

The Breakthrough Mindset

Every client is Your Client...
some just don't know it yet!

Everyone you wish to do
business with is a "client."

Assume you will win
every qualified client.

What this tool does for you.

Drives new business by

- Structuring an easy, quick process for moving from generating a list of potential clients to following up on your first, breakthrough meeting.
- Managing common barriers to opening new accounts including
 - Call reluctance
 - Competing priorities
- Ensuring you promise and deliver differentiated value to your client at every touchpoint
- Replacing "cold calls" with initial meetings that generate breakthrough opportunities for you and the client
- Focusing you on listening and developing a deep knowledge of your client and their challenges

When to use:

- When you are developing your new potential clients.
- To help prepare and conduct each and every first call.
- To help ensure selling based on client needs rather than available products.
- To help summarize the results of each and every first call.

Contents:

- Breakthrough Call Process
- Breakthrough Call Tools
- Breakthrough Sales Checklist
- Sample introductory letters
 - Guidelines
 - Sample Letter 1
 - Sample Letter 2
- The first telephone contact script
- Initial meeting techniques
 - Opening a meeting: Setting expectations with the client
 - Changing client behavior: Getting them to ask for the sale
- Initial meeting summary & evaluation sheet
- Post call letter outline

Where to get additional help or support:

Visit www.FlanaganConsultants.com or email
Leo_Flanagan@FlanaganConsultants.com

STAGE 1 Generate a list of potential clients Tool 1	STAGE 2 Send out introductory letter, focusing on client's industry Tool 2	STAGE 3 Make the initial contact Tool 3	STAGE 4 Generate initial meeting Tool 4, 5, 6
<p>Establish a list of potential clients with your sales leader. In certain markets the wider the initial 'net', the more likely the number of 'catches.'</p> <p>The following resources may help you generate your list:</p> <ul style="list-style-type: none"> • Discussions with your sales leader. • Current clients who can refer you. • The potential client's web site: <ul style="list-style-type: none"> - Annual Report - A letter from the Chairman/CEO - Financial results - Press releases - Vision and value statements - Executive names & backgrounds • Conversations with product/service specialists in your company • Automated searches of key business periodicals and newspapers <ul style="list-style-type: none"> - E.g. <i>The Financial Times</i>, <i>The New York Times</i>, <i>The Wall Street Journal</i> • Hoover's <ul style="list-style-type: none"> - An online business research service • Research provided by your own investment advisor (e.g. Charles Schwab, Fidelity, etc.) <ul style="list-style-type: none"> - Major investment firms provide online research for modest or zero fees • Your competitors website will identify their clients and their target markets 	<p>Send out an introductory letter focusing on the client's industry or a specific product or service.</p> <p>See Tool 2 for format and tone; follow these guidelines:</p> <ul style="list-style-type: none"> • Keep it short but demonstrate your knowledge about the Client's business. • Set the expectation that you can expand on customer loyalty and will expand on your expertise during the follow up phone call. • Produce on company letterhead. • Customize for each product/service offering. • When providing detail on specific products, have your draft reviewed by a product/service expert for accuracy. 	<p>Make the initial contact with each of the potential clients.</p> <ul style="list-style-type: none"> • Start the calls 5 days after the letters are mailed. • Place calls between 7:00 and 8:30 a.m. when the assistant or secretary is less likely to be in and intercept. • Make all your calls in a concentrated period (better use of your time and energy). • Don't take a break between calls – keep calling for a solid hour. • See Tool 3 for a "script," though adjust the words to your style. <ul style="list-style-type: none"> - If you get through to voicemail – still use the script and end by leaving your name, phone, and the next time you will call back. - If you get an assistant or secretary – follow that portion of the draft script • "Pull" the sale by targeting business needs rather than "pushing" your product/service. <ul style="list-style-type: none"> - Use questioning rather than presentation. 	<p>Prepare for your initial meeting.</p> <ul style="list-style-type: none"> • Make sure you've done your research – Web, 10-K, Annual Report, etc. • Prepare your interview outline/script. • Consider using these two techniques: <ol style="list-style-type: none"> 1. Opening A Meeting: Questioning technique (Tool 4.1). 2. Changing Client Behavior: Getting them to ask for the sale (Tool 4.2). • Preparation – consider the merits of working alone or with a colleague. <ul style="list-style-type: none"> - If you are partnering – prepare together to ensure a consistent message, and make sure the client expects to see both of you. • Meet with the client and follow your interview outline/script. • Complete the Initial Meeting Summary & Evaluation (Tool 5) Debrief the call. • Immediately send the Post Call letter (Tool 6). • Ensure you have the time and resources to accomplish the follow-up commitments you've made to the client.

<ul style="list-style-type: none"> <input type="checkbox"/> Identify a list of potential clients (# defined by you and your Sales Leader) <input type="checkbox"/> Research each potential client's financial reports and business strategies to determine: <ul style="list-style-type: none"> • Business strategy (see <i>RBR Selling to Your Client's Business Strategy Tool</i> for more detail) • Core products & services • Size, e.g. <ul style="list-style-type: none"> - Revenue/profit - Number of employees - Locations/countries doing business in • Key executives • Stock price and trends • Recent press releases To conduct the research again rely on: <ul style="list-style-type: none"> • Potential client's website • Hoovers • Your investment advisor's research <input type="checkbox"/> Check that they are not existing clients within your company <input type="checkbox"/> Send out an introductory letter focusing on the clients industry and/or a specific product or service for each potential client <input type="checkbox"/> Place the call to each of the potential clients <ul style="list-style-type: none"> • Follow script on each call <input type="checkbox"/> Send the Post Call letter 	<ul style="list-style-type: none"> <input type="checkbox"/> Replenish your list of potential clients to account for any rejections <input type="checkbox"/> Prepare for initial meeting: <ul style="list-style-type: none"> • Research client industry/business • Prepare interview outline/script • Decide whether to make the meeting alone or with a colleague <input type="checkbox"/> Meet with the client <ul style="list-style-type: none"> • Follow the interview outline/script • Complete Initial Meeting & Summary <input type="checkbox"/> Send the Post Meeting letter <input type="checkbox"/> Confirm the time and resources to accomplish the follow-up commitments made to the client <input type="checkbox"/> Start this process again at Step1 to continue building new prospects.
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Guidelines:

- ▶ Succinct
 - Less than a page
 - Crisp
- ▶ Provocative
 - Politely question whether what the potential client is doing is effective (see Sample Letter 1 on page 5)
 - Points out the effective actions others are taking (see Sample Letter 2 on page 6)
 - Potential clients will assume you are talking about competitors
- ▶ Build credibility
- ▶ Focus on the results you can achieve
 - Focus on a specific opportunity
 - e.g. Improving the potential client's marketing strategy (see Letter 1 on page 5)
 - e.g. Driving business performance through HR (see Letter 2 on page 6)
 - Don't focus on specific products or services in this letter
 - Provide quantifiable results where possible
 - Financial
 - Market share
 - Customer loyalty
- ▶ Strike a positive, confident tone
 - Write as if you assume that you will partner together
 - Use phrases like
 - "When we have the opportunity to work together"
 - "In partnership we can"
 - Don't use phrases like
 - "If you can find the time . . ."
 - "If you agree to work with us . . ."
- ▶ Individualized
 - Individually addressed
 - Use a formal greeting
 - i.e. "Dear Mr. _____"; "Dear Ms. _____", or "Dear Dr. _____"
 - Incorporate the potential client's company name into the letter where possible

Marketing Company Selling To Regional Financial Services Institutions

October 24, 2002

Potential Client's Name

Title

Company

Address

Dear (Insert Client Name):

Consumer and business owner concerns over the state of our economy provide you with unique opportunities. You have opportunities to gain market share and revenue by providing solutions for clients to move forward despite current uncertainties. As one of our strongest regional financial service firms we invite you to ask a crucial question.

Does your current marketing strategy effectively create demand for the unique solutions and expertise you offer to consumers and businesses?

Universal Marketing shares (insert Company)'s understanding of our local economy and business conditions. Like (insert Company) we've successfully helped local and regional businesses capture business opportunities for over 15 years. We've worked with leaders such as you to use strategic marketing to achieve targeted business objectives. We help organizations stay focused on getting real business results regardless of current conditions. Typically, even under the worst of market conditions, the implementation of our strategies produces between 10% and 15% increased revenue.

I will call you for an initial discussion of how we can partner together on (Insert DATE and TIME). I'm confident that Universal Marketing can work with you to seize the results that others are missing.

Very truly yours,

Maureen E. Meehan
Senior Account Executive

Strategy Implementation Firm Selling To HR Executive

October 24, 2002

Client's Name

Title

Company

Address

Dear: (Insert Client Name)

We're experiencing one of the most challenging business environments in decades. Many businesses have had to reduce spending and resources to meet short-term constraints. Often these reductions are acutely felt in Human Resources. Yet you and I both know that it's the company that is best led, staffed, and trained that will show the most dramatic business results when business conditions shift.

At Flanagan Consultants, LLC our most valued clients are working with us to make sure that their Human Resources are focused, prepared, and motivated to take advantage of every opportunity in today's tough environment – and too rapidly take the lead when conditions improve. Recently the results of our work have included:

- Generating over \$2MM in revenue from new clients within 8 weeks of launching a new business sales program
- Linking the HR strategy to our client's new branding effort to drive profit by 20%
- Reducing the time to implement a new service offering by 40% through effective HR

We're sure we can provide similar value to you.

I will call you for an initial discussion about how we might partner together on (Insert DATE and TIME). I'm confident that Flanagan Consultants, LLC can work with you to seize the results others are missing today and to capture the opportunities of tomorrow.

Very truly yours,

Leo F. Flanagan, Jr., Ph.D.
Principal

OBJECTIVE	PREPARATION	TECHNIQUE
<ul style="list-style-type: none"> • To quickly demonstrate to the client that you are listening. • To schedule an initial meeting. 	<p>Modify the script below to suit your personal style</p> <ul style="list-style-type: none"> • Be sure: <ul style="list-style-type: none"> - To keep your script to 45 – 60 seconds (unless the client leads a longer conversation) - You are asking questions & listening - To speak no more than 30% of the time 	<ul style="list-style-type: none"> • Prepare your full list of Breakthrough calls to make in an hour. • Begin between 7 and 7:30 am (based on the client's local time. In Europe this is more likely to be 8:00-9:00) and continue for an hour. • Following a format similar to the Sample Script on the right – write down your key messages for each call. • Key messages should include: <ul style="list-style-type: none"> - Date letter was mailed - Opportunity mentioned in letter - One or two powerful examples where you have served a similar client or client need - Capabilities the client might be interested in - Available dates on your calendar

SAMPLE SCRIPT:

- **Greeting & Link to Letter**
Hello, this is (YOUR NAME) from (YOUR COMPANY). I'm calling to follow-up on my letter of (INSERT DATE).
 - **Message of Your Company's Differentiated Value**
 1. Determine 3 ways that your company is unique from your top competitors.
 2. For each way your company is unique write down an example where this provided quantifiable value to the client.

Examples
Reynolds Metal Fabricator uses the latest computer design and robotic technology to meet our clients outsourcing needs.
For example, one of our clients was able to upgrade its product 3 months ahead of its nearest competitor because of our state-of-the-art technology
Our logistics systems are the most up to date in the industry.
The dependability of our logistics has allowed our average client to reduce component inventory to 18 hours of production.
As one of the largest metal fabricators in North America we enjoy significant discounts.
When one client trusted us with 80% of their component needs we were able to pass on an additional 7% price reduction."
- **Offer to Invest in Knowing the Client**
I would like to have a better understanding of your personal objectives in relationship to your company and industry goals. When can we meet to discuss how (YOUR COMPANY) might help you address your needs (these issues)?
 - **Questions to Identify Needs**
Would you be interested in having a brief meeting focused on (INSERT OPPORTUNITY)?
What other aspects of your business performance would you like to see improved?
 - **If the Client Does Wish to Meet:**
I look forward to our meeting. Thank you for the opportunity to invest in our relationship.
 - **If the Client Does Not Wish to Meet at this Time:**
When would you like me to re-contact you or can I call you in a month's time?

Setting Expectations with the Client

TECHNIQUE	OBJECTIVE	OVERVIEW
<p>To immediately assure the client that there will be value created by this meeting in line with the client's needs and objectives.</p>	<p>In today's busy world, clients may become unclear or forgetful of the purpose and benefit of a meeting they've agreed to. Even if they recall the original purpose of the meeting, this technique demonstrates respect for the client's time.</p>	<p>This is a very simple, direct technique that should be used in the first few minutes of any client meeting. It shows a focus on the client and a commitment to meeting his needs.</p> <p>Preparation:</p> <ul style="list-style-type: none"> • Make sure you've reviewed your notes from the last meeting and/or phone contact with the client <ul style="list-style-type: none"> - Check that you are prepared to fulfill any commitments that you've made • Check for any recent events or developments in the client company and industry <ul style="list-style-type: none"> - Client website - Services such as online newspapers or Hoover's <p>Skill: Follow this outline:</p> <ul style="list-style-type: none"> • Thank the client for agreeing to meet with you today. • State clearly the objectives for the meeting. Make them specific and measurable and have no more than three. • State clearly the outcomes from the meeting. For example: "As a result of our meeting the following objectives will have been achieved:" • Ask the client if this meets with their expectations? • Ask them if there anything else they would like to add to the agenda.

Getting THEM to Ask for the Sale

OVERVIEW	TECHNIQUE	OBJECTIVE
<p>To engage the client so that they will seek not only a relationship with your company but also the buying, or increased buying, of your services and products.</p>	<p>We take the positive view that "Every client is our Client - some just don't know it yet." This technique is designed to drive sales in any situation – existing account, prospect, or potential.</p>	<p>There are three factors that can cause clients to buy more</p> <ol style="list-style-type: none"> 1. external factors like economic, political, and natural changes 2. factors within the direct influence of the 'seller'- like overwhelming capability 3. factors associated with self-motivation – the client decides for themselves <p>Self-motivation is by far the most powerful way to change client behavior and the one that leads to the highest switching costs for the client.</p> <p>Our technique builds upon this knowledge to help the client identify for themselves the value you can bring.</p> <p>It involves asking the same four questions of the client, in several different ways, to help them focus upon their current activity, possible levels of discomfort they may have with it, and to make your professionalism and your company's offerings more visible to them.</p> <p>Preparation: Make sure you know:</p> <ol style="list-style-type: none"> 1. The client's business. 2. The client's current supplier relationships. 3. The client's current or estimated budget. <p>Review:</p> <ol style="list-style-type: none"> 1. The recent events in the client company and industry. 2. Recent wins (sales) with comparable clients and the reasons for the wins. <p>Draft:</p> <ol style="list-style-type: none"> 1. A series of questions to use this technique with the client. 2. Utilize the form on the next page which provides a useful framework . 3. Determine sales material to take and leave behind

Getting THEM to Ask for the Sale

PHASE 1 Getting the client to review their goals and progress	PHASE 2 Restating the Client's Responses to Questions one – three	PHASE 3 Helping the client identify new opportunities	PHASE 4 Closing with commitment to a relationship
<p>Ask these four questions, in sequence,</p> <p>1. What do you want? In terms of:</p> <ul style="list-style-type: none"> • Business/unit performance. • Service to their customers. • Relationships with key players. • Linking to their company's strategy & overall business objectives. • Identifying their personal performance objectives/career aspirations. <p>2. What are you currently doing? In relation to the above.</p> <p>3. How is it working? Encourage the client to look at how the actions being taken are, or are not, moving toward what is wanted.</p> <p>4. What is your plan to address the issues identified above? The initial response is usually some form of maintaining what has been undertaken or "doing what I've been doing" and staying the course.</p>	<p>After the client has responded to the fourth question in depth:</p> <p>Return to the first question to validate/confirm your understanding of the client's needs. You may rephrase Question 1 - "What do you want?" as - "So, as I understand your goals, you are focused on (summarize what you've heard). Is there anything I've left out?" Take your time and give the client the chance to elaborate and verbally confirm what he wants.</p> <p>Restate the client's responses to Question 2 "What are you doing?" Pause after every related set of actions and re-state the client's relevant response to Question 3 "How is it working?"</p> <p>* Allow the client to elaborate whether their current actions (e.g. vendor relationship) are successfully moving them toward their objectives.</p> <p><small>NOTE: When you are reviewing/restating responses to Questions 2 & 3, this the perfect opportunity to interject questions about who the current vendors are for different products/services.</small></p>	<p>Next, summarize the client's response(s) to Question 4 "What is your plan?" using a different phrase with the same meaning - "What actions are you taking?"</p> <ul style="list-style-type: none"> • Again, encourage them to elaborate. • Look for problem areas where the client does not have a plan to improve the situation. Ask: Would you be interested in some ideas on how to move forward on.....? • If YES, offer either: To get back with some alternative solutions and/or examples of how you have helped other clients in similar situations <p>Close this phase with: "What options/alternatives won't you/haven't you considered?"</p>	<p>Suggest ways you and your company can provide value, given the clients objectives and needs</p> <p>Suggest and confirm next steps</p>

Summary

Walking the client through this sequence of questions 2 - 3 times will result in one of two things happening:

1. They will determine that they are not getting the results they desire and need to change their plan - they will own this decision and seek your help.
2. They will not respond immediately but they will continue to remember that there is some level of disconnect between the results they want and what they are doing. This will continue to be on their mind and may result in them calling you in the future for help or being more receptive to what you and your company have to offer on the next visit.

Summary & Evaluation of Initial Meeting

Assessment of Client Connection:

Check all that apply and circle best category (Positive, Neutral, or Negative)

Positive Connection	Neutral Connection	Negative Connection
<input type="checkbox"/> Good conversation & flow of meeting	<input type="checkbox"/> Satisfied with current relationship but wants to learn more about your company	<input type="checkbox"/> Completely satisfied with current vendor
<input type="checkbox"/> Problematic area identified	<input type="checkbox"/> Advised you to "stay in touch"	<input type="checkbox"/> Took phone calls or left meeting
<input type="checkbox"/> Details of current strategies/programs/structure revealed	<input type="checkbox"/> Invited to compete on RFP, but others are invited too	<input type="checkbox"/> Short, non-specific replies
<input type="checkbox"/> Dissatisfaction with existing relationship revealed	<input type="checkbox"/> Client is not ultimate decision maker	<input type="checkbox"/> Bad history with your company
<input type="checkbox"/> Client asked for a follow-up meeting		<input type="checkbox"/> No chemistry/bonding
<input type="checkbox"/> Obtained specific task/assignment		<input type="checkbox"/> Took meeting with you due to Sr. Management mandate
<input type="checkbox"/> Client wants to bring in colleagues or management		

Self-Assessment:

	Would like to improve	1	2	3	4	5	Very strong
1. Researched the client company prior to the meeting.	1	2	3	4	5		
2. Prepared for the meeting.	1	2	3	4	5		
3. Used the Open A Meeting technique.	1	2	3	4	5		
4. Used the Changing Client Behavior: Getting Them To Ask For The Sale questioning technique.	1	2	3	4	5		
5. Listened to the client.	1	2	3	4	5		
6. Conveyed a consistent "message" to the client.	1	2	3	4	5		

Area for Improvement:

The one thing I'd like to improve in my next client meeting is:

OBJECTIVE	TECHNIQUE	CONTENT
<p>To help advance the sale after the initial meeting with the prospective client.</p>	<p>To be written from the client perspective:</p> <ul style="list-style-type: none"> • Forms the basis for the next meeting or simply closes the activity with the client if there is no interest at this time. • Seeks clarity from the client without another sales call. • Shared with the team it can form the basis for assigning resources and effort on this prospect. 	<p>Thanks and Why Your Company Thank the Client for their time and information</p> <ul style="list-style-type: none"> • The purpose of the letter is to ensure a joint, accurate, understanding of the client's current situation. • It is also a statement of your confidence in solving the Clients problem. <p>Current Business Situation</p> <ul style="list-style-type: none"> • One to two bullet points summarizing the key points about the overall situation the client's business is in. • Two to three bullet points summarizing the key business concerns/ issues identified in the meeting. <p>Follow-on Actions</p> <ul style="list-style-type: none"> • Bullet point for each action you have committed to take to help client. Each should be succinct and include a date by which you will complete the step. • Bullet point for each action the client has committed to take in partnering with you (e.g. information to be provided). Be sure to point out where your response is contingent on a client action, and include a date by which you hope the client has completed each action. <p>Closing</p> <ul style="list-style-type: none"> • Invite the client to contact you if there are any corrections or additions to your understanding of the meeting. • Reinforce that you look forward to a mutually beneficial relationship.