USING EXECUTIVE ASSISTANTS, PROCESS, AND PROCEDURES TO AUTOMATE YOUR PERSONAL NETWORKING/SALES STRATEGY

DANNY MIZRAHI – CEO, CONTANGO IT, DM@CONTANGOIT.COM

BUSINESS FUNDAMENTALS BOOTCAMP

Tactical Skills for the Growing Business

AGENDA

1. SALES PLAYBOOK
2. EA PLAYBOOK
3. CRM
4. SALESPERSON PROCEDURES
5. SALES FLOW CHART
6. OPERATIONS MINDMAP
7. THE 3 I'S
8. POST MEETING TO CLOSING DEALS

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

SALES PLAYBOOK

- START WITH WHY
- COMMON DOOR OPENERS
- COMMON TRIGGERS
- OBJECTION & REBUTTALS
- PRINCIPLES AND VALUES
- CLIENT STORIES
- KEY DIFFERENTIATORS
- ELEVATOR PITCH
- SERVICES
- SALES PROCESS

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

2. Why do you need to know my budget?
    1. **Rebuttal:** There are many different ways to skin a cat. We can create a solution that has all of the bells and whistles, or we can make sure we make the most of your budget and time-frames. *When the client doesn't answer, throw out numbers:* "Well if our proposal was $10,000, is that okay?" "If it's $2,500 does that make sense?"
3. Why are the Estimates so high?
    1. **Rebuttal**: While we think that our estimates are very accurate, we always would rather add extra time and Contango hours **never** expire and are transferred to Contango OnCall. It is much better to have extra time remaining, than explain that we need to go back to your accounting department, or have to get additional approval.
4. Why are there OnCall hours
    1. **Rebuttal**: We've never had a project where we didn't get out of scope requests during the project. If we only have time available for specific tasks, then when the client says "can you do this while you're here" our consultants have to say no. It goes back to dispatching and our dispatcher simply sees if there is any Oncall or extra hours so we can handle that task.
5. Why is there so much PM time?
    1. **Rebuttal**: By doing the Project Debrief, Project Kickoff Call, etc, we're able to keep track of hours, tasks and make sure we are as efficient as possible during the project. During the Debrief, we make a list of everything you need to be prepared for. It's the worst when our consultants come on-site and we can't get work done. For example, we need to prepare the entire company for downtime. Another example is when we need access to machines, or CDs made available for install, etc. etc.
6. Why do I have to prepay?

EA PLAYBOOK

- EMAILS
- CONFIRMATIONS
- CALENDARING & INVITES
- CRM
- CANNED RESPONSES
- DAILY TASKS
- INTRODUCTIONS
- FOLLOW UPS

If they are a Prospect/lead:

1. Reply to previous email
   a. *Note: unless a check in has been done on same thread, then compose new email.*
2. Click canned response - "Prospect - checkin"
   a. *Note: if there is important information we're referring to, then "Make sure you got proposal" instead*
3. Change who the email is addressed to
4. Click Green arrow in SN
5. Log call as sent check in email
6. Click Follow up activity
7. Set follow up for 1-2 weeks for the first follow, 2-3 weeks the second follow up, and 1-2 months the third; check in; high priority first follow up, medium for subsequent follow ups.
8. Click Save

Almost All Other Contacts:

1. Compose new email
2. Draft to main point of contact(s)
   a. *Note: If unsure, it's usually the one who signs the proposals*
3. Subject: "Contango IT Touch Base - Company Name"
4. Click canned response - "TB"
5. Change who the email is addressed to
6. Click Green arrow in SN
7. Log call as sent check in email
8. Click Follow up activity
9. Set follow up for 3-4 months, check in, medium priority
10. Click Save

Did he/she reply:

These are notes to follow up on tentative meeting requests/scheduling. For example, when you schedule an appointment, you'll put a task in SN to follow in a 2-3 days with "did he/she reply".

1. Search contact's email address
2. Find email that requested the meeting
3. Draft an email similar to the following:

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

CRM

C	D	E	F	G
	Mike	Glenda	Camille	Notes
Check-in		x		moved tomorrow
Did he accept the invite for video screen on 9/26?	do		x	Asked him
Did he confirm for a meeting with his client?	tomorrow		x	
Did he confirm for breakfast on 10/7?	do		x	Sent follow up email
Did he get proposal?	tomorrow		x	
Did he reply about catching up?	do		x	Draft not yet sent
did he reply about cyber security needs	do		x	Last email sent yesterday
Did he reply about meeting Lena?	do		x	Draft not yet sent
did he reply about redacted report	do	x		no reply yet
Did he reply about the check in on the possible opportunity?	do		x	Draft not yet sent
Did he reply about the Execs invite?	do		x	Email sent today
Did he reply about the hospitality blurb sent?	do		x	Sent only yesterday
Did he reply about the leak in the conference room?	do		x	Fixed as per Danny
Did he reply about the NFR?	yes		x	
Did he reply about the times he's in the city?	do		x	Draft not yet sent
Did he reply about Tom Krolikowski's video screen?	do		x	No update yet
did he reply for a call on 9/26 at 10:30am	do	x		follow up email sent 17hrs ago
did he reply for breakfast on 10/10?	do	x		followup email sent
did he send an estimate?	do		x	He will send it EOD tomorrow per h
Did Jon review security?	1 week		x	
did she get additional recs	yes 2.5 weeks checkin		x	
Did she reply about the 10-hour OnCall renewal?	friday did we get check		x	
Did she reply about the 10-hour renewal?	tomorrow		x	

/18 | 9/19 | 9/20 | 9/23 | 9/24 | 9/25 | 9/26

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

EMAIL DRAFTS

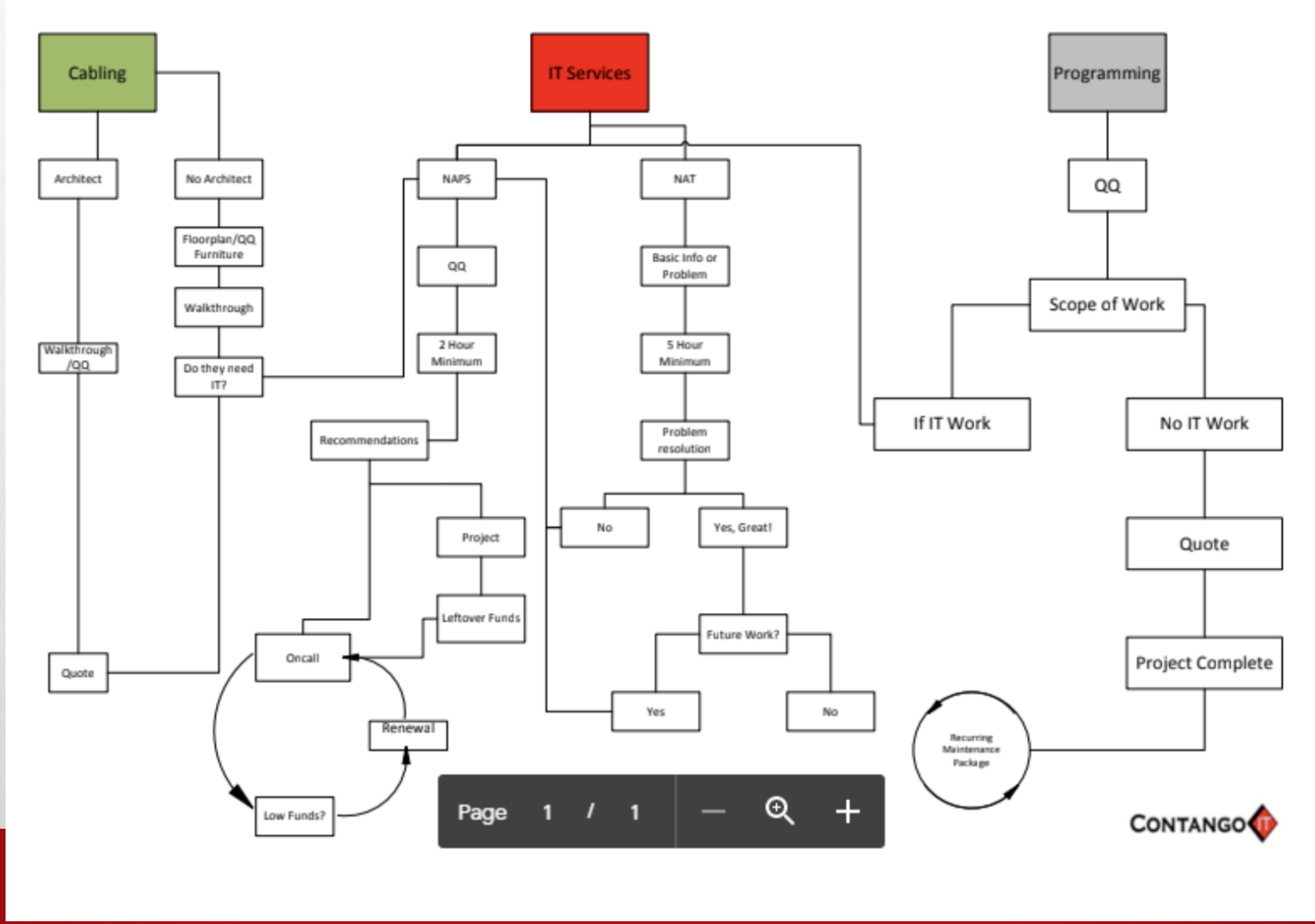
BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

SALESPERSON PROCEDURES

- INITIAL PHONE CALL OR MEETING
- NEEDS ASSESSMENT / PROJECT SCOPE
- RECOMMENDATIONS
- INITIAL PROJECT OR IMPROVEMENTS
- ONGOING SUPPORT
- NETWORKING
- TRACKING IN CRM
- FOLLOWING UP CONSISTENTLY
- BASIC INDUSTRY KNOWLEDGE
- PROPOSAL CREATION

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

SALES FLOW CHART

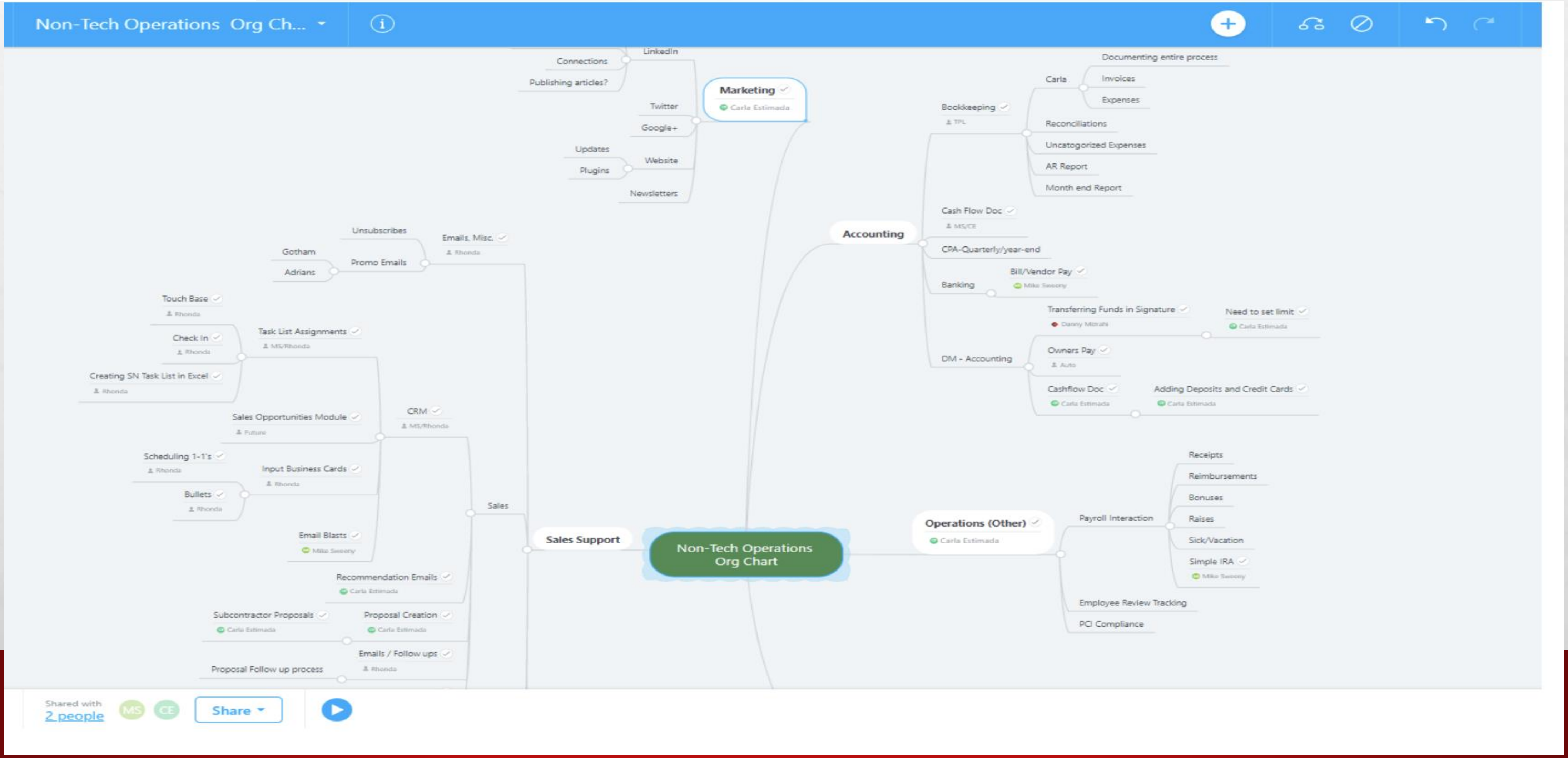


BUSINESS FUNDAMENTALS BOOTCAMP

Tactical Skills for the Growing Business

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

OPERATIONS MINDMAP



INFORMATION, INTRODUCTION, INVITATION

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

AFTER MEETING THE PERSON

"BFAST"

- IT WAS GREAT MEETING YOU! I'D LOVE TO GET TOGETHER AND CHAT MORE. ARE YOU FOR BREAKFAST FREE ON WEDNESDAY 9/20 AT 8AM AT CUCINA ABOVE GRAND CENTRAL? PLEASE LET ME KNOW IF THAT WORKS FOR YOU AND I'LL SEND INVITE.

"FRIARS"

- IT WAS GREAT MEETING YOU! I'D LOVE TO GET TOGETHER AND CHAT MORE. ARE YOU FOR FREE FOR DRINKS ON WEDNESDAY 9/20 AT 4:30PM AT THE FRIAR'S CLUB? PLEASE LET ME KNOW IF THAT WORKS FOR YOU AND I'LL SEND INVITE.

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

FOLLOWING UP

- NETWORKING CONTACT – TOUCH BASE, EVERY 6 MONTH
- PROSPECTS – EMAILS INCREASING BETWEEN EACH, 2 WEEKS, 1 MONTH, 3 MONTHS, 6 MONTHS
- CLIENTS – CHECKIN, EVERY 2-3 MONTHS
- ALL EMAILS AUTOMATICALLY DRAFTED
- ALL TRACKED IN CRM BY EA

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business

WE GOT A LEAD, NOW WHAT?

"ADD MIKE"

Camille, it's a pleasure to meet you! We'd love to help in any capacity, even if it's advice or a second opinion. I'm adding Mike, our VP of Account Management, who would be more than happy to learn about the project. Mike is our point person on tech support so you're in better hands with him than me. I'm around of course!

Thank you!

"NAPS"

It was a pleasure speaking with you!

As we discussed, attached is the 2-hour proposal for the Needs Assessment / Project Scope, with a small discount, so you can see the quality of our work. If you would sign and fax or scan back, pages 4 and 7 being the important ones, it goes to our Service Coordinator who will follow up with onboarding and scheduling.

PROPOSALS

- FOLLOWING UP – INCREASING 2 DAYS, 3 DAYS, 5 DAYS
- IF NO ANSWER – ADDED TO MY CALL LIST

DEAL CLOSED

- ”ONBOARDING” CANNED RESPONSE

Great! Looping in our Service Coordinator who will follow up with onboarding and scheduling the initial assessment. As previously mentioned, Maryn and Abby will follow up about invoicing.

Thank you!

QUESTIONS?

DANNY MIZRAHI – CEO, CONTANGO IT, DM@CONTANGOIT.COM

BUSINESS FUNDAMENTALS BOOTCAMP
Tactical Skills for the Growing Business