



IDENTIFY & CONNECT

THE CENTER FOR
SALES STRATEGY



Our Time Today:

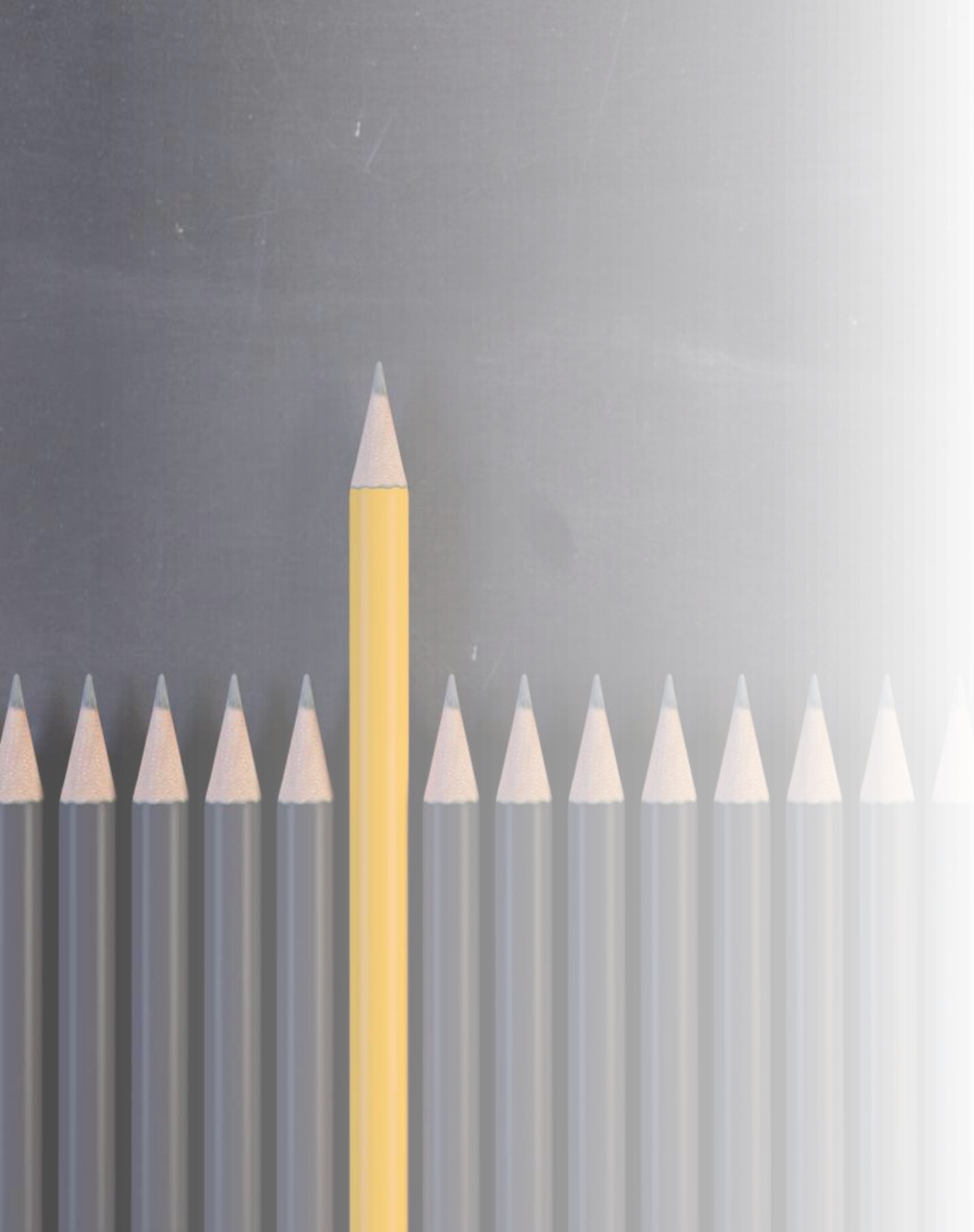
- Identify
- Connect
- Take Action
- Questions

IDENTIFY

- The Power of Targeting
- Finding Leads
- Qualifying Leads
- Target Business Profile



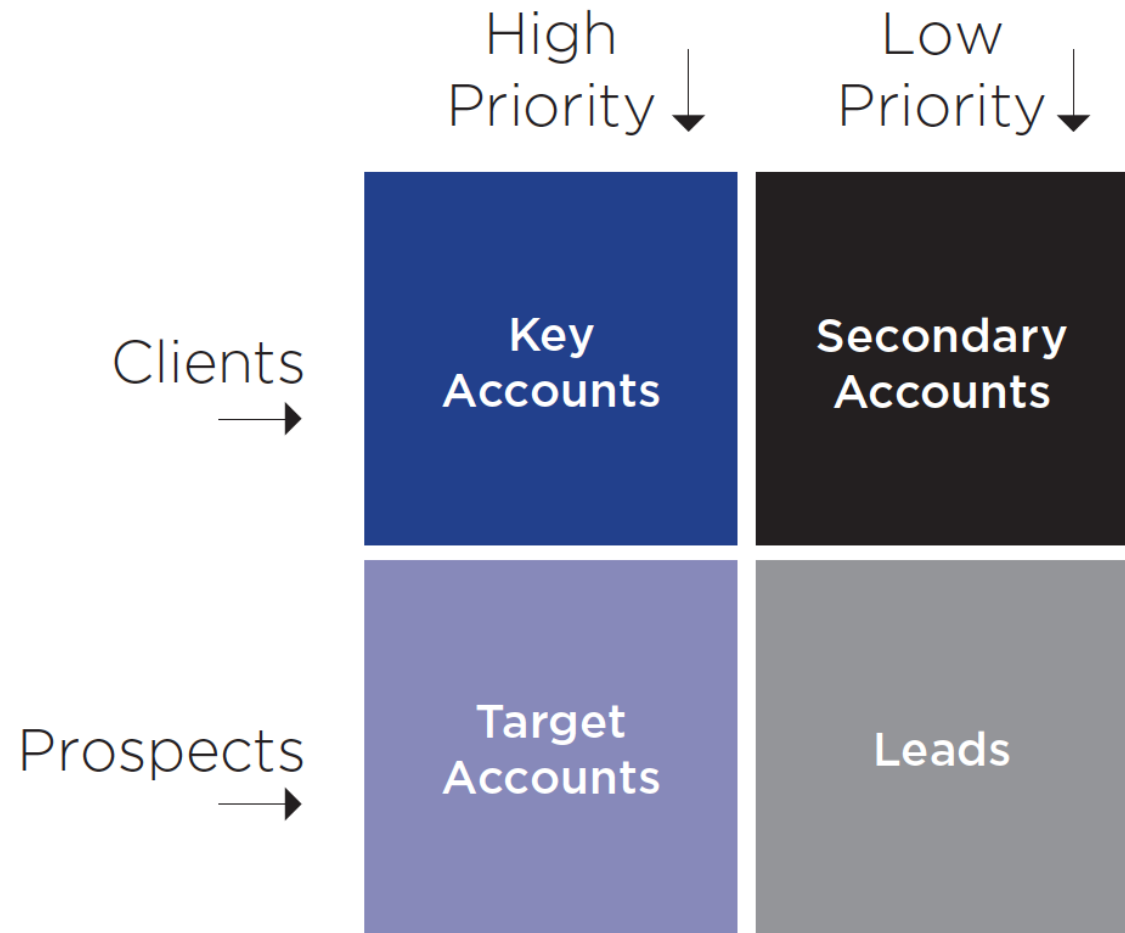
Spend more time on
fewer, but better
prospects



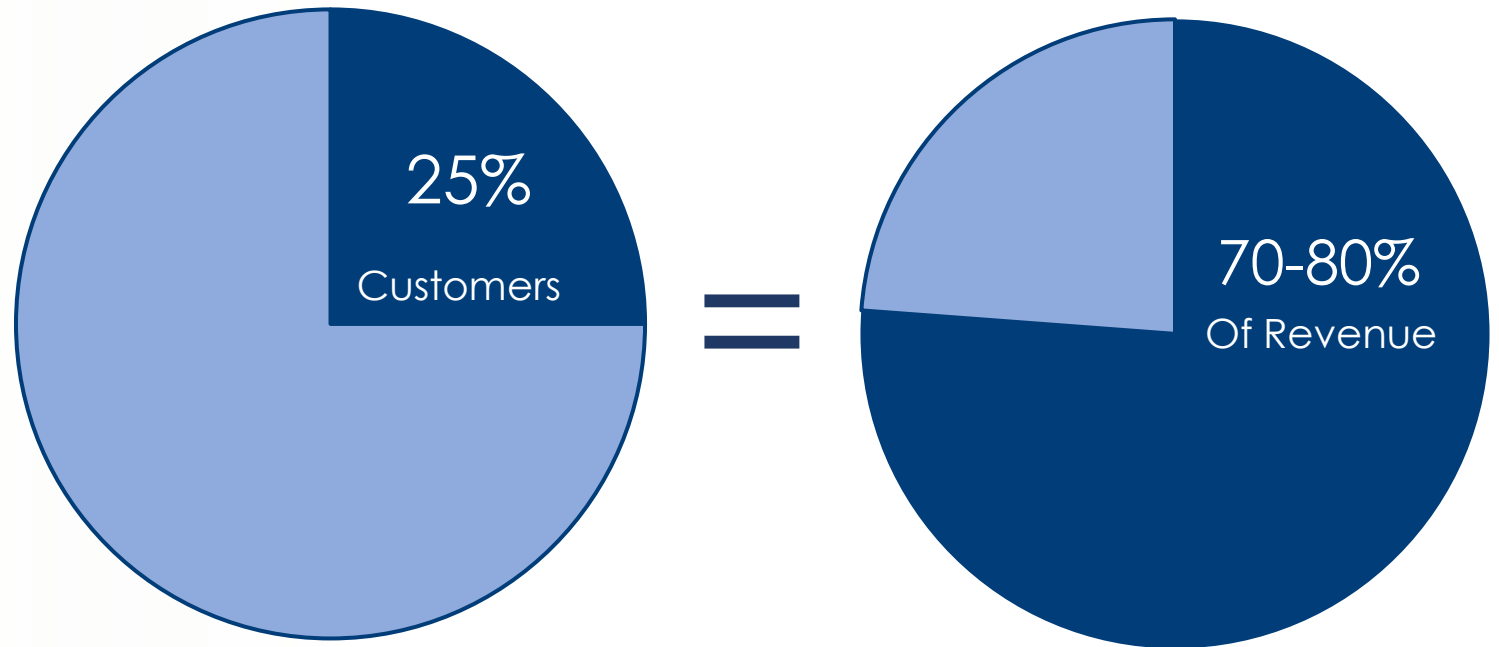
There is value in Quantity.

But move QUICKLY from
Quantity to Quality.

The Account List Management Strategy

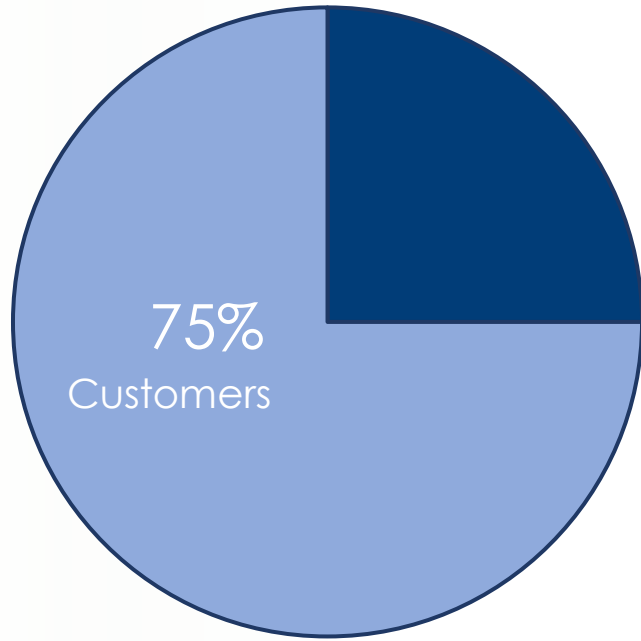


Key Accounts

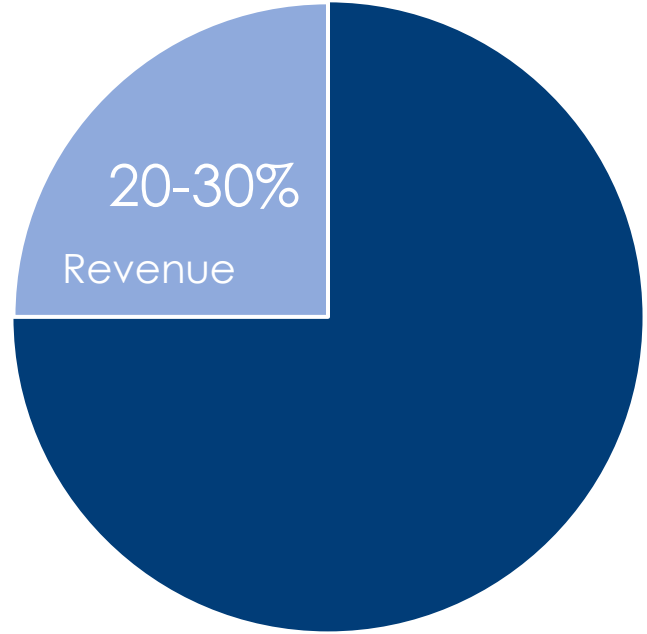




Secondary Accounts



=



Target Accounts



Qualified prospects with the potential to be key accounts.



Focus on no more than 10 target accounts (potentially less)



Leads

- Accounts that are still being researched
- Need to determine if they qualify as prospects
- “Targets in waiting”
 - Still researching
 - Not ready to classify as a Target

Identifying Target Accounts

- Happens in two stages:
 - Finding
 - Qualifying

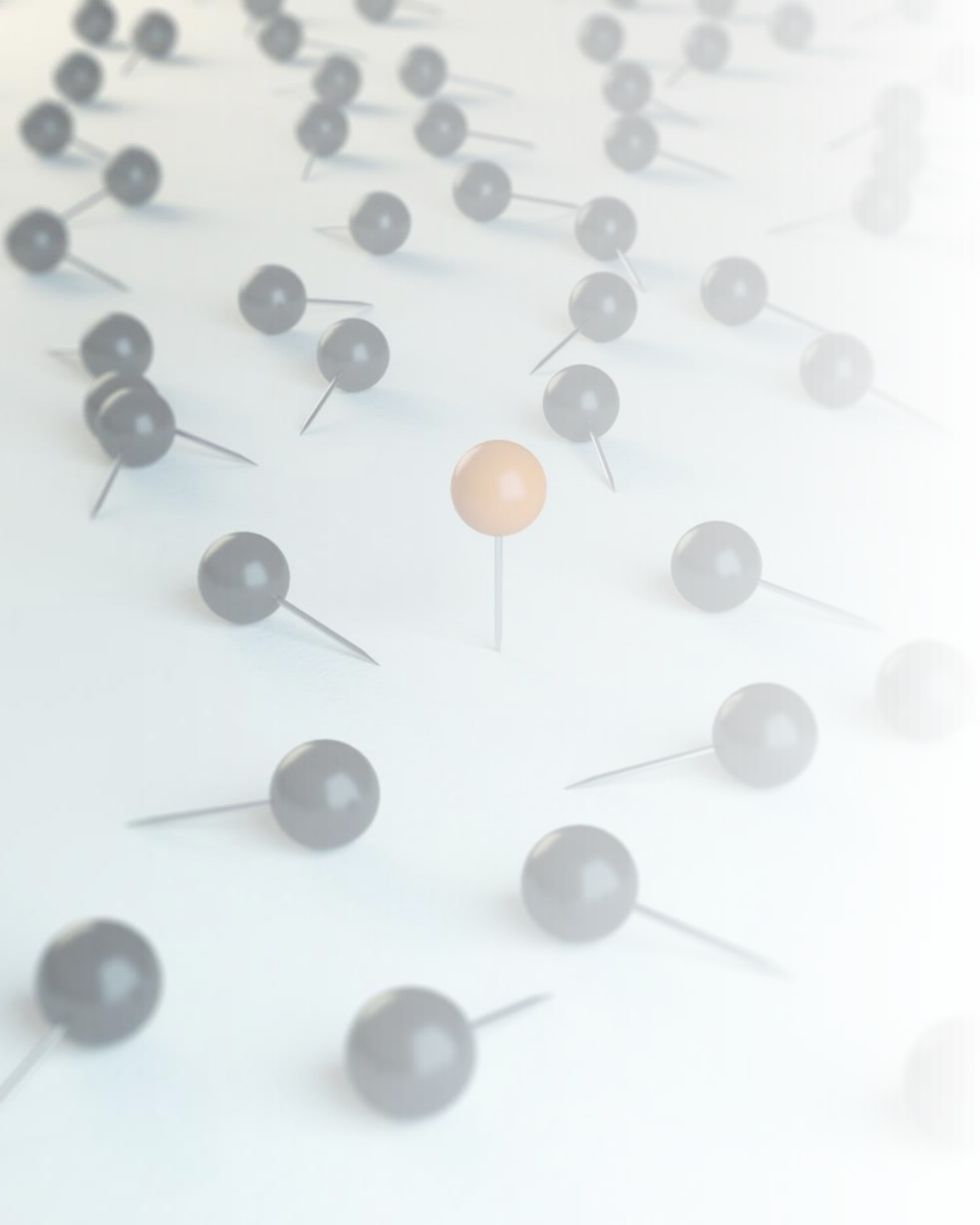


Start with Categories

- Is this category already spending money on advertising?
- Do you have a particular connection/expertise with this category?
- Is this an up-and-coming category?

Top Categories

- Automotive
- Home Repair
- HVAC
- Legal
- Medical
- Furniture



Where do you currently go to find your best leads?



From Categories to Leads

Referrals: Implies you are trusted and valued

Former Clients: Inactive or unclaimed accounts

Competitors: Study competitive media to see who is active in your categories

Additional Resources

- Local business magazines
- Local advertising
- Local event sponsors
- Sporting events sponsors
- Direct Mail
- Current events & news
- Companies you drive by
- Businesses you already work with
- New business licenses
- Business groups
- Business Directories
- Social Media
- Trade publications
- Networking events

Qualifying Leads

- Invest the time up front
- Know what you are looking for
- Qualify all your list at the same time



What criteria do you use to determine if a prospect is worthy of your time?

Target Business Profile

Some prospects are better than others, and *qualifying* them will help you determine which of the prospects you've identified should become a Target Account, Lead, or not pursued.

As you search for ideal clients, use the following criteria and the Target Business Profile Filter to determine which current *clients* have the greatest potential for growth and which *prospects* deserve the most time and attention.



Dollar Potential

- Could this client eventually spend at our Key Account level if motivated?
- Are there signs that this is a high-margin or high-volume product or service?
- Can this prospect afford to invest in our solution at a level to be successful?
- Could this account become one of the largest accounts our company works with?



Access

- Do I know the decision-making process at this company?
- Have I identified the decision-maker and key decision-influencers?
- What will I need to do to gain access to the decision-maker? How committed am I to doing that?
- Will I be able to move beyond the media buyer and get an appointment with someone who can direct long-term spending beyond agency avails?



Fit

- Evaluate the Fit factors that will have the most influence on your situation.
 - › **Product or service** – Can they benefit from the solutions we offer?
 - › **Local Focus** – Do they have a strong focus on the areas our solutions reach?
 - › **Change in their business or category** – Is there change in their situation that may create an opportunity for me to help?
 - › **Openness to solutions** – Do I see evidence that they will be open to developing a solution together?
 - › **Growth or trouble mode** – Are there signs the business is growing or in trouble? Are they in too much trouble to be able to help?
 - › **Seasonality** – Which time of year would they benefit most from our solutions?
 - › **Factors unique to your business** – Are there factors unique to our solutions that could benefit this prospect?

Target Business Profile

- Dollar Potential
- Access to the Decision Maker
- Fit

Dollar Potential



- Could this client eventually spend at the Key account level if they were motivated to do so?
- Does this business have the high volume, or high enough margins needed to afford my product and services?
- Can they spend at a level needed to be successful with us?



Dollar Potential

- Look for indicators:
 - Already spending in the market or platform
 - Regional reach
 - Number of locations
 - Number of “mouths to feed”
 - Size of retail location
 - Positive online reviews
 - Co-op opportunities
 - Website experience

Access

- Decision Maker:
 - Person or committee
 - The single source of “yes”
- Decision Influencers
 - Can't say yes, but a potential source of “no”
 - Potential source of support
 - Anyone the decision-maker allows to play a role in the decision-making process.

Fit Factors

Product/Service

- Is the product the right fit?

Local Focus

- Are they focused on the local area your company covers?

Changes in the Category

- Has there been a change in their category that creates an opportunity for you to help?

Growth or Trouble?

- Determine if the business is in growth or trouble mode

Seasonality

- Consider the calendar as you select businesses to target

Unique Fit Factors

- This can be anything your organization or industry needs to evaluate

Tools to Research

- Online Reviews (Yelp, Google)
- Social Media (LinkedIn, Facebook, Twitter, Instagram)
- Company Website
- Glassdoor
- Google Transparency Center
- Job Boards (Indeed, Monster, CareerBuilder)
- Better Business Bureau
- Media Monitors
- Meta Ad Library (includes all FB properties)

A conceptual image showing a group of business professionals in a meeting. In the foreground, two hands are shaking in a firm handshake. The background is a blurred office setting with other people. Overlaid on the image is a network of glowing blue lines and nodes, symbolizing digital connectivity and technology.

CONNECTING WITH PROSPECTS

CONNECT

- Professional Branding
- Valid Business Reasons
- Don't Give Up Process
- Setting the Stage for a Successful Meeting



Professional Branding

The goal of Professional Branding is to establish yourself as Trusted and Valued.

Empathy
+ Expertise
+ Problem Solving

= Trusted & Valued





Empathy

Speak their
language

Illustrate you
understand their
business

Sound like a
business owner
yourself






Expertise

Use Insights

Relating back to
their consumer

Identify potential
Desired Business
Results





Problem Solving

Case studies

Success stories

High concept ideas

Referrals

References





What do you want
your professional
brand to be?



It's about You
Not Your Product!

Your Professional Brand

Make your online brand reflect your professional brand:

- **LinkedIn-** keep your profile up to date.
- **Twitter-** what key words are you able to work into the short summary you provide?
- **Email Signature-** use this as another place to reinforce your professional brand

Everything you write, post on social media or send by email reflects your professional brand.



Why are Valid Business Reasons important?



Valid Business Reasons

- Connecting with decision makers is getting harder
- There is more competition for their time
- Breakthrough the clutter
- Your opportunity to demonstrate you can be trusted and valued



Building Your VBR

- Start with Insights
 - Highlight observations or trends that might impact their business
 - Indicate how they will impact their business
- Create urgency
- Apply the VBR framework to show Empathy, Expertise, and Problem Solving



The Anatomy of a Valid Business Reason



THE INSIGHT

According to the recent Understanding the Legal Consumer 2022 report:

- 66% of consumers contact 1-3 attorneys before making a final decision
- 26%, hire an attorney within a week of knowing they need one
- 81% of legal consumers say online reviews are somewhat or very important in their selection of an attorney

THE OPPORTUNITY

As a result, it will be important for legal firms to create awareness with and educate prospective clients on their expertise in order to drive new cases to their firm. This becomes even more critical when you consider the expected growth of 5% in the Personal Injury market.

HOW YOU HELP & EXPERIENCE HELPING OTHERS

We have a history of working with local firms to drive the results they need. My initial research into your practice leads me to believe we can do the same for you. I'd like to schedule a meeting with you to explore your growth goals and share a few ideas I have on how we can help drive more potential clients to you.

Finding VBR Insights

- Google is your friend!
 - Marketing Challenges
 - Consumer Trends
 - Consumer Journey
- Niche sites, industry websites, and publications
- Category Briefs
- Social Media



Securing the First Appointment

How many attempts do you make before giving up on a prospect?

- 1-3
- 4-6
- 7-9
- 9+



Don't Give Up Process

- Power of persistence with a purpose
- Importance of variety
- Creating a plan of approach
- Best practices



Don't Give Up. Be Persistent.

Average 7-9 attempts to connect

- Over a concentrated amount of time








The **stronger the VBR**, the fewer attempts needed

There is **no magic approach** or number of attempts

- Category of business
- Target Persona
- Unique factors



Don't Give Up! (Plan Your Approach)

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
		DAY 1: Introduction Email 	DAY 2: Follow-up Phone Call 	
DAY 4: Connect On LinkedIn 	DAY 5: Email Case Study 		DAY 7: Follow-up Video Message or Phone Call 	
		DAY 11: Final Phone Call 	DAY 12: Final Email 	

Don't Give Up



Final Email

Remember, the goal of the Don't Give Up Plan is to get a Target (prospect) to RESPOND.

I know you are busy, so I will be brief. Over the last 10 days, I've tried to connect with you via email, phone calls, and LinkedIn.

As I have mentioned in my previous attempts, we have experience driving results for businesses like yours. I have been so persistent in my attempts to connect with you because I am confident that we can drive similar results for your business, but your lack of response leads me to believe one of two scenarios

1. You have been extremely busy and haven't had the chance to respond, but you'd like to connect
2. You currently have all the business you can handle at this time

If the first scenario describes you, please hit reply and let me know if you are ready to connect now or if a later date fits better within your schedule for me to contact you. If I do not hear back from you, I will assume that you are not interested, and I will move on to another business that I can help.

Setting the Stage for a Successful Meeting

- Contracting and aligning expectations for the meeting
 - Logistics
 - Purpose
 - What won't happen
 - Who
 - Their expectations



Meeting Invite Template:

Hello <<NAME>>,

I look forward to meeting with you on <<DATE>> at <<TIME>> at <<LOCATION>>.

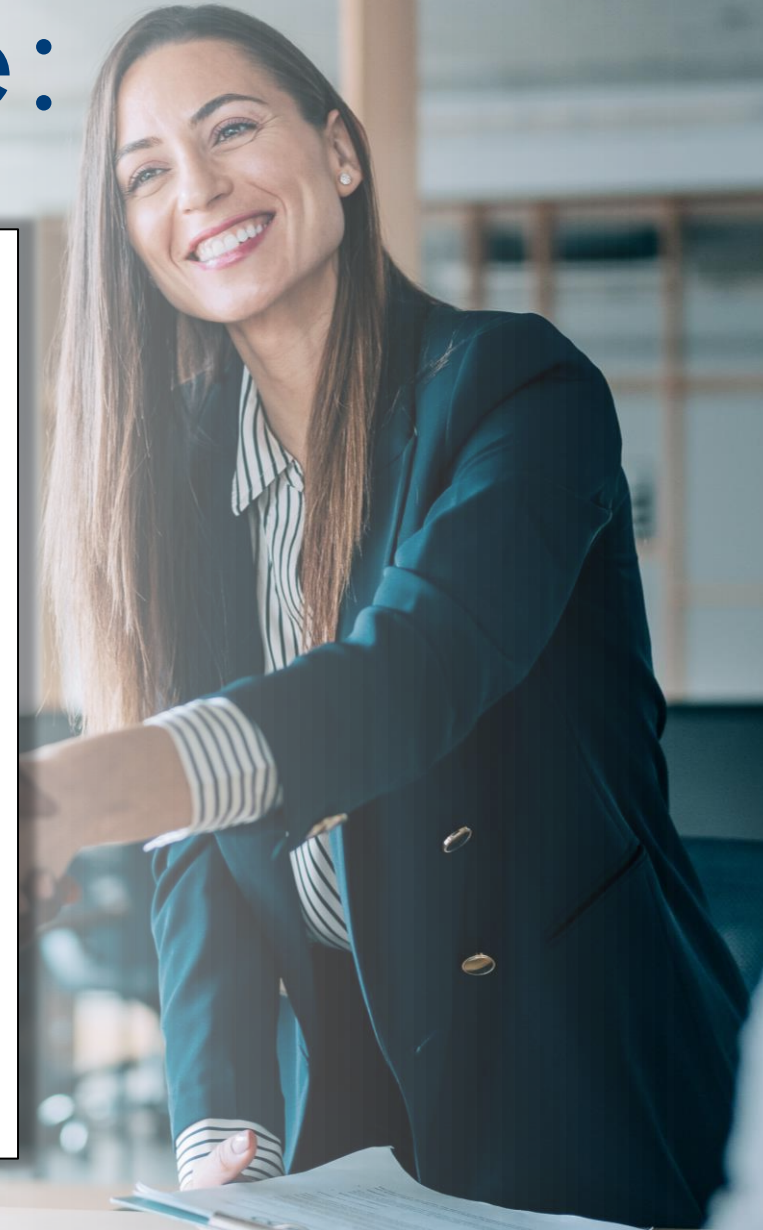
The purpose of our meeting will be:

- To focus on your business and the business results you need, not what I sell.
- I'll come prepared to ask plenty of questions.
- I will bring to our meeting <<CASE STUDIES, TESTIMONIALS, PRESENTATION OF CAPABILITIES>>
- The meeting should last <<TIME CONTRACTED>> minutes.
- I hope to walk away with an assignment (something I can help you with).

I believe it is important for you to know that I will not ask you to sign off on anything during this meeting.

I also want to make sure that we invite the right people to this meeting. From my organization it will be myself <<AND ANYONE ELSE THAT MIGHT BE ATTENDING.>> Please feel free to invite anyone you think would be appropriate to attend based on your internal decision-making process.

Let me know if there is anything else you would like to cover during this meeting.



A photograph of three business professionals in a modern office setting. A woman in a white blazer is seated at a desk, looking at a laptop. Two men in grey suits are leaning over her, smiling and looking at the screen. The background shows a window with blinds and a bright, airy atmosphere.

**What do you want to do to
TAKE ACTION**



QUESTIONS?
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