Quantum's Sales Blitz as a Service Best Practices Playbook

Overview

This playbook is designed to equip you with the best practices for achieving success with Quantum's Sales Blitz as a Service. To attain the most optimal outcomes and extract maximum ROI, the effectiveness of this program is hinged upon careful planning and enthusiastic participation from all involved parties.

Effective outbound lead generation revolves around a solid
lead list, a compelling message, and skillful delivery. Errors in any of these critical areas can lead to suboptimal results, undermining the potential success of the program.

First Blitz Preparation

Our objective is to kickstart the program with a resounding success during the initial blitz, creating a wave of enthusiasm and fostering active engagement from your team members. This sets the tone for the entire endeavor and fuels momentum for future initiatives.

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Target & Lists

Lead Lists

An accurate lead list is the bedrock of a successful outbound call campaign. It empowers your team to engage with the right prospects, deliver personalized messages, and drive positive business outcomes.

Data Sources

We strongly advise integrating warm leads into your call campaign strategy. These warm leads encompass prospects you've already engaged with through marketing efforts or previous calls. This category can also extend to existing customers who are ripe for upselling.

Our RevEfficiency model operates on a fundamental principle: prioritize optimizing opportunities within your existing customer base and the leads in closest proximity. It's about capitalizing on the potential within familiar territory before venturing into new waters. The overarching objective is revenue maximization, focusing efforts on prospects with higher odds of conversion, rather than expending resources on colder leads with lower chances of success.

REVENUE EFFICIENCY MODEL

When it comes net new lead lists, we'd like to understand whether you'll be supplying the net new leads or if Quantum will be responsible for furnishing these lists.

List of Lists

We recommend creating a comprehensive list of opportunities using our Revenue Efficiency Model by organizing them into categorized sub-lists. This approach ensures that you do not overlook crucial opportunities and provides a systematic way to assess and prioritize your options effectively.

Recommended Lists Include:

- **KEEP -** *Retain your current clients*
    - Current Clients
    - Setting Quarterly Business Reviews
    - Upcoming Lease End Dates

    - Surveys
    - Check-in Calls
- **GROW -** *Grow your existing customer base through Cross-Selling & Up-Selling*
    - Cross-Sell Services to Current Clients
    - Upsell to Current Clients
    - Re-Sell to Current Clients
    - Leads from Clients
- **MULTIPLY -** *Multiply your customer base through Referrals and Affiliated Programs*
    - Referrals
    - Former Customers Who Have Changed Jobs
    - Linked In Contacts
- **CONVERT -** *Win Business from your current customer base*
    - Former Client
    - Stalled Deals
    - Past Meetings - no Deal
    - Lost Deals
    - Past Deals
    - Marketing Qualified Leads
        - Form Submissions
        - Webinar Attendees
        - Webinar Registrants
        - Contact Us
    - Sales Qualified Leads
    - Leads that Haven't Been Contacted in the Last 30, 60, 90 Days, etc.
    - Open Deals
    - No Follow-up for 30/60/90 days
    - Website Visitor Leads
    - Trade Show Attendees
    - Follow-Ups
    - No-Shows
- **EXPAND**
    - Net New Clients
    - Net New Client with Specific Intent Topics
    - Target Accounts

- ICP Persona
- Buyer Personas
- ZoomInfo Intent Leads
- ZoomInfo Scoops Leads
- Leads Meeting Your Buyer Persona and ICP Criteria

Ideal Client Profile(ICP)& Buyer Personas

Whether you're furnishing the lead list or Quantum is sourcing the data, the utmost importance lies in having a well-defined Ideal Client Profile (ICP) and Buyer Personas. This clarity serves as a pivotal foundation for targeted and effective outreach.

Ideal Client Profile (ICP):

Your Ideal Client Profile (ICP) is a detailed description of the type of company or organization that aligns best with your products, services, and business goals. It's a blueprint of the ideal customer you want to attract and serve. Defining your ICP involves analyzing various factors such as industry, company size, geographic location, budget, challenges, and goals. By having a clear ICP, you're able to focus your efforts on targeting prospects who are more likely to benefit from your offerings and become long-term, high-value customers.

Buyer Personas:

Buyer Personas are fictional representations of your ideal customers. They go beyond demographics and delve into the motivations, needs, pain points, and behaviors that drive purchasing decisions. Buyer Personas are created by gathering insights from market research, customer interviews, and data analysis. Each persona represents a distinct segment of your target audience and helps you tailor your messaging and approach to resonate with their specific preferences and challenges.

Why ICP and Buyer Personas Matter:

1. Precision Targeting: Both ICP and Buyer Personas enable precise targeting. You're directing your efforts towards prospects who are most likely to have a genuine interest in your offerings, increasing the likelihood of conversion.
2. Relevance: When your outreach aligns with the needs and goals of your ICP and Buyer Personas, your messages are more relevant and engaging, fostering a stronger connection.
3. Efficiency: Instead of casting a wide net, focusing on ICP and Buyer Personas optimizes your resources, ensuring that your marketing and sales efforts are efficient and effective.
4. Personalization: By understanding the unique challenges and motivations of each persona, you can tailor your interactions to provide personalized solutions, demonstrating your understanding of their individual needs.
5. Consistency: ICP and Buyer Personas provide a consistent framework for your team's approach, helping everyone understand and target the same high-priority prospects.

In essence, having a well-defined ICP and well-developed Buyer Personas is akin to having a compass that guides your sales and marketing efforts in the right direction. They ensure that you're not just reaching out, but truly connecting with the right prospects in a meaningful way.

Lead List Format

Lead lists you are providing to Quantum should be submitted as a CSV file in the following template, which will be provided to you. If you are submitting lists for specific reps, we will need a separate file for each sales rep.

All files must come to us in CSV format											
Contact Lists						Company Lists					
First Name	Last Name	Company Name	Email	Title	Phone	Company Name	Company Domain if possible	Adresss	City	State	Country

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Messaging

Messaging / Training

Attached is a video message from Chris Beall, CEO of Connect and Sell that provides important insight on the type of messaging

Breakthrough Messaging with Chris Beall, CEO of Connect and Sell

https://vt.lightspeedvt.com/trainingCenter/course/187862/chapter/949373

Breakthrough Script - Framework

Phase 1, Version 1

PDF Version of this Template: https://hubs.ly/Q02HmHj30

Word Document Version: https://hubs.ly/Q02HmHh80

Tone: *Non-supplicative, confident without pushy…to be delivered authentically and with just enough of a stammer and a thoughtful grasping for words so it feels non-scripted. Deliver with slightly above a monotone hitting the emphasis on the highlighted words… (your status alignment will come from this tone). This is NOT to be delivered with overt enthusiasm).*

We should come across as:
1. "Pre-chasm" Thought leaders - we are Company name *…We passionately CARE about the entire client experience…from the pitch to the sale to the technology impact!*

2. Seasoned professionals - utilize deeper tones, slower pace, more 'banking and executive-like," and less small talk. ***Confident*** *but never cocky.*

3. Very collaborative in setting up any next steps or passing on "one-pager executive briefing documents" (Tier 2 leads) No neediness!

Pace*: Tease this with a slow and "careful" pace out of the gate and proceed faster with each paragraph until the "nurture" step when asking for the meeting. These are predominantly business owners, CEOs, COOs, CFOs, partners…so be aware of unnecessary modulation and be conscious of your attitude!*

Regions: Target Region

Additional Information: Have the website up in your browser for additional reference and soundbites.

Tip: You have 7 seconds to create trust on a cold call

Breakthrough Messaging:

Chris Beall Breakthrough Messaging Video

Breakthrough Messaging Framework

Greeting **Opener**	Hey, it's [Gregg Quisito] at [Celebration Marketing].
	[Contact Name], I **know** I'm an interruption; can I have **27 seconds** to tell you why I called? (Wait for response) Great, thanks.
Breakthrough **Value**	**I believe *we've discovered* a breakthrough** that increases rewards and loyalty enrollment members by leaps and bounds over traditional methods and will produce exponential ROAS.
Reason **Schedule**	**...the reason for my call is to get 15 minutes on your calendar to share this breakthrough with you...**
	...do you happen to have your calendar available?
Transition	Great, thanks.
	Let me give you an example...

Expansion	- For Shelby Ziga, Marketing Directorat [Texas Roadhouse - PHX, [Celebration Marketing] has been **agamechanger**! - We found we were able to increase their [Loyalty Membership by a factor of 10 with associated ROAS of $7.30:1], much more than everyone expected.
Redirection	**...I highly suspect sharing a few minutes with us can illuminate what this breakthrough would mean to you.**
	Are mornings or afternoons usually better for you?
Pushback **Redirect**	**We've learned the hard way that an ambush conversation like this is simply not a fair setting to talk about something this important to your business.**
Schedule	Are you more of a morning person or afternoon person?
Qualify	What's the best email to reach you at? Just to be sure our conversation on [Date and Time] is valuable for the both of us, I just gotta ask... How many...? and How do you...?

Response Matrix

Customer Response	**Transition**	**Expansion**	**Redirection**
Yes	- (Smile and chuckle) Fantastic!	- Let's take a look (at our calendars)...	- how does [date and time] or even [date and time] look?
No (may or may not have it)	- (Smile and chuckle) No problem...	- I can take care of that for us, I have my calendar here...	- Are mornings or afternoons usually better for you?

	- I can wait for you to get it... (HOLD)	- I'll find some time for us in a couple of weeks...	
Not Me (may or may not be the right person)	- Aw, thanks for letting me know... - (Ha) I definitely want to be speaking with the right person...	- I have that you're the [Title]? (wait for a yes or no) Got it. - We	
Not Now (all set; no need; not looking)			
What is the breakthrough?	- (Smile and chuckle), well... - Let me give you an example...	- For [Customer Contact Name], the [Title] at [Customer Company Name], [Your Company Name] has been **agamechanger**! - We found we were able to increase their [ABC - by a factor of # or %], a lot more than we expected. - If I recall, it could have been as much as [$___ in uplift].	- I highly suspect spending a few minutes with us can clarify what this breakthrough would mean to you. - Are mornings or afternoons usually better for you?
Send me information...			

Breakdown of Breakthrough Messaging Framework

	What to Say	How and Why to Say It
Greeting	"Hey, this is [Your Name] from [Your Company Name]."	Start casual and friendly - like you know them. Don't try to be invasive. Come right out with your name and company. Your initial honesty will be rewarded.
Opener	"I know I'm an interruption;" "can I have 27 seconds" "to tell you why I called?"	**Pattern Interrupt**: Take personal responsibility for being an interruption, don't apologize, own it - it's a shared truth that is hard to disagree with. Demonstrate that you see the world through their eyes, but that you have a competent solution to the problem they are facing in that moment - that the problem is YOU. **Upfront Contract**: Switch to a playful (chuckle) and curious voice when asking for 27 seconds.
Breakthrough Value	"I believe" "we have discovered" "a breakthrough"	"I believe" is an arresting statement of fact. When someone else expresses a simple belief, we need to hear the punch line. "You believe what?" "we have discovered" says clearly that whatever "I believe" was not cooked up for the purpose of making a buck; it is something true that has simply been found out. And not just by one person, but by "we," who are less likely to be mistaken. "a breakthrough" goes out on a limb, promising not just incremental or temporary value, but potentially something game-changing. Move the prospect to a more

	"[WIIFM]" Economic, Emotional, and Strategic Value	curious state. A "What's In It For Me" (WIIFM) statement resolves the question of "what is the breakthrough?" by simply and clearly stating the nature of the breakthrough. If you are responsible in any way, a claimed breakthrough of this kind is worth learning more about. The WIIFM statement should have economic, emotional, and strategic value components. Avoid how/why/what and any industry or category words.
Reason	"The reason I called is to get 15 minutes on your calendar to share this breakthrough with you."	You've been given 27 seconds to say why you called. In this sentence, you keep your promise. In well under 27 seconds, the purpose of your call is clearly stated: you'd like a brief, scheduled meeting to share this important breakthrough. Everything about your purpose for calling is laid out clearly, directly, and respectfully.
Schedule	"Do you happen to have your calendar available?"	Your purpose is clear, you simply ask whether the means - the prospect's calendar - are available to take the next obvious step: to set a date and time for a 15-minute conversation for the purpose of learning more about the breakthrough.

After You Ask for Their Calendar

Once you ask, “do you happen to have your calendar available?” ...in most cases, you will hear the prospect pause as they consider their calendar and when they might have time to speak to you. This means you win! It is critical that the prospect speaks next. Bite your tongue. Be silent and wait for it... keep waiting... only the prospect should break the silence! If they say **YES**, work with them to find a time that works best for the both of you.
However, often the prospect’s defense mechanism will kick in and they may ask you a question: “What is the breakthrough?” “Who are you?” “What is this about?” When the prospect asks for more information, remember **IT’S A TRAP**. They are trying to get you to say something they can use to quickly categorize you and decide they don’t need to talk to you. Depending on how you answer the question they often say “We are all set, thanks.” You must **avoid industry / technical / category language at all costs**. You have aroused their curiosity and you must ensure the only way they can satisfy that is to accept the invitation and show up for the meeting.

	What to Say	How and Why to Say It
Redirect	We’ve learned the hard way that an ambush conversation like this is simply not a fair setting to talk about something this important to your business. Are you a morning person? How does Tues or Wed look?	Since cold calls are an ambush, you most likely do not have their undivided attention. Keeping in mind you have delivered on the 27 secs, you can redirect them to the purpose of this call, “to get 15 mins to share this breakthrough.'' For them to grasp the value and implications of the breakthrough, a scheduled call is a fairer and more productive setting.
Expansion	For [Customer Contact Name] at [Customer Company Name],[Your Company Name] has been - a - game - changer! We found we were able to increase their [ABC - by a factor of # or %] - a lot more than we expected. If I recollect, it could have been as much as [$___ in uplift]. I highly suspect spending a few mins with us can clarify what this	This is a statement you can use when the prospect says "tell me more" after you’ve asked "Do you happen to have your calendar available". The recommendation is that this expansion statement leverages a protagonist in a story that expands on the "what's in it for them" component. This helps you avoid product talk, who we are, what we do, insert

	breakthrough would mean to you. Are mornings or afternoons usually better for you?	marketing category language, etc.
Qualify	What's the best email to reach you at? Just to be sure our conversation on [Date and Time]is valuable for the both of us, I just gotta ask... How many...? and How do you...?	If necessary, ask 2-3 specific questions which answers will enhance the value of the scheduled meeting. Stay away from Qs that require homework, or elicit answers that can be learned through publicly available information.

Expansion Examples
1) Daffy Duck at XYV - ABC Co has been a - game - changer! We found that we could increase his reimbursement revenue generated from auto/liability claims - by 5x - a lot more than we expected. It could have been as much as $4M- $5M in uplift... I strongly suspect that us spending 15min together will clarify what this breakthrough might mean for you. 2) "I don't know what the secret sauce is that makes it work. All I know is that it's changed my life. As I'm sure you know, cold calling senior executives such as yourself is tough, and I know a lot of people that give up and just send emails and hope for a response. Me - I get to push a button and have 30 or 40 conversations like this every day. It's the biggest game changer I've ever seen - not like anything else out there. It's not for everybody - you've got to be good at having conversations - but from my experience it's definitely worth 15 minutes to learn more." 3) "Dr. Fifi at ABC Company was frustrated by significant delays in time-to-treatment despite years of research and optimizing stroke protocols. After working with [Customer Name], outcomes improved by 50%. I'm sure the conversation with [Customer Name] will be worth your time." 4) "I don't know the secret sauce. I can tell you that for Theresa Slack at XYZ company, she was about to give up on her business, but after working with [Customer Name] she was just awarded 2020 Firm of the Year! I strongly suspect that a 15 minutes conversation will clarify what the breakthrough might mean for you." 5) "We know your most important patients are not techies and this means they struggle to engage with you so you can provide the care they need. It's also a breakthrough way to grow your practice at a fraction of the cost of a medical grade solution."

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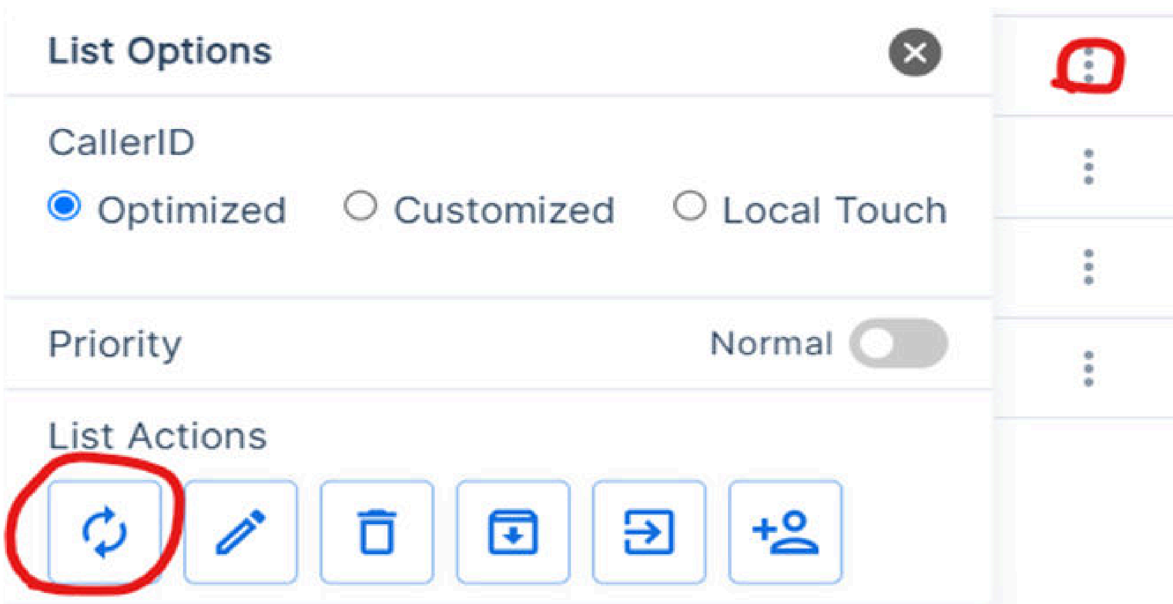
Rep Performance

PREPARATION for Reps: Day Prior to Calling

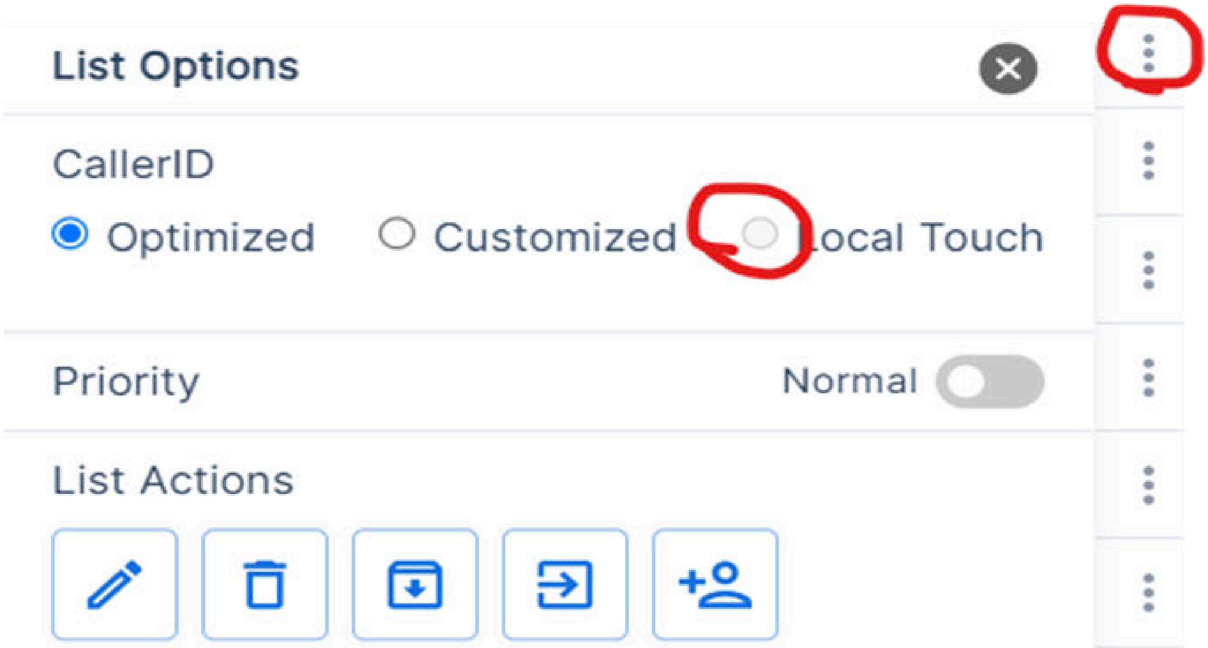
1. Review your lists to know what persona you will be speaking with.
2. Review script/screenplay to familiarize yourself with what you will say.
3. Roleplay/Practice script with a co-worker/manager. Practice, practice, practice until it feels natural.

CALLING DAY

1. Always access Connect and Sell through Google Chrome browser.
2. Access Google Chrome in 'INCOGNITO' mode by clicking on the 3 dots located in the top right corner of your screen – select "New Incognito Window."
3. Once signed onto Connect and Sell, refresh your lists. You do this by clicking on the 3 dots located on the right side of your screen next to the list you will be working. Hit the button with the 2 swirling arrows in the 'List Actions'.



4. Once the lists are refreshed, change your Caller ID to 'Local Touch'. This will show a local number that you will be calling from.



List Prioritization

For each blitz day, it is crucial for your sales reps to adopt a strategic approach to maximize their opportunities. Here's how they should prioritize their calls.

Start with No Shows and Follow-Ups

Sales reps should kick off their calling sessions by prioritizing No Shows and Follow-Ups if there are callable targets in these lists. These are contacts who have previously engaged and have explicitly expressed interest in meeting or being contacted again later. Notably, they have already demonstrated their responsiveness (picker-uppers) and are statistically 50% more likely to accept a meeting compared to other call categories.

Manager-Assigned Lists

Next in line are lists specifically assigned by their respective managers for the day's blitz. Reps should diligently work through these lists, adhering to any specific instructions provided by their managers. This ensures that we address high-priority leads and opportunities as directed by your leadership.

Strategic List Selection

In the absence of explicit directions, reps should prioritize calling lists that hold the highest likelihood of conversion. This includes identifying upsell opportunities among existing customers and focusing on leads that have been nurtured and warmed up through marketing efforts. By targeting leads that are more likely to convert, we can make the most efficient use of calling time.

By following this prioritization strategy, sales reps can make the most of their blitz days, optimizing their efforts for higher engagement, conversion rates, and ultimately, success in building your sales pipeline.

Call Dispositions Overview:

In Connect and Sell, call dispositions refer to the categorization and labeling of the outcomes of sales or prospecting calls. Each call is assigned a disposition to document what happened during the call, such as whether it was a successful connection, a voicemail, a not interested response, a follow-up required, and so on.

The importance of appropriately dispositioning calls in Connect and Sell cannot be overstated. Here are key reasons why it's crucial:

- Tracking Progress: Dispositions help sales teams track their progress and performance over time. By categorizing calls accurately, you can measure metrics like conversion rates, response rates, and success rates.
- Segmentation: Properly labeled dispositions enable you to segment your leads and prospects effectively. This segmentation can inform your follow-up strategy, ensuring that you tailor your messaging to the specific needs and interests of each group.
- Personalization: Call dispositions provide valuable insights into a prospect's objections, interests, or concerns. This information is vital for crafting highly personalized follow-up emails and messages that address their specific pain points.
- Lead Nurturing: By dispositioning calls appropriately, you can identify warm leads that require immediate follow-up and prioritize them over colder leads. This ensures that your team focuses its efforts on leads more likely to convert.
- Feedback Loop: Dispositions facilitate a feedback loop between the sales team and the marketing team. Marketing can use disposition data to refine lead generation strategies, content, and messaging to better resonate with prospects.
- Compliance and Reporting: Accurate call dispositions are essential for regulatory compliance, especially in industries with strict calling regulations. They also provide a foundation for generating meaningful reports and analytics.
- Sales Forecasting: Disposition data plays a role in sales forecasting, helping organizations project future revenue and set realistic sales goals based on historical call outcomes.
- Efficiency: When calls are dispositioned correctly, sales reps can quickly identify the next steps required for each lead, streamlining their workflow and improving productivity.

In summary, call dispositions in Connect and Sell serve as a critical tool for managing and optimizing the sales process. They enable sales teams to track progress, personalize outreach, prioritize leads, and maintain compliance. By consistently and accurately dispositioning calls, you can improve your follow-up strategies and increase the likelihood of converting leads into customers.

Sales Reps require comprehensive training to ensure the accurate marking of custom call dispositions, thereby enhancing the precision of future interactions. Equally vital is preventing the improper labeling of calls as "Do Not Call," which could inadvertently exclude viable leads from further engagement. Additionally, it is imperative to conduct regular reporting reviews to identify and address instances where specific reps disproportionately apply disqualifying dispositions. For such individuals, personalized training may be necessary.

Custom call dispositions can be configured in both ConnectandSell and HubSpot, unlocking the potential for automated sequences and workflows based on these dispositions.

Select Appropriate Call Dispositions

Select the correct disposition when the call is completed by using the attached reference table. This should be kept in sight while dialing.

Disposition	Definition	Type	Meeting	Follow-Up	Contact Status	Count as Conversation	Real Time Conversion Alert	What happens to contact?
Blocked by Gatekeeper	If you didn't get through to the decision maker.	Neutral		Required	Follow-up	No		Stays in the active list
Busy, Call back later	Contact was busy and suggested you call back to reach them at a better time.	Neutral		Required	Follow-Up	Yes		moves to follow-up list
Busy, Send Information	Contact was busy and requested information be sent. No Interest was expressed	Neutral		Required	Follow-Up	Yes		moves to follow-up list
Disqualified, Reason in notes	Contact and their company are not a part of ICP, says never contact me again, or take me/us off your list.	Negative			Disqualified	Yes		Deletes contact from contacts only
Do Not Call	Contact says they want to be taken off list, but the company may still be a fit.	Negative			Do Not Call	Yes		Deletes contact from contacts only
Incorrect Contact	The person on the phone was not who they were supposed to be	Negative			Incorrect Contact	Yes		Deletes contact from contacts only
Interest, Call back later	Contact has a need or interest in product/service but is not in the buying stage of cycle and says to call back at a certain point	Positive		Required	Follow-Up	Yes		moves to follow-up list
Interest, Send Info	Contact was interested and wants more information before committing to a meeting	Positive		Required	Follow-Up	Yes		moves to follow-up list
Meeting Rescheduled	Initial meeting was a no show and we got them back on the books	Positive	Yes		Meeting Set	Yes	Yes	Deletes contact from Contact and the Company
Meeting Scheduled	Contact agreed to a meeting with the client	Positive	Yes		Meeting Set	Yes	Yes	Deletes contact from Contact and the Company
No Longer with Company	This person is not with the company anymore	Negative			No Longer with Company	Yes		Deletes contact from contacts only
No Pitch	The prospect answered and pitch was started and not given	Neutral		Required	CAS Prospect	Yes		Stays in the active list
Not Decision Maker	Contact was not the correct person at company to decide on the product/service offered	Negative			Not Decision Maker	Yes		Deletes contact from contacts only
Not Interested – Follow Up	This is someone who says they're not interested but we need to follow up with them	Neutral		Required	Follow-Up	Yes		moves to follow-up list
Quick Hang Up	No one on the other line, the pitch wasn't started.	Neutral			CAS Follow-up	No		Stays in the active list
Referral	The prospect was not the decision maker and referred you to a colleague	Positive		Required	CAS Gave Referral	Yes		Deletes contact from contacts only

Call Disposition Standards:

Conversion Rate:

Over 5% Pass

3 - 5% Neutral

Under 3% Fail

Meeting No Show Rate:

65% + Pass

50 - 59% Neutral

Under 50% Fail

D2C: Dial to Contact:

1 - 10 Pass

11 - 20 Neutral

Over 20 Fail

D2M: Dial to Meeting:

> 400 Pass

400 - 700 Neutral

Over 700 Fail

Meetings per Hour:

GT 0.41 Pass

0.25 - 0.40 Neutral

Under 0.25 Fail

Disposition Outcomes:

Do NOT Call: never exceed 5%

Disqualified: never exceed 5%

Quick Hang-up never exceed 10%

No Pitch: never exceed 10%

Wrap Time Average:

30 - 45 sec p/conversation	Pass
45 - 60 sec p/conversation	Neutral
>60 sec p/conversation	Fail

Common Custom Questions

Listed below are samples of Customer Questions that can be used to gather information from your prospects when calling on the dialer

- Who is in the Buying Role?
- Who is your current IT provider?
- Do you outsource your IT services or support?
- Competitive Copier Lease Expiration Date?
- Are your copiers owned or leased?
- Who services your copiers and printers?
- Type of copiers/printers?

Post Meeting Follow-up Best Practices

Effective follow-up after a sales meeting is a cornerstone of successful sales strategies. It's the bridge that transforms promising discussions into closed deals and long-term customer relationships. In this guide, we present a comprehensive list of best practices for post-sales meeting follow-up. These strategies not only ensure that prospects remain engaged throughout the sales cycle but also demonstrate your commitment to solving their challenges and meeting their needs. By implementing these practices, your sales team can build stronger client relationships, increase conversion rates, and drive business growth.

1. Prompt Thank-You: Send a personalized thank-you email immediately after the sales meeting to express appreciation for the prospect's time and reiterate key takeaways.
2. Meeting Recap: Provide a concise summary of the meeting's discussions, highlighting pain points, solutions, and action items, and share it with the prospect.
3. Follow-Up Timeline: Establish a clear follow-up timeline, including specific dates for next steps, follow-up calls, and additional meetings, and communicate this timeline with the prospect.
4. Personalized Content: Tailor follow-up materials and content to address the prospect's unique needs and challenges, demonstrating a commitment to solving their problems.

5. Joint Sales and Marketing Efforts: Collaborate closely with the marketing team to ensure a seamless transition from marketing-generated leads to sales engagement post-meeting. Use marketing-approved content and resources to reinforce key messages and educate prospects further.
6. Active Lists and Reporting: Maintain active lists and reporting to identify contacts who have had a meeting but have not been contacted in 30, 60, or 90 days. Regularly review and update these lists to prevent leads from falling through the cracks.
7. Automated Nurturing Sequences: Implement automated nurturing sequences for prospects who are not ready to move forward immediately. These sequences can include follow-up emails, relevant content, and reminders for scheduled touchpoints.
8. Personalized Touchpoints: Make personal follow-up calls, emails, or messages at agreed-upon intervals to keep the prospect engaged. Address any questions or concerns raised during the sales meeting promptly.
9. Value Delivery: Continuously provide value to the prospect by sharing industry insights, relevant case studies, or success stories that align with their interests.
10. Feedback Loop: Gather feedback from the prospect regarding their experience and any additional information or resources they may require. Use this feedback to refine your approach and customize your follow-up efforts.
11. Regular Updates: Keep the prospect informed about any developments, updates, or new offerings that may be relevant to their needs. Share relevant news or industry trends that showcase your expertise.
12. Personalized Proposals: If applicable, create customized proposals or quotes that address the specific solutions discussed in the meeting. Ensure timely delivery and follow-up regarding proposal acceptance.
13. Scheduled Check-Ins: Schedule regular check-in calls or meetings to maintain an ongoing dialogue and build a strong relationship with the prospect.
14. Documentation and CRM Updates: Maintain detailed records of all interactions and update the CRM system with the latest information, ensuring data accuracy.
15. Continual Assessment: Continually assess the prospect's engagement level and adjust your follow-up strategy accordingly. Identify potential obstacles or objections and proactively address them.

By following these best practices, sales reps can nurture prospects effectively, maintain engagement throughout the sales cycle, and increase the likelihood of successful conversions. This approach helps build stronger client relationships and ensures a more seamless transition from initial contact to closing the deal.

Boost Show Rates and Handle No-Shows

Learn effective strategies to boost your show rate for meetings and appointments.

HOW TO BUMP YOUR SHOW RATE

- Within 24 hours of the meeting being set, request to connect on LinkedIn.
- 2 days before the meeting, send a 3rd-Party educational piece.
- The night before, or the morning of the meeting, place a reminder call.

IF YOU HAVE A NO-SHOW

- At the 3-minute mark, reply to the invite, and ask if it is still a good time to meet. Inform the contact that the bridge is set up.
- At the 7-minute mark, go ahead and give the contact a call.
- If you still get no response, send an updated invite for the following day at the same time, or for the next week, on the same day of the week, at the same time. Reference that this seemed to be a good time for the contact to meet so you are hoping this works for them. Include your meeting link in case they need to select an alternative meeting time.

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Automated Meeting Reminders

Utilize an automated reminders to ensure attendees receive timely notifications about the upcoming meeting, enhancing their preparedness and punctuality.

Provide Insightful Pre-Meeting Email:

Send a concise and informative email detailing what participants can anticipate during the meeting. This summary not only sets clear expectations but also primes attendees for a productive and focused discussion, enhancing the overall meeting experience.

10 Common Mistakes of Sales Follow-ups

Following up on sales calls effectively is crucial for converting leads into customers. Here are the top 10 mistakes people often make when following up on sales calls:

1. **Lack of Timeliness**: Waiting too long to follow up can result in lost opportunities. Follow up promptly to keep the conversation fresh.

2. **Being Too Pushy**: Being overly aggressive can turn potential customers away. It's important to balance persistence with respect for the prospect's time and decision-making process.

3. **Not Personalizing the Follow-Up**: Sending generic follow-up messages can make prospects feel undervalued. Personalize your follow-up to show that you remember their specific needs and concerns.

4. **Failing to Provide Value**: Simply asking if they've made a decision isn't enough. Provide additional value in your follow-up, such as answering questions, offering new insights, or sharing relevant resources.

5. **Ignoring Multiple Channels**: Relying solely on one communication channel (e.g., email) can be limiting. Use a mix of channels such as phone calls, emails, social media, and even handwritten notes.

6. **Not Tracking Follow-Ups**: Without a system to track your follow-up efforts, it's easy to lose track of where each prospect is in the sales process. Use a CRM or other tracking tools.

7. **Forgetting to Confirm Details**: Confirming key details and next steps ensures clarity and helps avoid misunderstandings. Make sure both parties are on the same page.

8. **Neglecting to Address Objections**: If prospects have concerns or objections, address them head-on rather than ignoring them. This builds trust and can help move the sale forward.

9. **Lack of Consistency**: Inconsistent follow-up can make you appear unreliable. Establish a follow-up schedule and stick to it to build trust and show commitment.

10. **Not Asking for Feedback**: Feedback from prospects can provide valuable insights into how you can improve your approach. Don’t be afraid to ask how you can better meet their needs.

By avoiding these common mistakes, you can improve your follow-up strategy and increase your chances of closing sales.

Quality Assurance and Coaching

Quality Assurance

Calls should undergo regular review for training purposes and to provide feedback. The following scorecard can be utilized for this process:

Cold Call Quality Assurance Scorecard		
Put a Yes or No Checkmark response for each question.		
Add Up Total Checkmarcks for Yes or No to Determine the effectiveness of the call.		
	Yes	**No**
Intro: Did I clearly use the prospect's name and identify myself and my company?		
Mirror: Did I match my tone, pace, and rhythm to the prospect?		
Did I effectively execute the up-front contract?		
Pitch: Did I paint a clear picture of what we do?		
Did I identify problems and benefits in the pitch regarding the prospect's world?		
Close: Did I effectively go for the close?		
Did I clearly suggest a data and time for the appointment?		
Did I ask if they have their calendar available?		
Did I ask two or more qualifying questions?		
Did I use the required wrap-up?		
	Yes	**No**
Total		

+

Quantum Business
Helping Your Organization Make the Leap

Expectations and Commitments

Client Commitments

Sales Rep Accountability and Remaining in the Seat are pivotal factors for the success of the Sales Blitz as a Service program. To ensure the program's effectiveness, we have outlined several essential guidelines.

1. Consistent Sales Training: Implement a robust Sales Training Cadence, ensuring your sales representatives are equipped with the latest skills and knowledge.
2. Diligent Calling Commitment: Each sales rep should commit to dedicating a minimum of X hours per week to proactive dialing, maximizing outreach efforts, and ensuring consistent engagement with clients and potential clients.
3. Accountability Standards: Hold the entire team accountable to the established expectations of a Sales Rep, ensuring a high standard of professionalism and performance across the board.
4. Pre-Blitz Preparation: Sales Reps should confirm their prospect lists a day before each blitz, ensuring thorough preparation and enhancing the quality of interactions during the blitz sessions.
5. Messaging Discipline: Maintain discipline in adhering to the designated messaging, ensuring consistency and clarity in communication with clients, thereby reinforcing your brand identity and message.
6. Optimizing Show Rates: Follow best practices for improving show rates, and implementing effective strategies to increase attendance and participation during scheduled meetings and presentations.

Sales Rep Expectations:

Your organization is committed to a substantial investment in this program, offering your team members an exceptional opportunity to accelerate their sales pipeline development compared to traditional dialing methods. To maximize the value of this initiative, it's essential that sales reps have a well-defined and transparent set of expectations that cover activity levels, results, and behaviors. These expectations are designed to provide clarity regarding their roles within this program and to ensure its success. These expectations should include:

Activity Levels

Call Volume: Sales reps should be available for calls for at least 80% of dedicated blitz time. This metric ensures that reps maintain an active and consistent presence to maximize the opportunity.

Meetings: As a baseline standard, sales reps following best practices should be able to book .5 meetings per hour based (will vary based on skill level, quality of lists, calling on cold leads vs. warmed-up prospects or current customers, etc.).

Results

Sales Targets: Clearly articulate the revenue or sales targets that reps are responsible for achieving. This should include both short-term and long-term goals, allowing reps to measure their progress and impact on the company's bottom line.

Conversion Rates: Define the expected conversion rates at each stage of the sales funnel, such as lead to opportunity, opportunity to closed deal, etc. This helps reps understand where they should focus their efforts for maximum impact.

Sales Cycle Duration: Set expectations for the average duration of a sales cycle, helping reps gauge how efficiently they are moving leads through the pipeline.

Behaviors

Customer Engagement: Outline the desired behaviors during customer interactions, emphasizing professionalism, active listening, and providing value to leads and customers.

Follow-Up: Specify the timely follow-up and persistence expected from reps, ensuring that no lead or opportunity falls through the cracks.

CRM Usage: Encourage consistent and accurate use of the CRM system for lead management, data entry, and activity tracking.

Continuous Learning: Promote ongoing learning and skill development through training, workshops, or courses, fostering a culture of continuous improvement.

These expectations should be communicated clearly, regularly reviewed, and adjusted as needed to reflect changing business objectives and market conditions. By providing sales reps with a well-defined roadmap, they can work more effectively toward achieving their targets, driving revenue growth, and contributing to the overall success of the organization.

Additional Resources

Connect and Sell Reference Videos & Materials

You can access the Connect and Sell video library for both leaders and users through the following links. In these videos, you'll discover valuable insights on maximizing the platform's capabilities, accessing and reviewing reports, and much more.

User Library

Leader Library

Chris Beall - Breakthrough Messaging