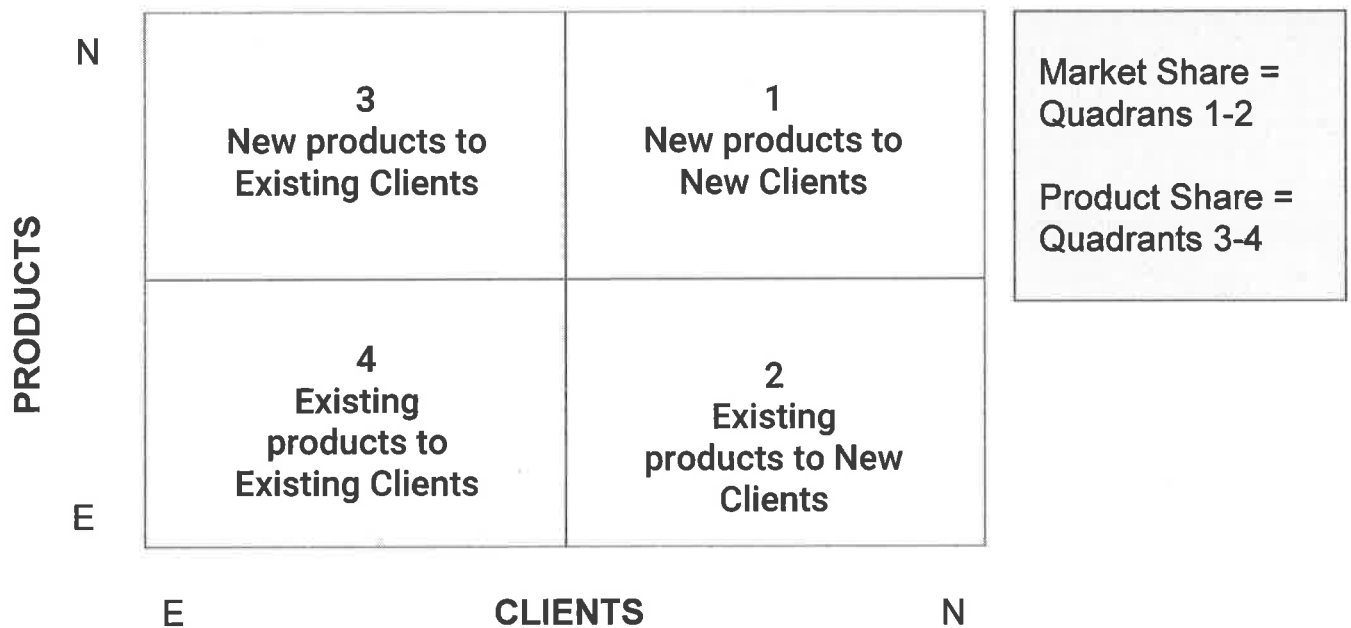


## Predictable Prospecting Workbook

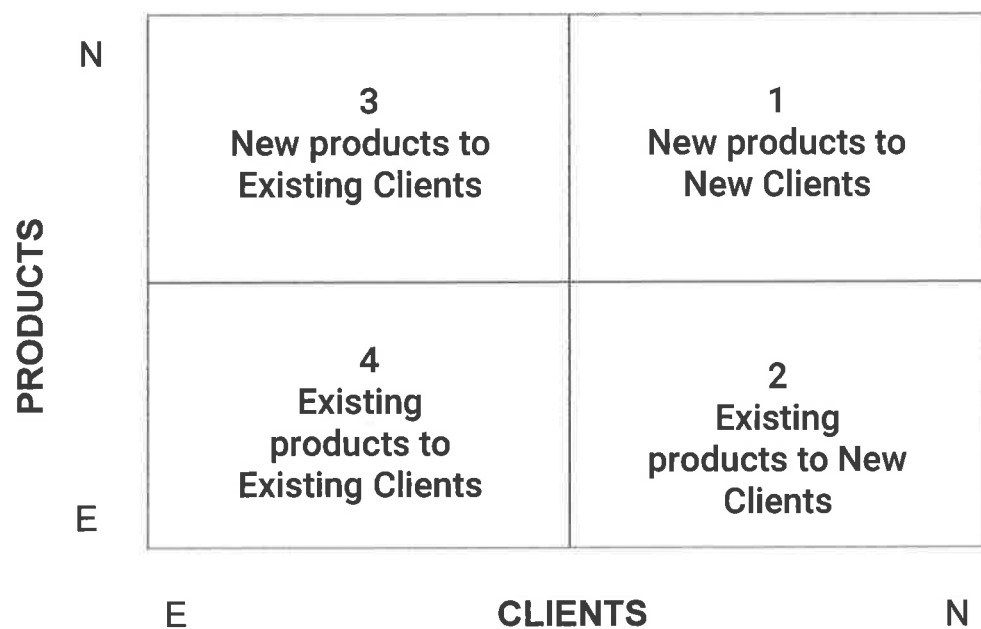
This workbook is also available as a recorded course:  
<https://predictableedu.com/courses/getting-to-predictable-prospecting/>

# A1: Market Segment

Q: What market do I serve?



**Exercise:** Circle your market segment(s).

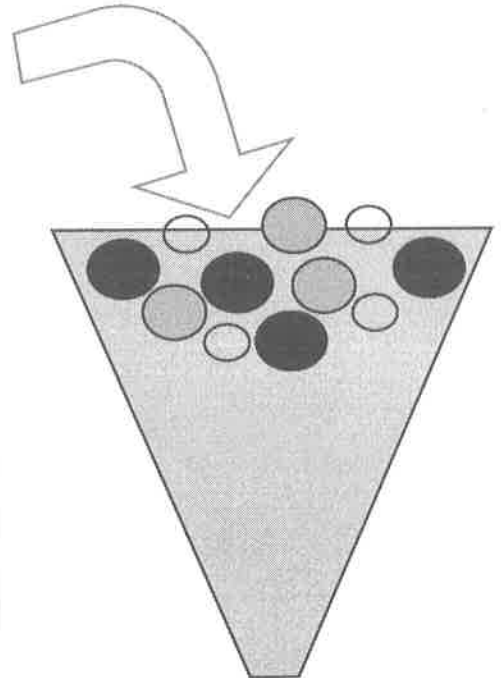


# Notes

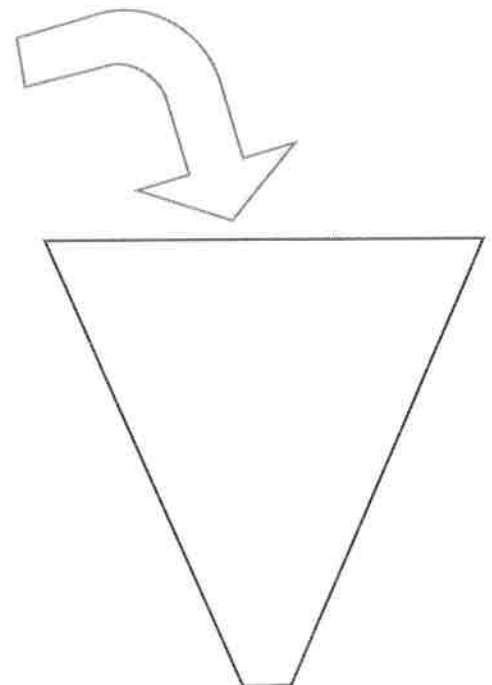
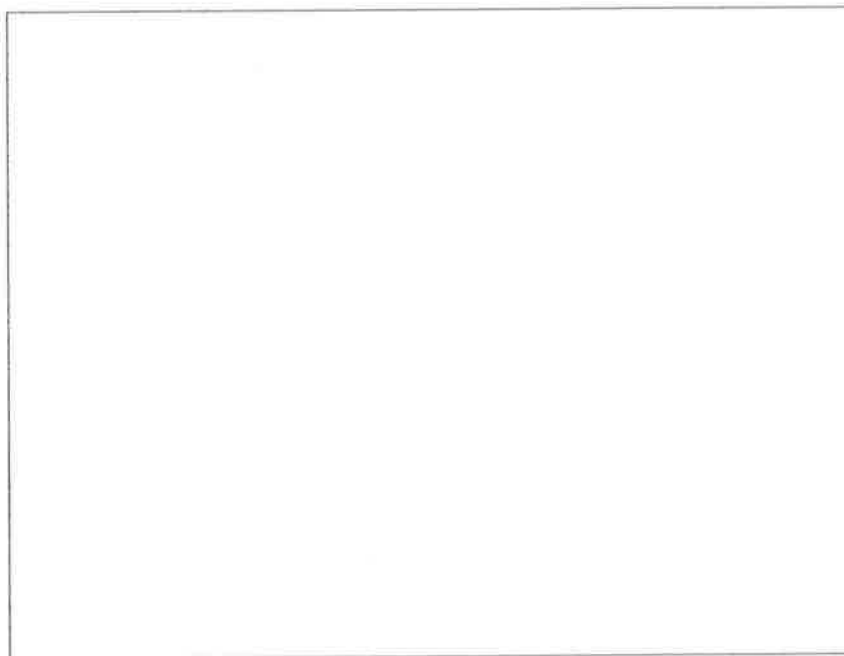
Market Segment Notes:

# A2: Lead Source

Q: What lead sources am I working?



**Exercise:** Map your lead sources.

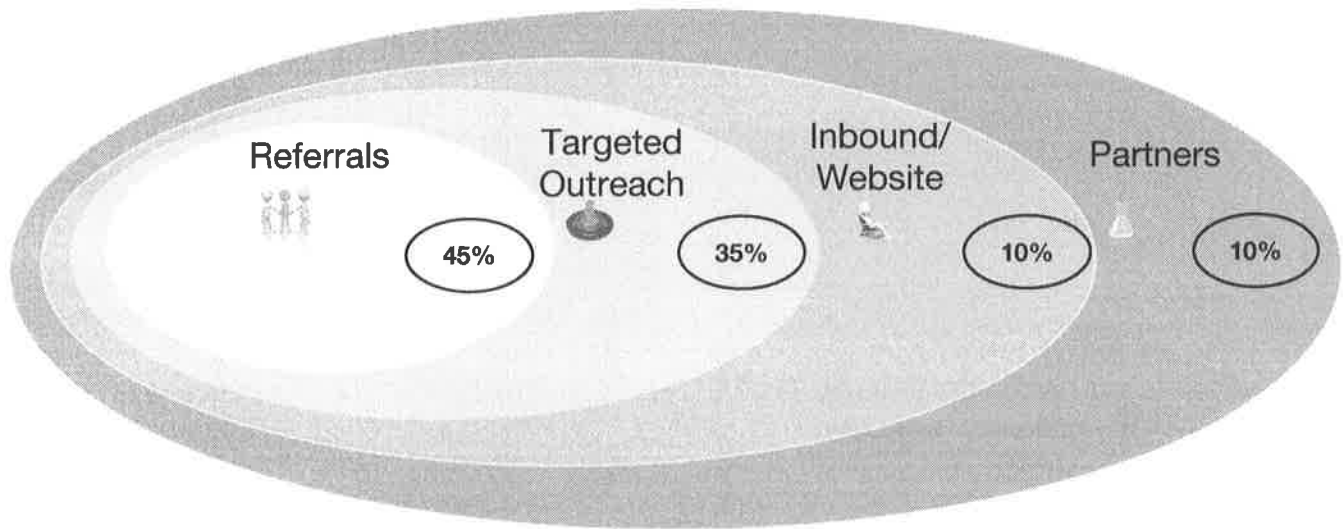


# Notes

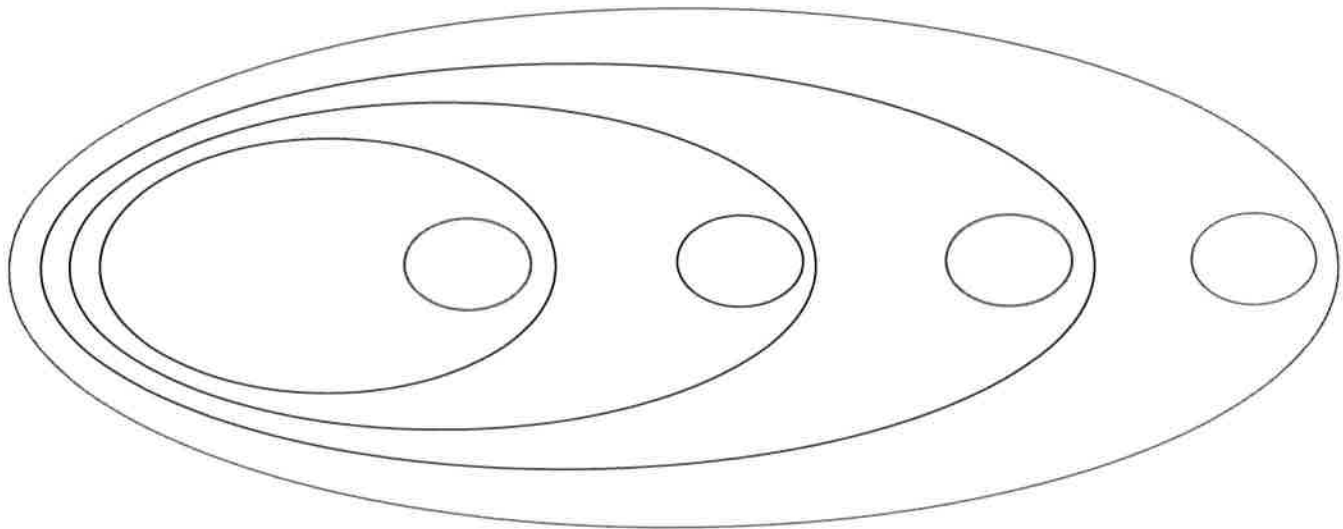
Lead Sources:

# B: Lead Mix

Q: What is my ideal lead mix?



**Exercise:** Map your lead mix.



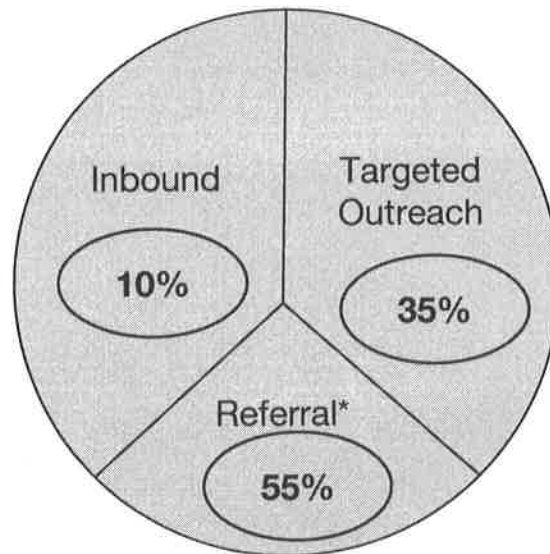
# B: Lead Categories

Q: In which of 3 buckets do my leads fall?

## Inbound

### Characteristics

- High volume
- Low value
- Usually lowest cost



## Targeted Outreach

- Low volume
- Highest value
- Scalable & predictable

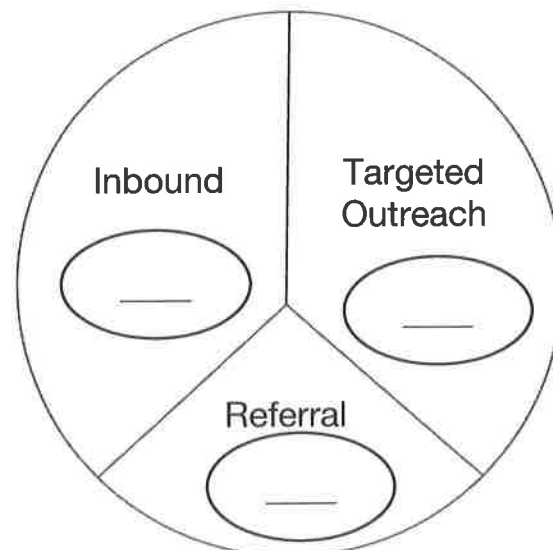
## Referral

- Lower volume
- Highest value
- Hard to scale

*\*Note: Partners + Referral = 55% for our example*

**Exercise:**

Designate your lead categories

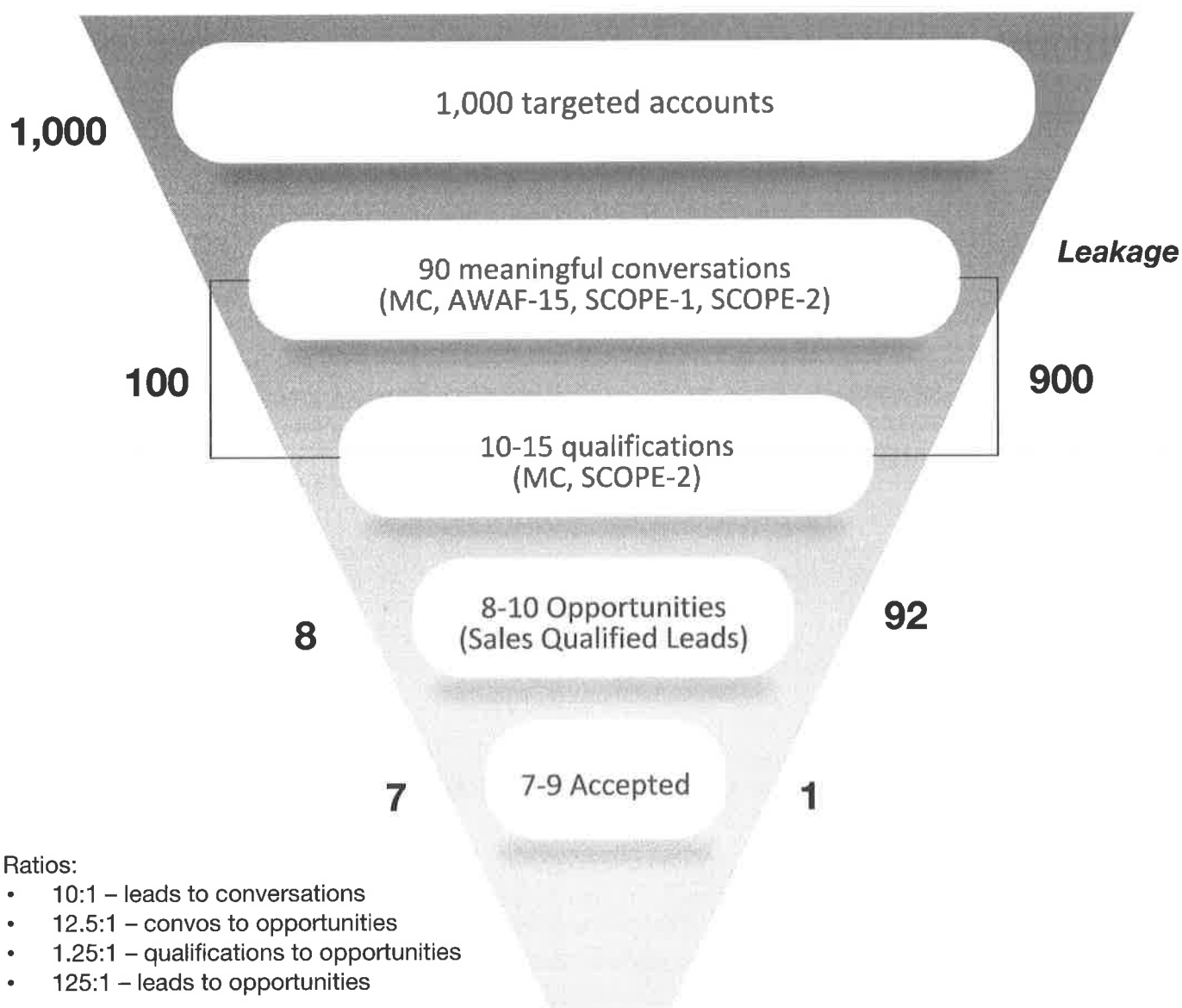


# C: Opportunity Waterfall

## Q: What is my Outreach Opportunity waterfall?

Lead to conversation ratios, conversation to opportunity ratios

Example – Monthly Waterfall – Tier 1 accounts (see Section B – page 6)



### Ratios:

- 10:1 – leads to conversations
- 12.5:1 – convos to opportunities
- 1.25:1 – qualifications to opportunities
- 125:1 – leads to opportunities

### Multipliers:

- 0.1 – leads to conversations
- 0.08 – convos to opportunities
- 0.8 – qualifications to opportunities
- 0.008 – leads to opportunities

### Codes:

- MC – Meaningful Conversation
- AWAf – 15min Are-we-a-fit
- SCOPE-1 – 1 hour 1 stakeholder
- SCOPE-2 – 2 hour, multi-stakeholder



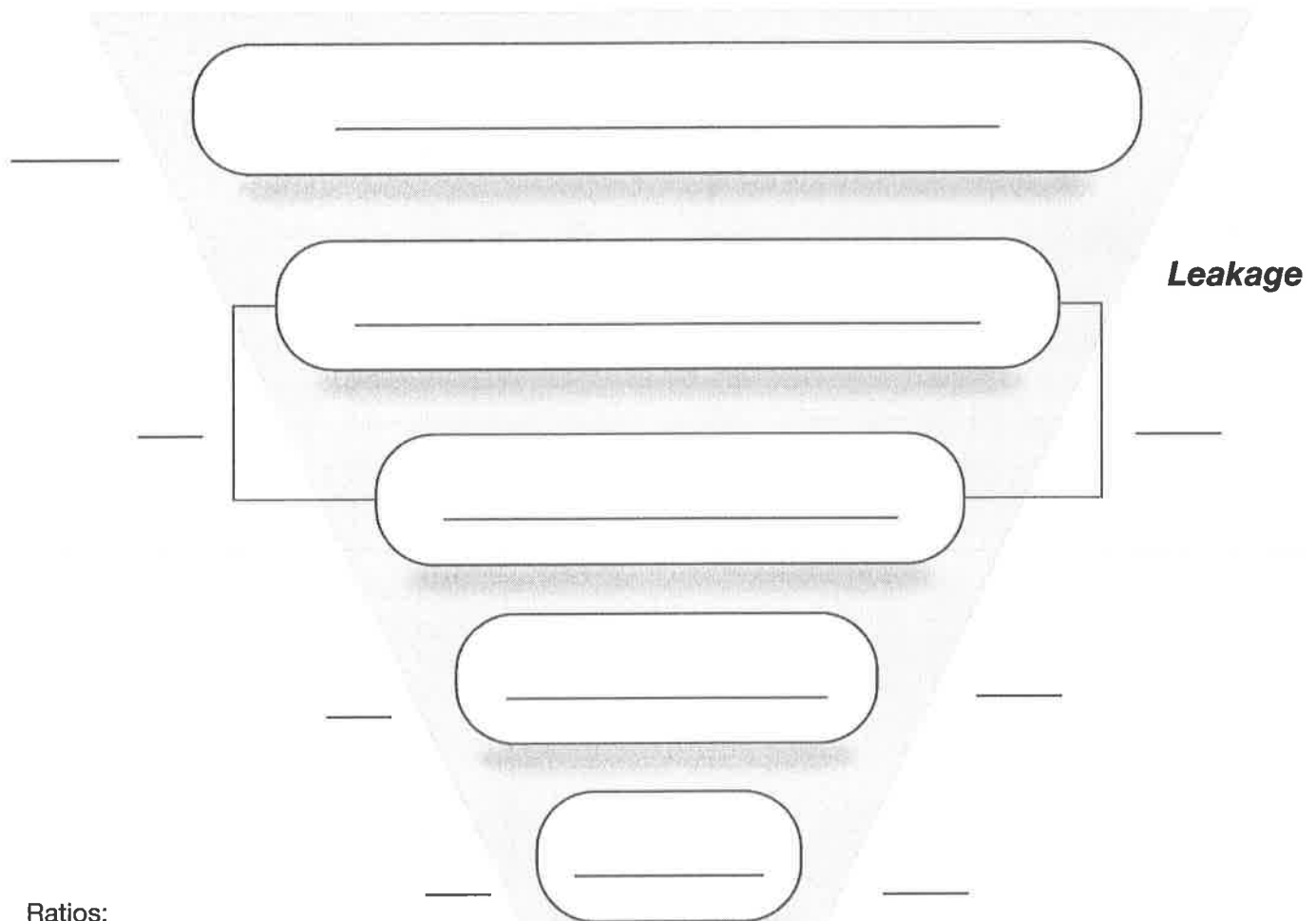
# Notes

Opportunity Waterfalls:

# C: Waterfall – Outreach (Outbound)

## Exercise: Calculate your opportunity waterfall

Lead to conversation ratios, conversation to opportunity ratios



### Ratios:

- \_\_\_\_\_ – leads to conversations
- \_\_\_\_\_ – convos to opportunities
- \_\_\_\_\_ – qualifications to opportunities
- \_\_\_\_\_ – leads to opportunities

### Multipliers:

- \_\_\_\_\_ – leads to conversations
- \_\_\_\_\_ – convos to opportunities
- \_\_\_\_\_ – qualifications to opportunities
- \_\_\_\_\_ – leads to opportunities

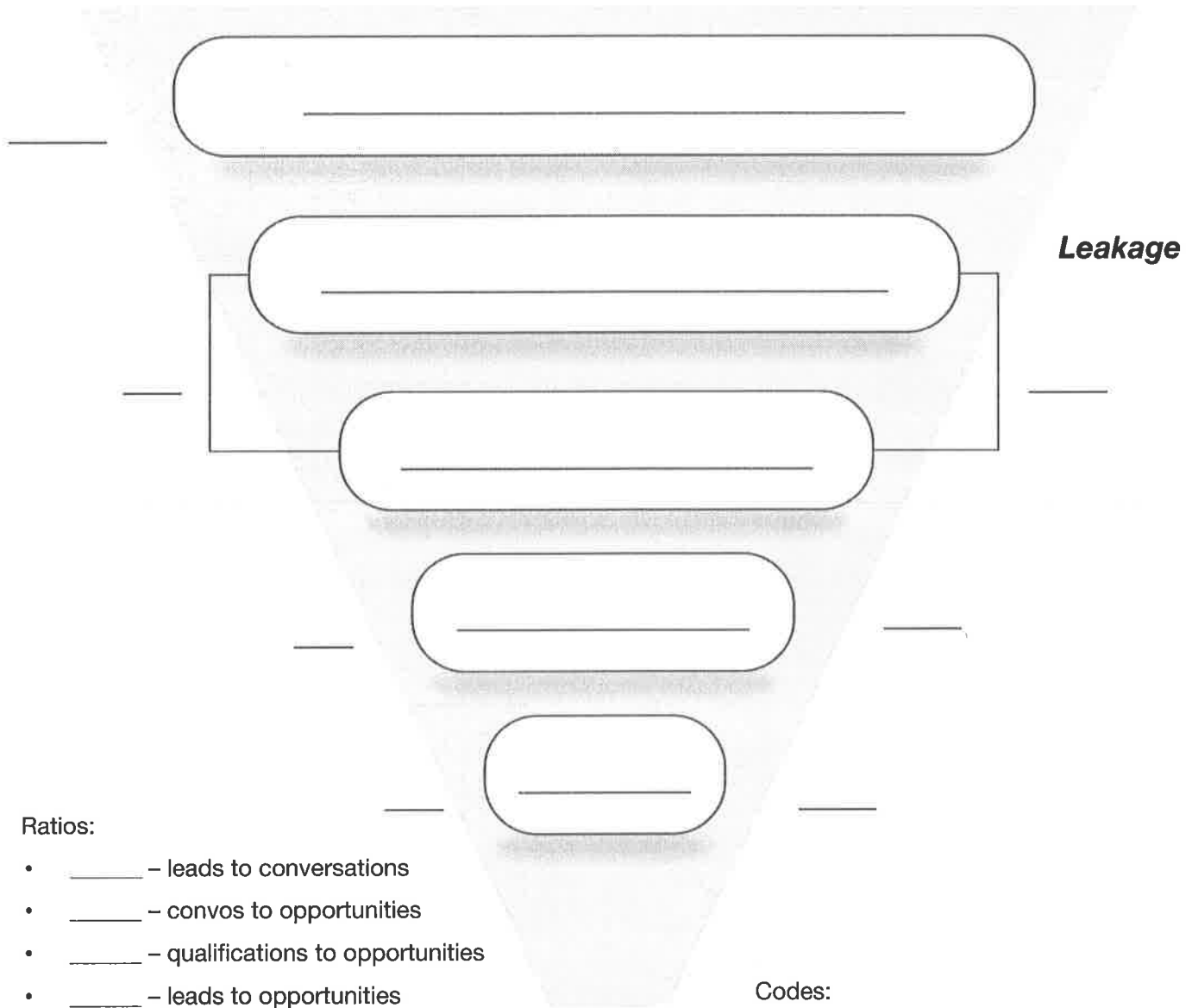
### Codes:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# C: Waterfall – Inbound

## Exercise: Calculate your opportunity waterfall

Lead to conversation ratios, conversation to opportunity ratios



### Ratios:

- \_\_\_\_\_ – leads to conversations
- \_\_\_\_\_ – convos to opportunities
- \_\_\_\_\_ – qualifications to opportunities
- \_\_\_\_\_ – leads to opportunities

### Multipliers:

- \_\_\_\_\_ – leads to conversations
- \_\_\_\_\_ – convos to opportunities
- \_\_\_\_\_ – qualifications to opportunities
- \_\_\_\_\_ – leads to opportunities

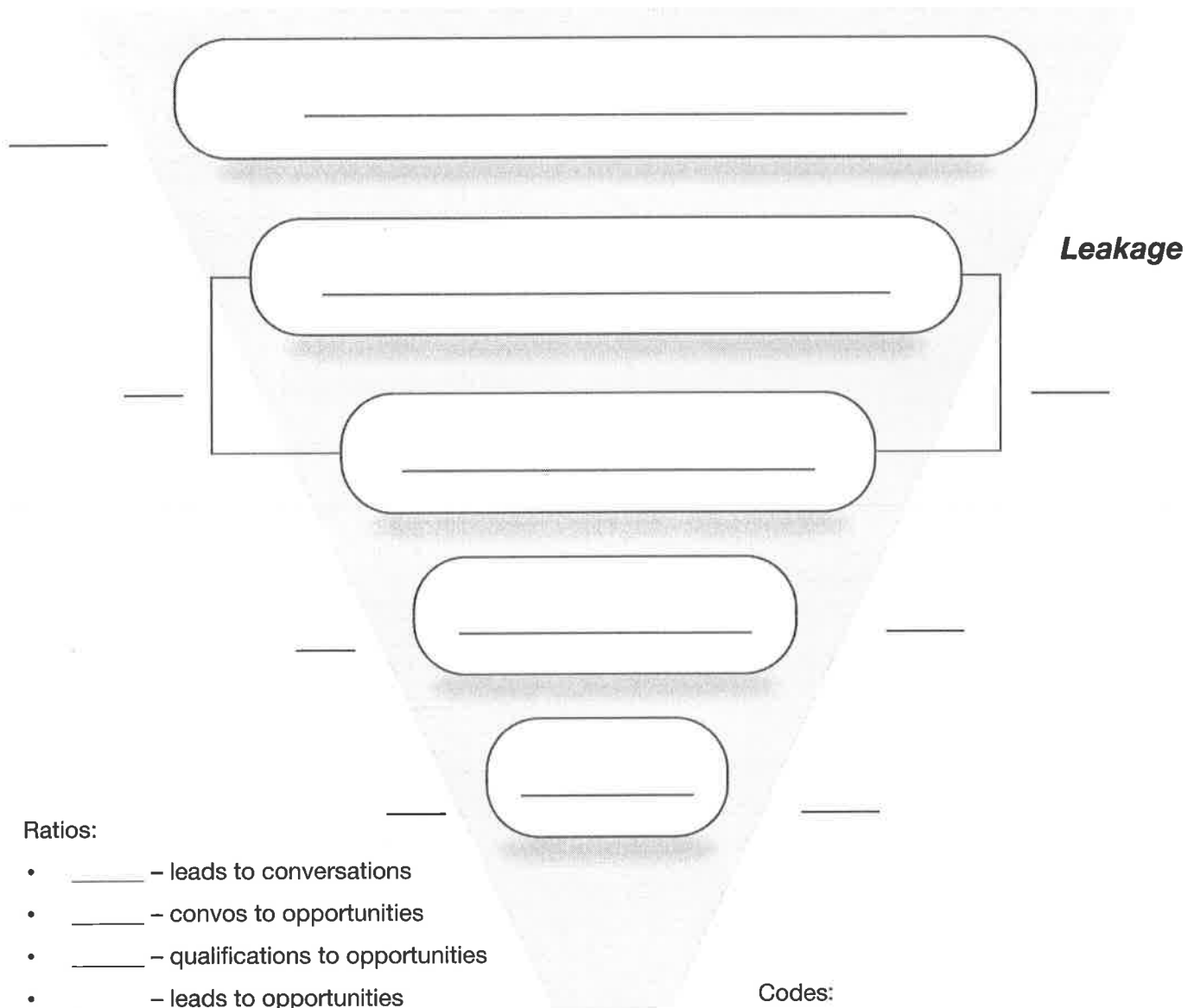
### Codes:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# C: Waterfall – Referral

## Exercise: Calculate your opportunity waterfall

Lead to conversation ratios, conversation to opportunity ratios



### Ratios:

- \_\_\_\_\_ - leads to conversations
- \_\_\_\_\_ - convos to opportunities
- \_\_\_\_\_ - qualifications to opportunities
- \_\_\_\_\_ - leads to opportunities

### Multipliers:

- \_\_\_\_\_ - leads to conversations
- \_\_\_\_\_ - convos to opportunities
- \_\_\_\_\_ - qualifications to opportunities
- \_\_\_\_\_ - leads to opportunities

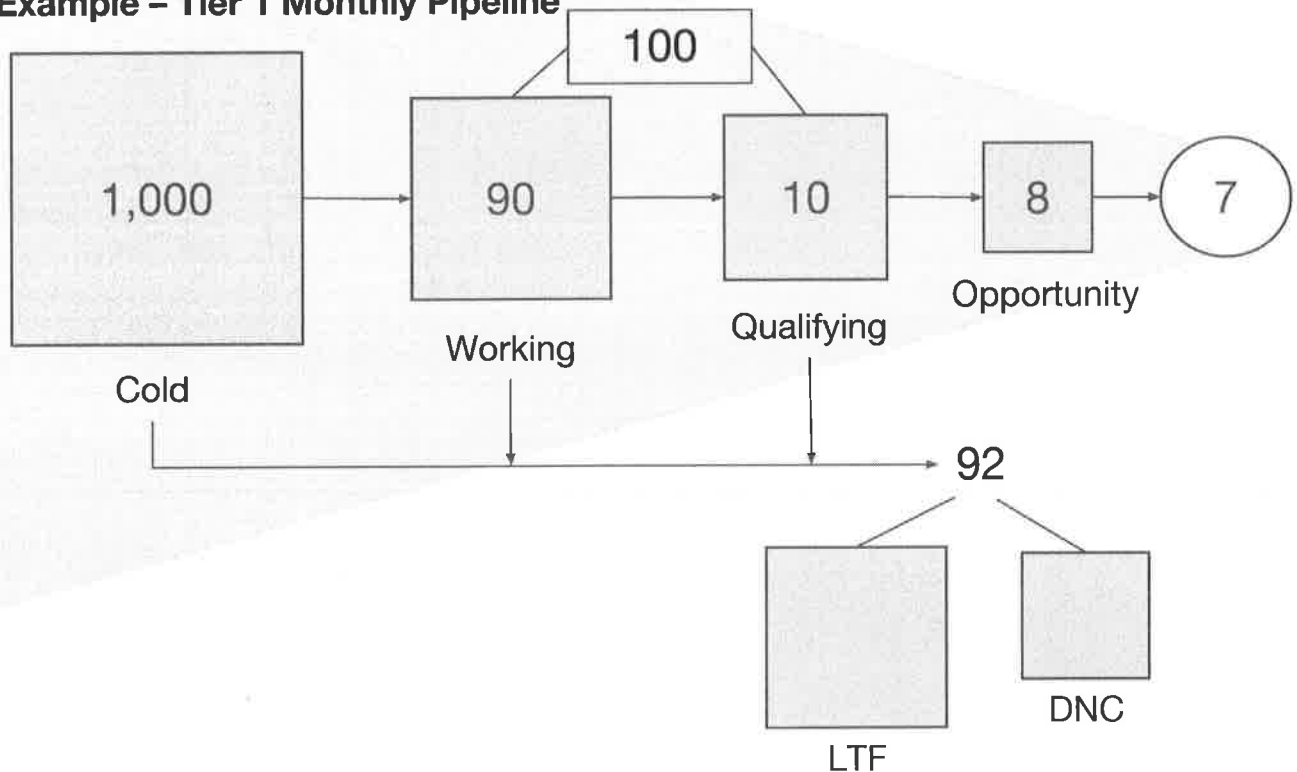
### Codes:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# D: Outreach Pipeline

Q: What do I do, with whom, how, and when?

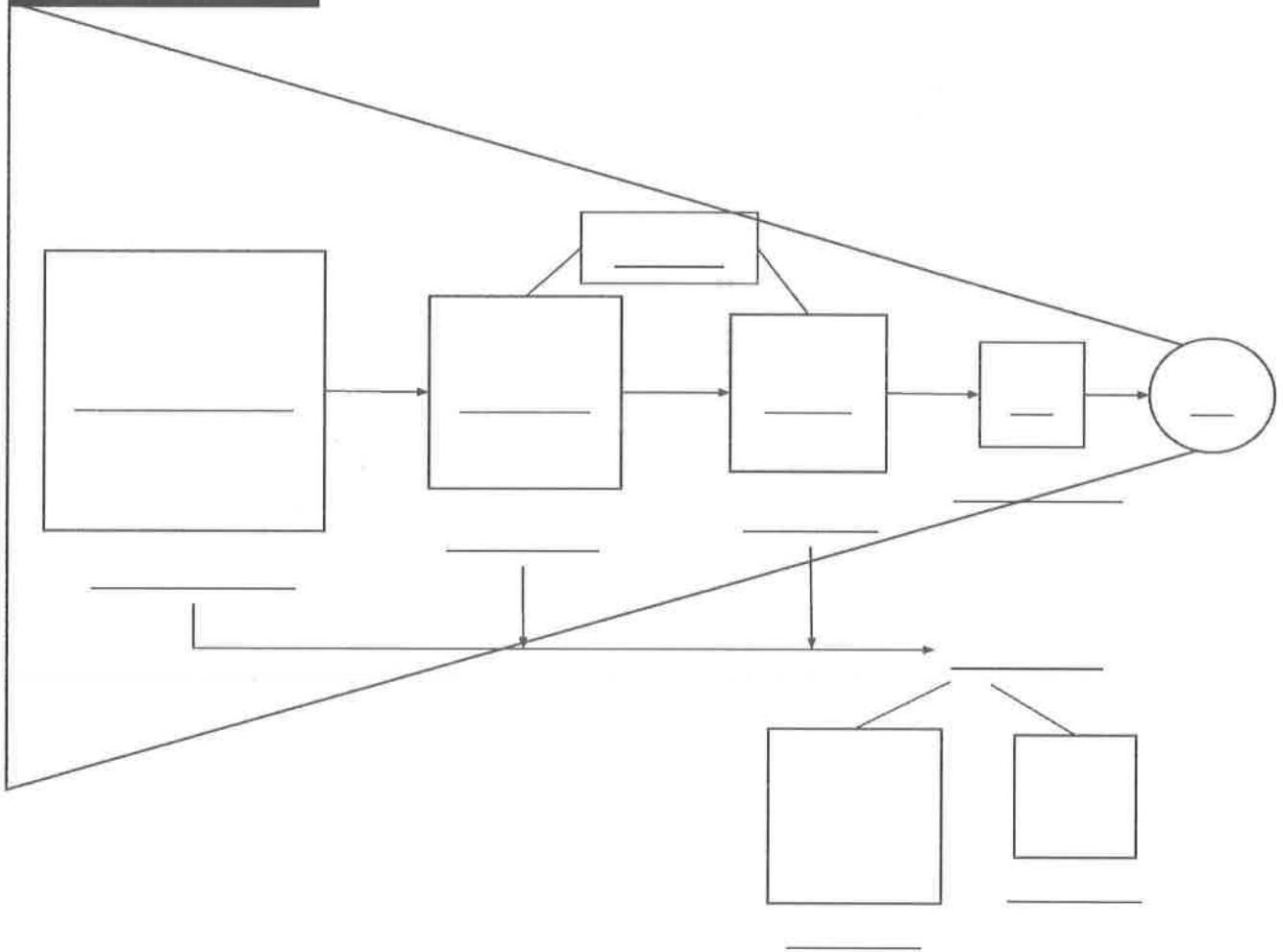
**Example – Tier 1 Monthly Pipeline**



| Stage       | Description   |
|-------------|---|
| Cold        | 1,000 targeted records – no response yet                  |
| Working     | 90 conversations – pre qualification (MC, AWAFF, SCOPE-1) |
| Qualifying  | 10 conversations – qualification (SCOPE-2, MC)            |
| Opportunity | Passed qualification, awaiting acceptance                 |
| DNC         | Do-Not-Contact (not a fit, never will be a fit)           |
| LTF         | Long-Term-Follow-Up (may be a fit, someday, but not now)  |

# D: Outreach Pipeline

**Exercise:** Draw Your Outreach Pipeline



| Stage | Description |
|-------|-------------|
|       |             |
|       |             |
|       |             |
|       |             |
|       |             |
|       |             |

# E: Workflow

Q: What daily activities matter most?

| Stage         | Description – Tier 1 Opportunities                        |
|---------------|---|
| Cold          | 1,000 targeted records – no response yet                  |
| Working       | 90 conversations – pre qualification (MC, AWAFF, SCOPE-1) |
| Qualifying    | 10 conversations – qualification (SCOPE-2, MC)            |
| Activity      | Weekly Goals  |
| E-mail        | 250 net new e-mails/week (1,000 per month)                |
| Conversations | 20 per week, 5 per day (100 per month)                    |

**GOAL:** Daily Call Time ~ 5 Hours

| AM               |   |                    | PM   |
|------------------|---|--------------------|--|
| FIRST 15 MINUTES | <ul style="list-style-type: none"> <li>Write down 3 goals for the day</li> <li>Review plan for the day</li> </ul>   | 1 HOUR             | <ul style="list-style-type: none"> <li>SCOPE-1 Call</li> </ul>   |
| 30 MINUTES       | <ul style="list-style-type: none"> <li>Handle e-mail responses &amp; tasks</li> <li>Research for hyper-personalization</li> </ul>                             | 30 MINUTES         | <ul style="list-style-type: none"> <li>AE Tier1 Account Review</li> <li>Create tasks for next steps</li> <li>Schedule calls for AM block time</li> </ul>           |
| 30 MINUTES       | <ul style="list-style-type: none"> <li>Personal time (15 minutes)</li> <li>Plan 1<sup>st</sup> call session</li> </ul>  | 2 HOURS            | <ul style="list-style-type: none"> <li>SCOPE-2 call or</li> <li>Task Follow-up or</li> <li>MC, AWAFF or SCOPE-1 call</li> </ul>                                    |
| 2 HOURS          | <ul style="list-style-type: none"> <li>Block time – 2-hour phone time</li> <li>GOAL: 2-4 connects / hour</li> <li>GOAL: 5 meaningful conversations</li> </ul> | BEFORE YOU GO HOME | <ul style="list-style-type: none"> <li>Ready 25-50 contacts for e-mail</li> <li>GOAL: maintain consistent universe of 250 1<sup>st</sup> e-mail targets</li> </ul> |

# E: Workflow – A Schedule

**Exercise:** Outline your daily workflow

| Stage | Description of Activity |
|-------|-------------------------|
|       |                         |
|       |                         |
|       |                         |
|       |                         |

| Activity | Weekly Goals |
|----------|--------------|
|          |              |
|          |              |

**GOAL:** Daily Call Time ~ \_\_\_\_ Hours

**AM**

**PM**



# E: Workflow – B Schedule

**Exercise:** Outline your daily workflow

| Stage | Description of Activity |
|-------|-------------------------|
|       |                         |
|       |                         |
|       |                         |
|       |                         |

| Activity | Weekly Goals |
|----------|--------------|
|          |              |
|          |              |

**GOAL:** Daily Call Time ~ \_\_\_\_ Hours

**AM**

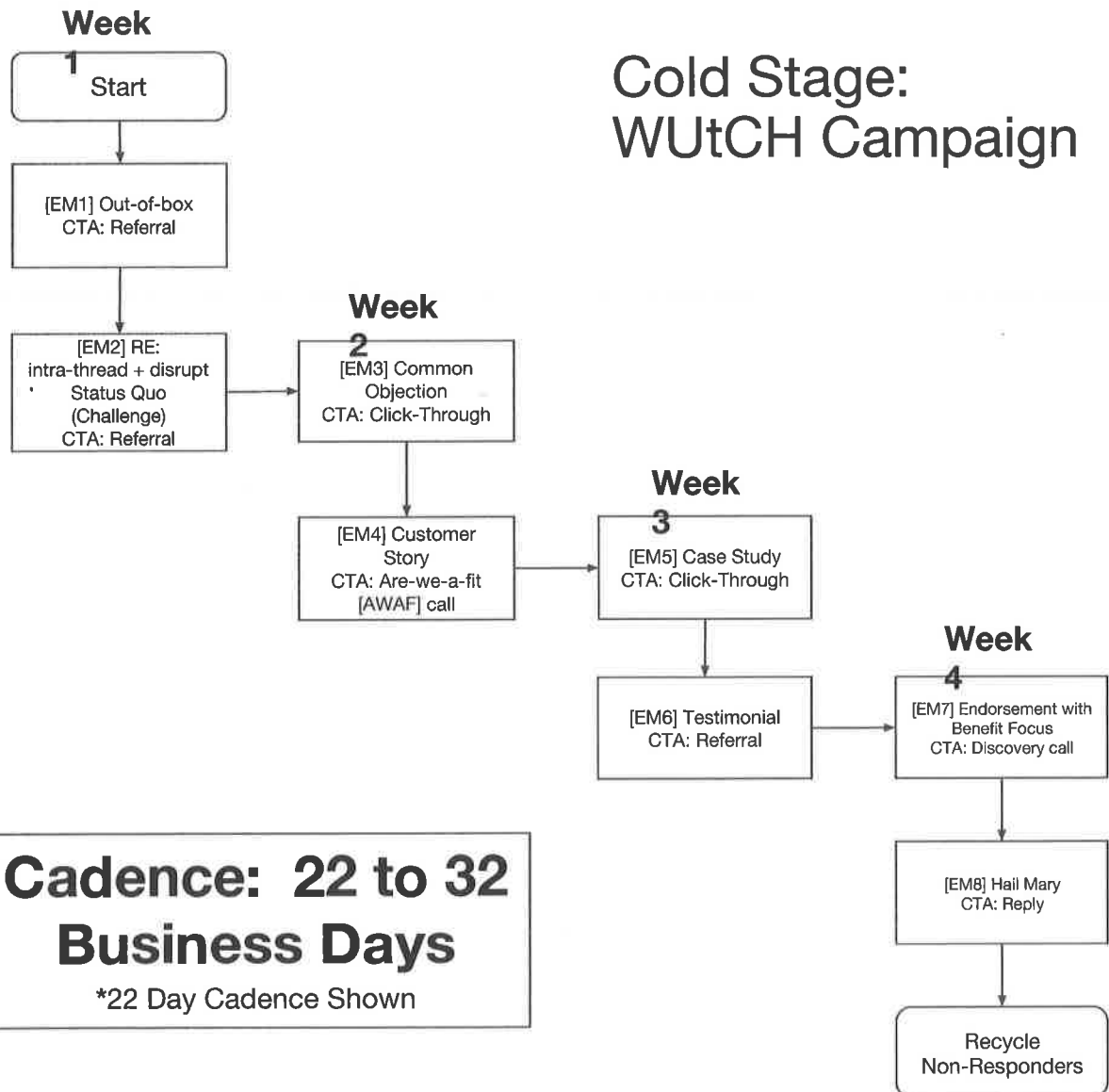
**PM**

|  |  |
|--|--|
|  |  |
|--|--|

# F: Content

Q: What do I say, to whom, how often, and on what channel?

| Stage   | Description – Tier 1 Opportunities                    |
|---------|---|
| Cold    | 1,000 targeted records – WUtCH campaign (E-Mail only) |
| Working | Hyper-Personalized Templates + Phone Follow-up        |
| Nurture | Data Driven Campaign – Track based on Pain point      |



# F: Content: Sequence Schematic

**Exercise:** Create Your Sequence

| Stage | Description |
|-------|-------------|
|       |             |

**Cadence:** \_\_\_ business days

# F: Content: Sequence #2

**Exercise:** Create Your Sequence

| Stage | Description |
|-------|-------------|
|       |             |

**Cadence:** \_\_\_ business days

# F: Content: Sequence #3

**Exercise:** Create Your Sequence

| Stage | Description |
|-------|-------------|
|       |             |

**Cadence:** \_\_\_\_ business days

# F: Content: Sequence #\_\_\_\_

**Exercise:** Create Your Sequence

| Stage | Description |
|-------|-------------|
|       |             |

**Cadence:** \_\_\_\_ business days

# G: Tracking

Q: What are my actionable metrics?

| Stage       | #   | Freq    | Goals – Tier 1 Opportunities       |
|-------------|-----|---------|------------------------------------|
| Cold        | 250 | Weekly  | E-mails (RESP)                     |
| Working     | 3   | Daily   | Conversations (MC, AWAFF, SCOPE-1) |
| Qualifying  | 1   | Daily   | Conversations (MC, SCOPE-2)        |
| Opportunity | 8   | Monthly | Qualified Opportunities            |
|             |     |         |                                    |
|             |     |         |                                    |
|             |     |         |                                    |

| Stage      | %     | Freq     | Goals – Tier 1 Opportunities  |
|------------|-------|----------|---|
| Cold       | 7-9   | Sequence | E-mail response rate (RESP - positive, negative, neutral)           |
| Cold       | 13-15 | Sequence | Telephone response rate (FTRP-found-the-right-person mapping calls) |
| Cold       | 40    | Weekly   | Movement of accounts from Cold to Working                           |
| Working    | 45    | Weekly   | Movement of accounts from Working to Qualifying                     |
| Qualifying | 45    | Weekly   | Movement of accounts form Qualifying to Opportunity                 |
| Qualifying | 90    | Opp      | % acceptance of Opportunities by AE                                 |
|            |       |          |   |

# Notes

Tracking KPIs:



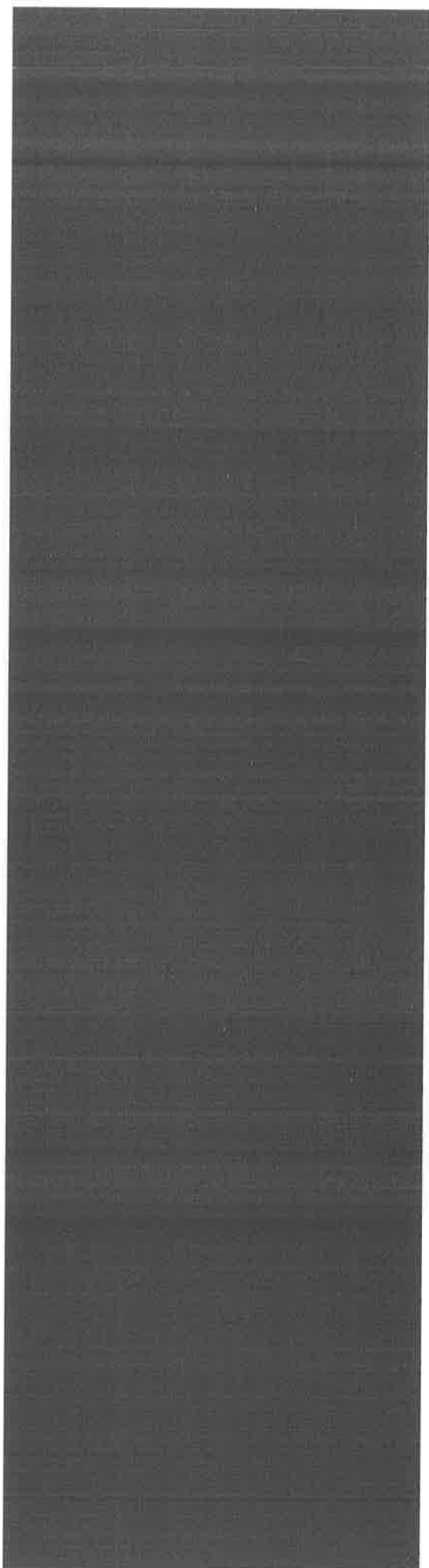
# G: Tracking

**Exercise:** Create Your Actionable Metrics

| Stage | # | Freq | Goals – Tier 1 Opportunities |
|-------|---|------|------------------------------|
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |

| Stage | % | Freq | Goals – Tier 1 Opportunities |
|-------|---|------|------------------------------|
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |
|       |   |      |                              |

# **The 100-Day Sales Plan**



# THE STARTUP SELLING 100-DAY PROJECT PLANNER

|  |   |   |
|--|---|---|
| <p>Project Name:</p>   | <p>Description:</p>   | <p>100 Day Target(s):</p> <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> |
| <p>Successfully completing this project is important because...</p>  | <p>If I reach my target, my reward(s) will be:</p>  | <p>If I don't reach my target, my consequence(s) will be:</p>                                   |
| <p>5 Key Steps/Tasks:</p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol> | <p>My first 3 Steps are:</p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol> |   |

# THE STARTUP SELLING 100-DAY PROJECT PLANNER

|   |   |   |
|---|---|---|
| <p>Project Name:</p>  | <p>Description:</p>   | <p>100 Day Target(s):</p> <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> |
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# THE STARTUP SELLING 100-DAY PROJECT PLANNER

|  |   |   |
|--|---|---|
| <p>Project Name:</p>   | <p>Description:</p>   | <p>100 Day Target(s):</p> <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> |
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# THE STARTUP SELLING 100-DAY PROJECT PLANNER

|  |   |   |
|--|---|---|
| <p>Project Name:</p>   | <p>Description:</p>   | <p>100 Day Target(s):</p> <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> |
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# THE STARTUP SELLING 100-DAY PROJECT PLANNER

|   |   |   |
|---|---|---|
| <p>Project Name:</p>  | <p>Description:</p>   | <p>100 Day Target(s):</p> <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> |
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# SalesQualia Sales & Business Book Recommendations

**Startup Selling: How to sell if you really, really have to and don't know how** by Scott Sambucci

**52 Sales Questions Answered: A Q&A Guide to Sales & Customer Development** by Scott J Sambucci

**The Challenger Sale: Taking Control of the Customer Conversation** by Matthew Dixon and Brent Adamson

**The Challenger Customer: Selling to the Hidden Influencer Who Can Multiply Your Results** by Brent Adamson and Matthew Dixon

**Predictable Revenue: Turn Your Business Into A Sales Machine With The \$100 Million Best Practices Of Salesforce.com** by Aaron Ross and Marylou Tyler

**Predictable Prospecting: How to Radically Increase Your B2B Sales Pipeline** by Marylou Tyler and Jeremy Donovan

**The Slow Sale: How Slowing Down Wins More Deals** by Brandon Bruce

**Just Listen: Discover the Secret to Getting Through to Absolutely Anyone** by Mark Goulston

**Great Demo! How To Create And Execute Stunning Software Demonstrations** by Peter Cohan

**From Impossible To Inevitable: How Hyper-Growth Companies Create Predictable Revenue** by Aaron Ross and Jason Lemkin

**Customer Success: How Innovative Companies Are Reducing Churn and Growing Recurring Revenue** by Nick Mehta, Dan Steinman and Lincoln Murphy



**The Machine: A Radical Approach to the Design of the Sales Function** by Justin Roff-Marsh

**Work the System: The Simple Mechanics of Making More and Working Less** (Revised 3rd edition, 2017) by Sam Carpenter

**The Team Success Handbook** by Shannon Waller (Author)

**Compensating the Sales Force, Third Edition: A Practical Guide to Designing Winning Sales Reward Programs** by David J. Cichelli

**Swim with the Sharks Without Being Eaten Alive: Outsell, Outmanage, Outmotivate, and Outnegotiate Your Competition** by Harvey B. Mackay

**The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It** by Michael E. Gerber

**The Hard Thing About Hard Things: Building a Business When There Are No Easy Answers** by Ben Horowitz

**Zero to One: Notes on Startups, or How to Build the Future** by Peter Thiel and Blake Masters

**Essentialism: The Disciplined Pursuit of Less** by Greg McKeown

**Principles: Life and Work** by Ray Dalio

**So Good They Can't Ignore You: Why Skills Trump Passion in the Quest for Work You Love** by Cal Newport

**The Artist's Way: 25th Anniversary Edition** by Julia Cameron

**The Last Lecture** by Randy Pausch and Jeffrey Zaslow

**Man's Search for Meaning** by Viktor E. Frankl