



Advanced Prospecting

2-Day Workshop Agenda

Day 1

8:30-8:45 am - Welcome, Introductions, and Setting the Stage

8:45-10:00 am - The Psychology of the Sale & Prospecting Mindset

- Overview of the sales process and methodology
- Understanding the buyers process and roadblocks to prospecting
- Taking a sale further down the process and partnering with the AM
- Establishing Mutual Commitment (Up Front Contract)

10:00-10:10 am - Break

10:10-11:45 am - Understanding Your Communication Style as a Seller & Extended DISC

- The importance of Bonding & Rapport & Active Listening
- Words, Tonality, and Body Language
- Active vs. Competitive and/or Passive Listening

11:45-12:15 pm- Identifying Opportunities & Developing a Prospecting Plan

- Social Prospecting (LinkedIn)
- No Pressure Conversation
- Pattern Interrupts

12:15 - 1:00 pm - Lunch

1:00 - 2:00 pm- Identifying Opportunities & Developing a Prospecting Plan - Continued

- Discovering Business Pain (issues to solve and gaining trust)
- Power of Stories

2:00 - 2:45 pm - Maximizing Sales Enablement Tools

- ZoomInfo usage and aligning with intent feature
- Using AI for customer profiling
- Multi-Channel Prospecting

2:45 - 3:00 pm - Break

3:00 - 4:30 pm - The No-Pressure Prospecting Conversation

- Discover how to connect faster and build trust with prospects
- Role-play the no-pressure call
- Introduce the AI Role Play Tool

Day 2

8:30-9:00 am - Day 1 Recap and Reinforcement

9:00 -10:30 am - Better Understanding Through Asking Questions

- Techniques to uncovering issues/needs
- No mind reading
- Questioning Strategies
- Negative Reverse Selling

10:30 - 10:45 am - Break

10:45 - 12:00 pm - Guiding Your Buyer's Decision Process

- Impediments to Winning
- Facilitating the Initial Buying Process
- Making Effective Recommendations

12:00 - 12:45 pm - Lunch

12:45 - 2:00 pm- Uncovering the Truth Behind Stalls and Objections

- Reversing
- Not-Ok
- My Big Concern

2:00 - 3:00 pm- Captivating Attention with Email and Text

- The Approach
- The Language
- Practice
- Follow-Up Best Practices

3:00 - 4:30 pm - Close Out

- Final Role Plays
- Q&A
- Best Practices
- Next Steps - AI Role Play Tool and Follow Up Virtual Session

Actions and Commitments



Selling Atmosphere

- **Highly technical solutions (test & measurement, secure communications, broadcast, aerospace/defense, cyber security)**
- **Long, complex buying cycles**
- **Highly regulated industries**
- **Sophisticated technical and procurement stakeholders**



Understanding “Prospecting” Conviction

Conviction is a firmly held belief in the value of your product/service **and** your ability to provide solutions to your buyer’s needs.

1. Builds trust with clients
2. Enhances communication effectiveness
3. Drives persistence in the face of rejection
4. Fuels passion that motivates both the seller and the buyer

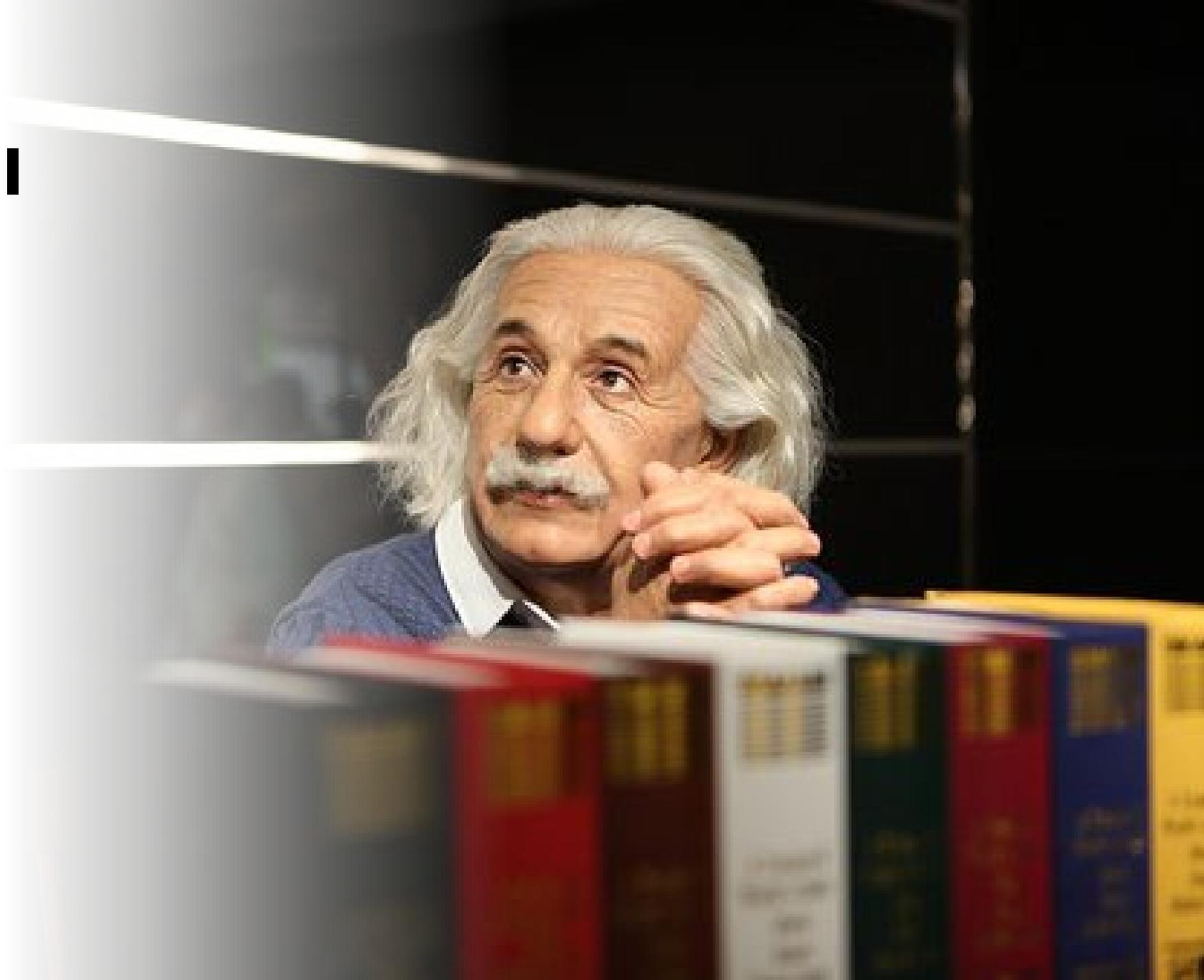


**“I have no
special talent. I
am only
passionately
curious.”**

***My*
UNFAIR ADVANTAGE**

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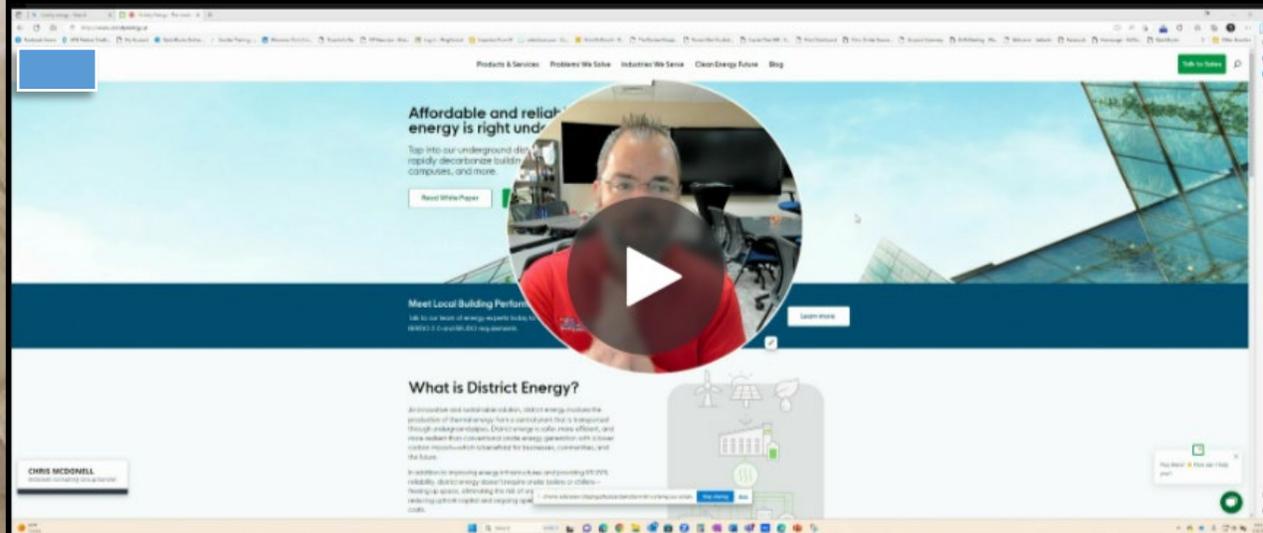




Missing Persons Video

How often does someone miss a meeting?

Tip: Do a video summarizing the notes of the meeting and send to the “Missing Persons.” Copy the others.



A Perfect (and Deadly) Pairing

BUYER



Express interest



Act motivated



Obtain information



Avoid commitment



Disappear



Conduct needs analysis



Present or propose



Attempt to close



Handle objections



Follow up

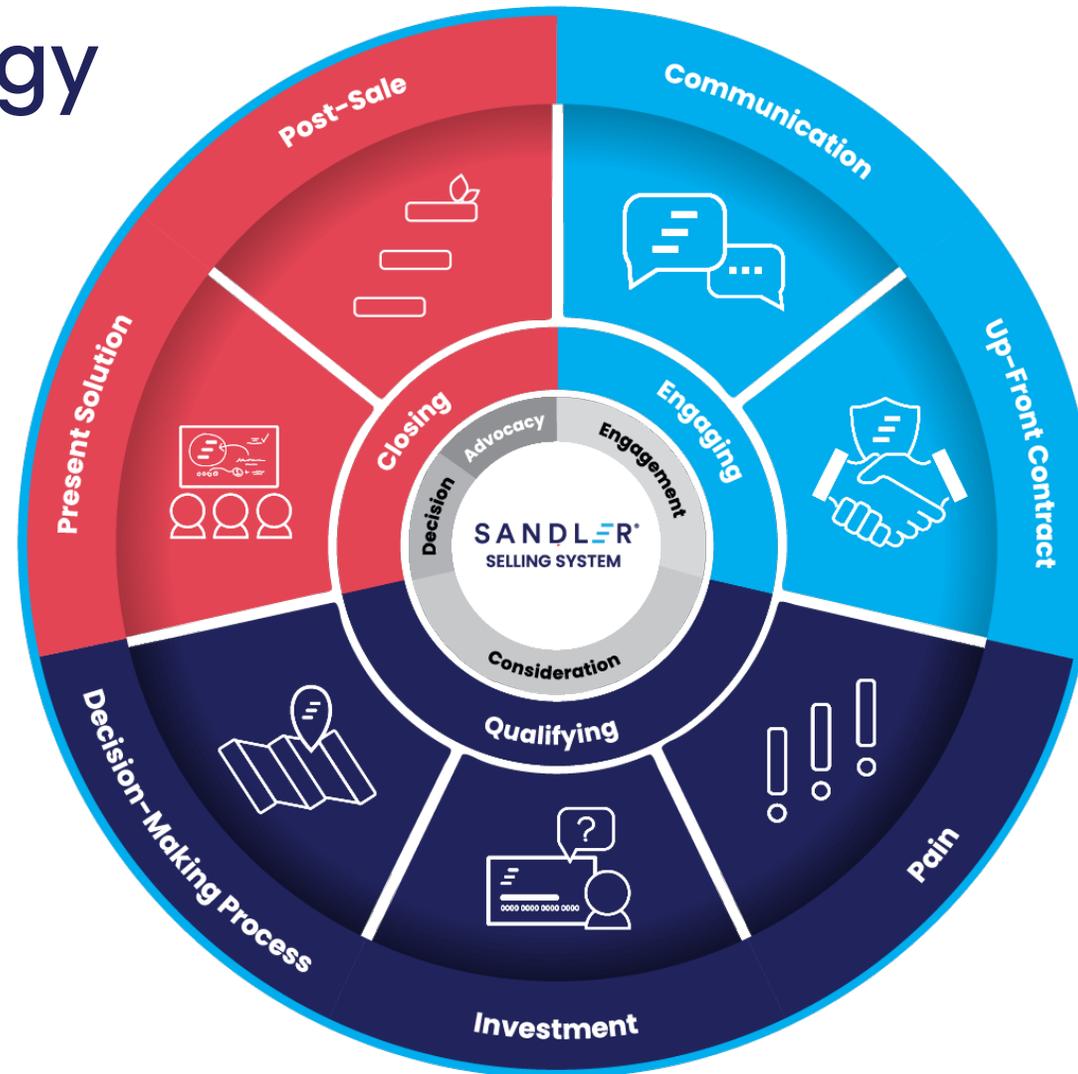
SELLER



**Who is leading the
buyer/seller dance?**

1. Mislead
2. Gather information
3. Commit to Nothing
4. Hide

Sandler Methodology





The
Prospecting
Mindset

01



Differentiating
Through
Pattern
Interrupt

02



Executing a
No-
Pressure
Call

03



Creating
Your
Prospecting
Plan

04

The Sandler Success Triangle

—Attitude

- Your thoughts, feelings, and beliefs

—Technique

- Skills and tools to perform effectively

—Behavior

- The things you do



Sandler Prospecting Outcomes

- Find and create more solid business opportunities
- Differentiate yourself
- Lock down rock solid appointments
- Develop confidence
- Achieve your professional and personal goals

Belief Wheel



What is my Mindset?



NEGATIVE

- It's not ok to challenge prospects
- Prospects see salespeople as a nuisance
- Prospecting feels too pushy
- Prospects don't see me as a resource
- I'm not confident calling at higher levels
- I don't have time for prospecting



POSITIVE

- Prospects value a new perspective
- My genuine focus on solutions has value
- Prospects recognize my sincere intention to help
- I am a trusted advisor
- I have equal business stature
- Prospecting is a priority to reaching my goals

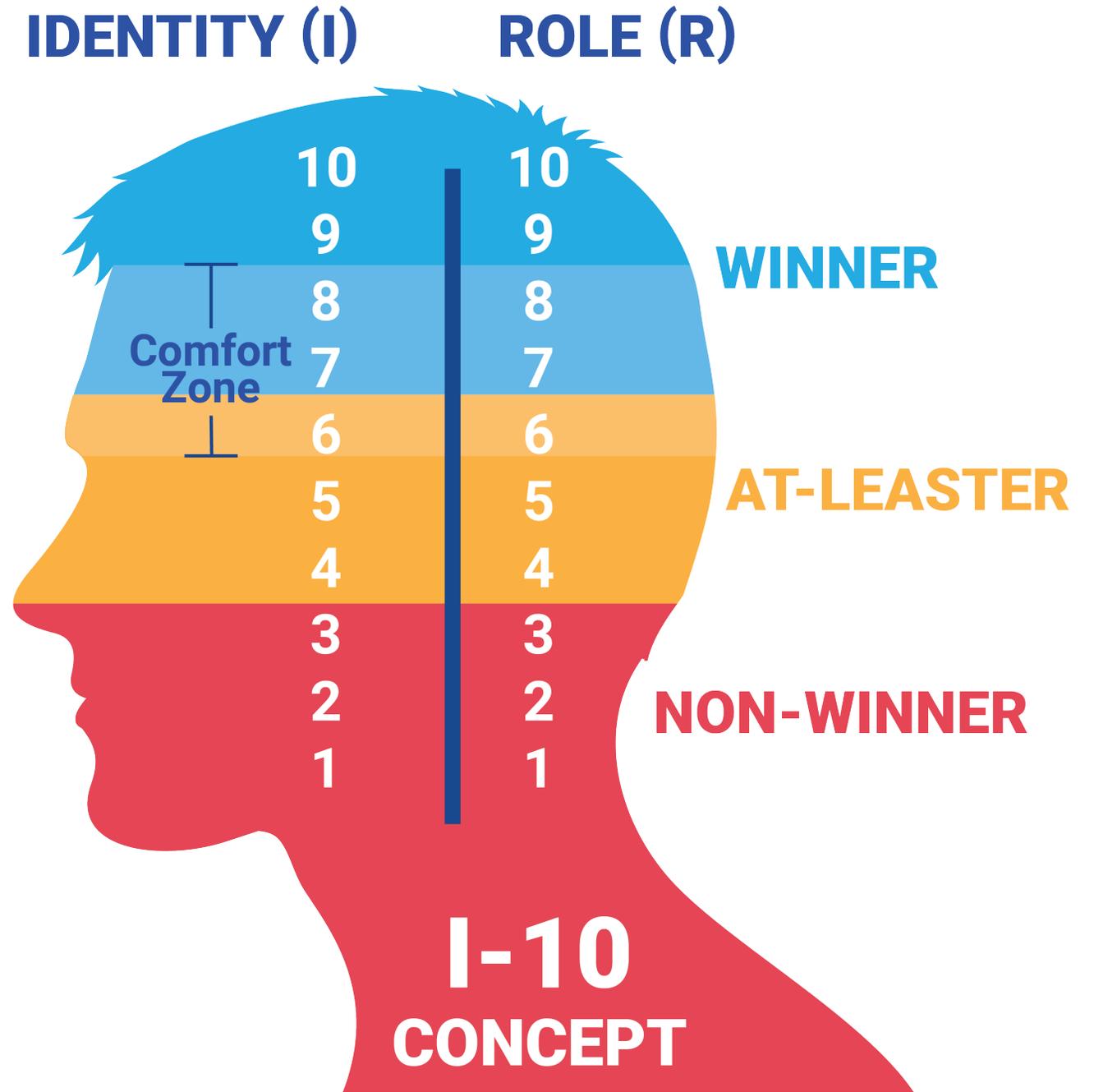


Desert Island Exercise



- Everyone close your eyes now and take a few deep breaths.
- Now imagine that you are being dropped off on a deserted island.
 - You're leaving behind all the different roles you play in your life: partner, spouse, parent, employee, friend, customer service provider...
 - With all those roles left behind, you are just YOU. Just being YOU, sitting on this island enjoying the breeze and being in nature. No responsibilities, no to-do lists.
 - Now that you've been stripped from all the roles you play in your life and you're just left with you
 - Give yourself a score from 1 – 10.

Identity vs. Role





Equal Business Stature

Seeing yourself as an equal in the relationship, and professionally asserting your right to have open and honest communication.

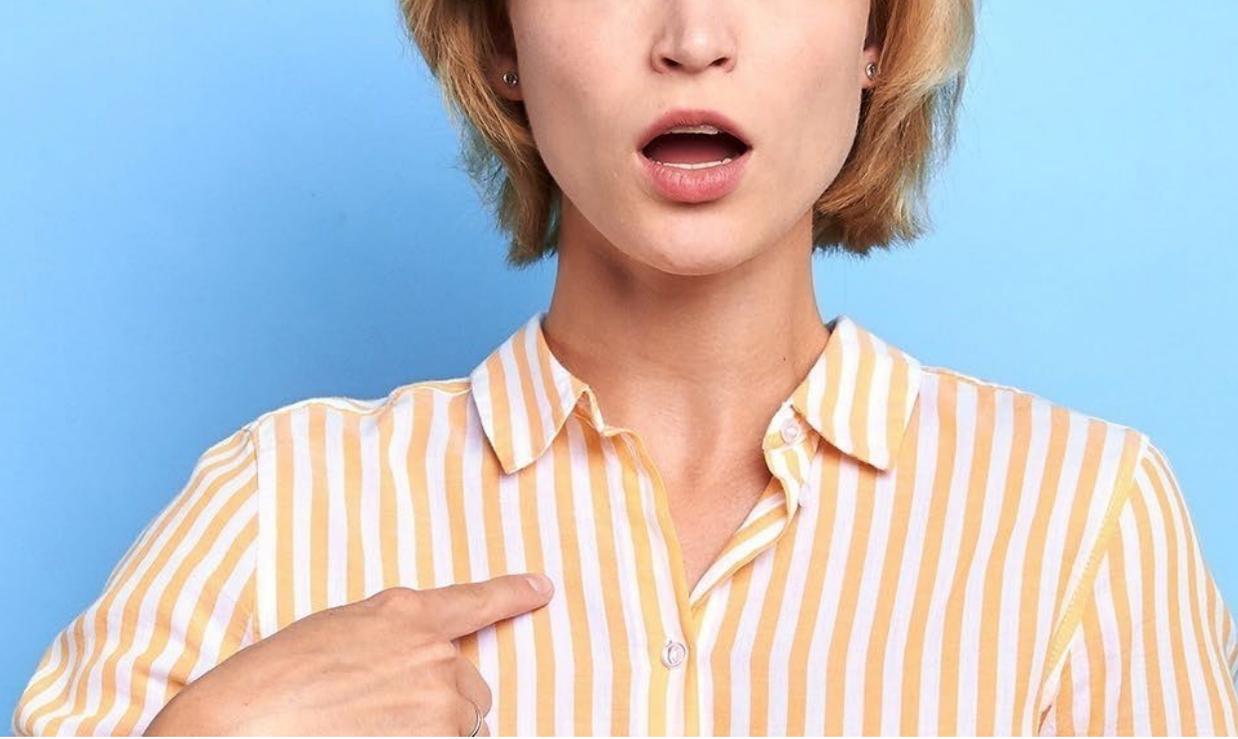
Elevating and Differentiating Yourself

To create chemistry with buyers when prospecting, we need to consider how people form opinions and connect with each other.

- Verbal and non-verbal communication
- Pattern Interrupt
- Connect Questions
- Communication Styles

Elements of Communication





“

That's a really nice shirt...

”

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Listening is HARD!

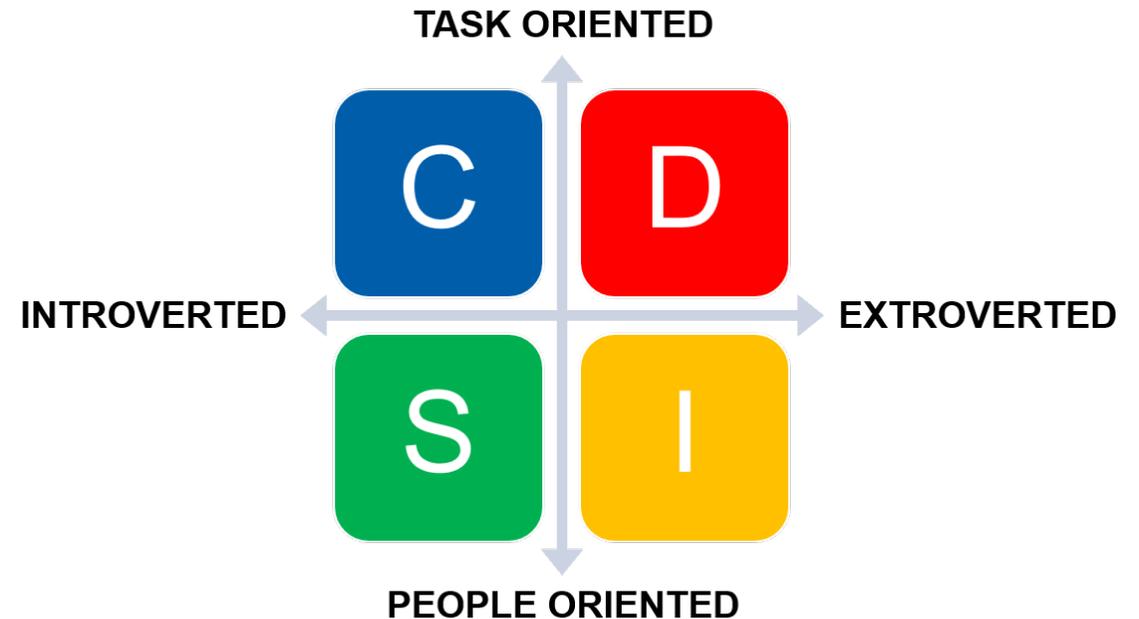
- Combative or Competitive – Listening to fight back or prove you wrong.
- Passive – Listening but not responding, either physically or emotionally.
- **Active** – Listening with attention, ask defining questions, and confirm the message.



Listening Activity

DISC Behavioral Styles

- DISC is a preference-based profile and does not predict or indicate ability.
- **NOTE:** No one style is better than any other.
- DISC styles are not good or bad, they just are.
- It is our job to be a professional communicator first, and comfortable second.



Edna Sample

Organization: ABC Inc Date: 12.09.2013

Edna at a Glance

This page is a description of how others are likely to perceive you. In other words, while the text describes your typical behavior as seen by others, you certainly can modify your behavior to fit the needs of a particular situation and/or individual(s). Also, you may have already addressed the development areas by learning new skills.

How Others May Perceive You:

Decisive, purposeful, bold, social, motivating, competitive, active, alert, exact, smart, open, strong-willed, goal-oriented, creative, conscientious.

How Others May Perceive Your Communication Style:

She can often explain why some things need to be done and motivate others, but not always. Sometimes she tends to be too outspoken. Although people do not find her easy to approach nor identify with, she is still interesting to listen to.

How Others May Perceive Your Decision-making:

Under normal conditions, she has no difficulty forming an opinion. Some decisions that concern people may be complicated for her because she has to balance between different values. Sometimes she deliberates and philosophizes so much that she digresses from the subject.

Edna's Strengths:

- Is not afraid of doing new things
- Has the courage to consider taking risks
- Makes even difficult decisions
- Forward-looking analytic thinking
- Looks for change
- Adjusts quickly to surprises
- Concentrates on the matter
- Can analyze from many sides
- Sells her ideas
- May generate surprising thoughts
- Doesn't fall into a routine
- Can go her own way

"Knowing yourself is the beginning of all wisdom."

- Aristotle

Your Style at a Glance

A description of how this style of person **is typically seen by others** – ask for others' opinion and comments!

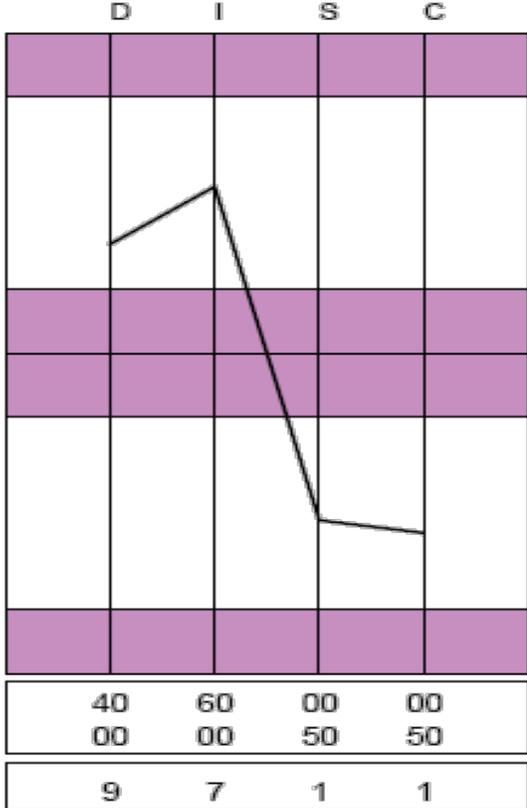
You can certainly modify your behavior to fit the needs of a particular situation and/or individual(s).

Also, you may have already addressed the development areas by learning new skills

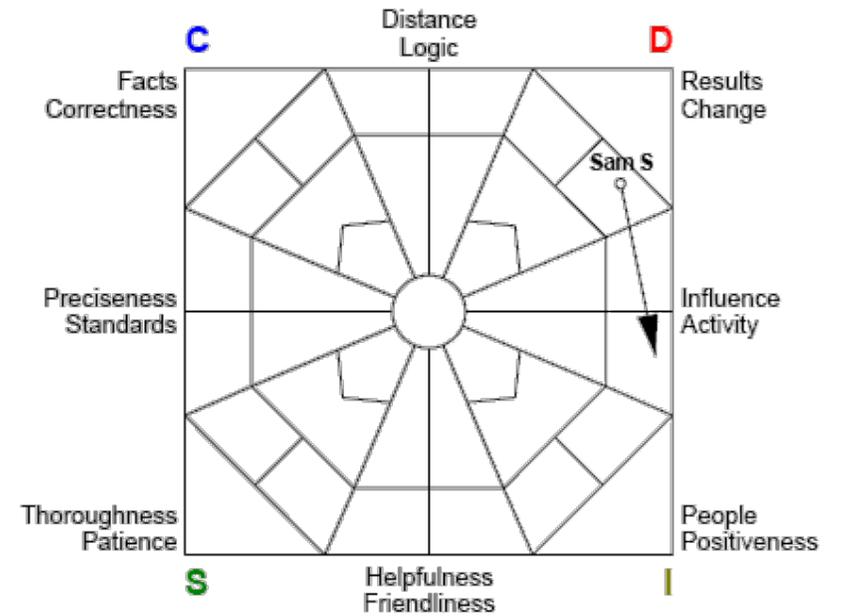
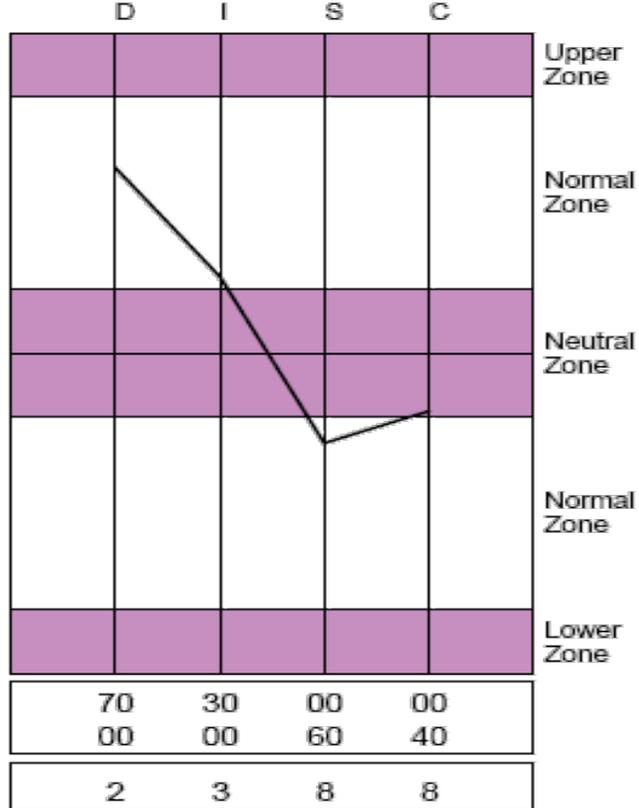
NOTE: Sample of "Your Style at a Glance." This section may vary.

Your Natural Style

Profile I - Perceived Need to Adjust



Profile II - Natural Style



Your Natural Style – Who you really are. This style remains fairly stable, but not rigid, over your lifetime. Your Natural Style is the style that is most comfortable for you.

Motivators - Comfort Areas

Suzanne is more likely to respond positively and feel energized if these factors are present in his/her work environment.

- Renewal, generating ideas
- Possibilities to win and achieve
- Freedom from restrictions and chains
- Opportunities to control and manage people
- Achieving results through people
- Varying and multifaceted situations
- Moving
- Meeting new people
- Possibilities for fast reaction
- Possibility to decide by herself
- Venturing into the unknown
- Deciding her own matters

Situations that Reduce Motivation

These are items that Suzanne may not like much and are likely to decrease his/her energy level and motivation.

- Being a bystander
- Detailed instructions
- Public failure
- Showing weaknesses
- Losing position
- Boring and dull people
- Wavering
- Routine duties
- Waiting, standing in a line
- Chains, restrictions
- Being "at the tail-end of the group"
- Slower paced people

Your Strengths

Strengths are items that tend to be easier, more natural and require less energy from you. Most of us tend to overlook our strengths, even taking them for granted. Do not let that happen to you. Instead, consider the items listed below and think how well you are taking advantage of these valuable behavioral traits. Please use caution however; remember that an overused strength very often becomes a weakness and a serious liability to our performance.

- Encourages people to participate
- Looks for ways to improve atmosphere
- Keeps up the positive growth
- Takes care of all people-relations
- Wants to develop step-by-step
- Wants to plan his own work
- Gains people's trust easily
- Is open and works for his goals
- Can listen as well
- Doesn't want to rule other people's lives
- Takes care of friends
- Has others' interests in mind as well

Reactions to Pressure Situations

These are NOT descriptions of your weaknesses or present behavior. They are items that you should be cautious about since these reactions in pressure situations may become more evident. Understanding how you react to pressure situations can make it easier to deal with them.

- Misses the "technical improvements"
- Slows down after feeling good
- Bungles with details
- Cannot be separated from people
- Doesn't ride the wild horses; avoids going into dangerous areas
- Is difficult to inspire to fight
- Cannot change after giving a promise
- Forgets the details
- When looking for a compromise, finds nothing
- Operates emotionally
- Accepts but doesn't follow
- Too soft and nice

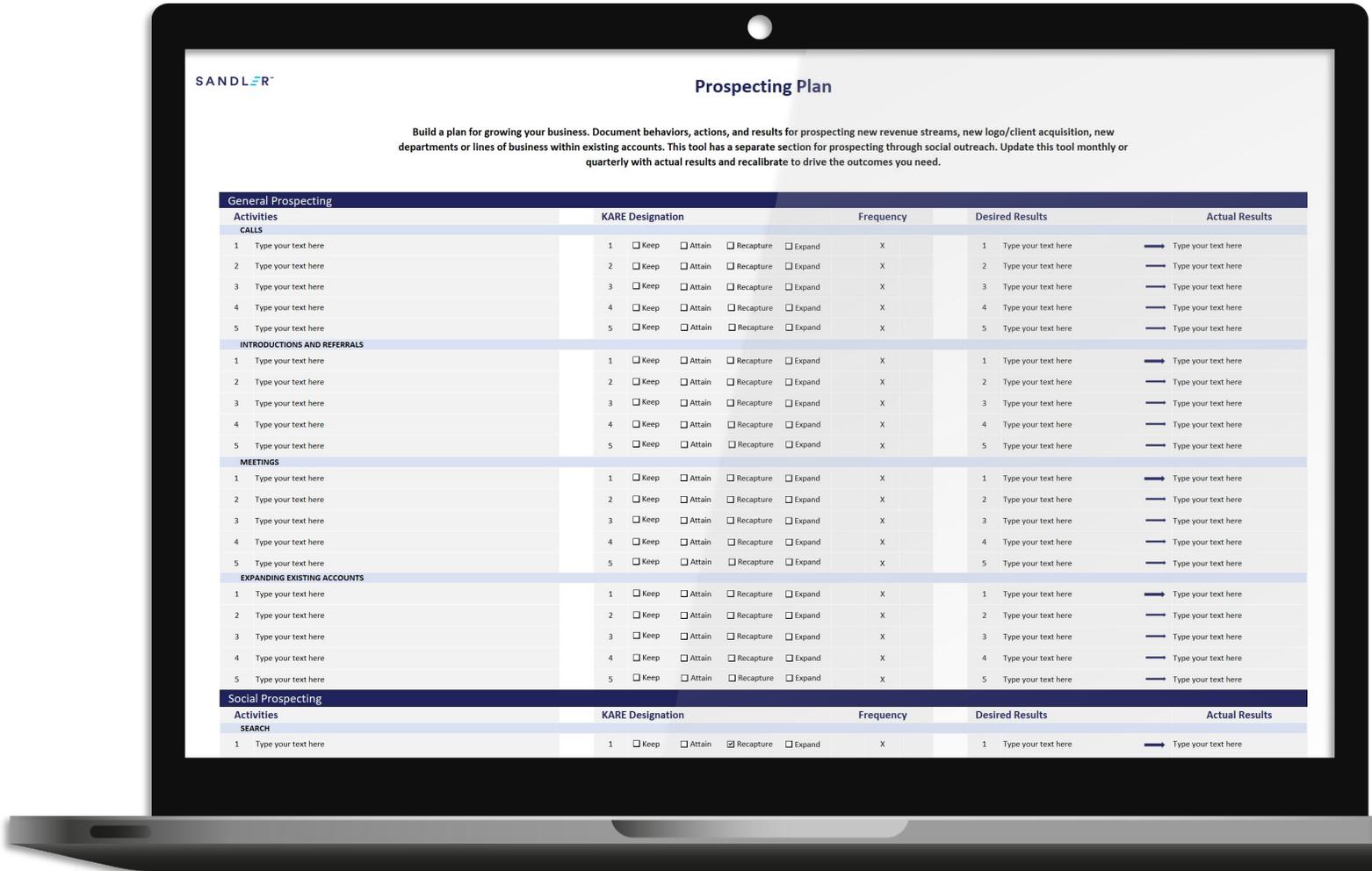
Prospecting Activities

- Calls
- Introductions and referrals
- Meetings
- Expanding existing accounts
- Social outreach



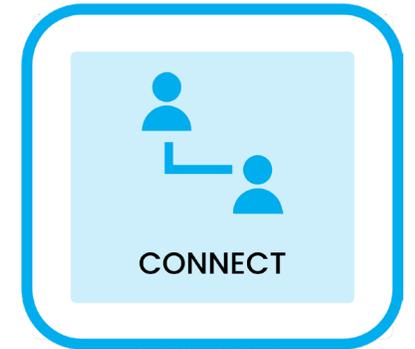
Prospecting Plan Tool

This tool will be shared after the session.



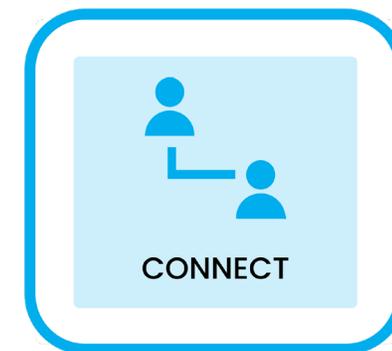
Search

- Advanced searches with filters
- Company searches
- Searching within connections
- Searching posts and news
- Searching within groups
- Clicking through prompts like:
 - People Also Viewed
 - Similar Companies



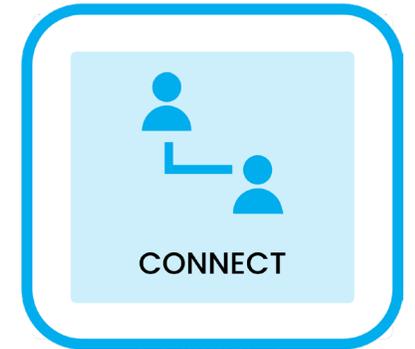
Learn

- Job changes within their organization
- Job anniversaries
- Industry news or changes
- Product launches
- Events
- Connections made
- Frequently used hashtags



Connect

- Liking, sharing, and commenting on prospects' posts
- Sharing relevant information with your prospects
- Seeking and providing introductions
- Joining similar groups
- Starting a conversation with people who have liked, commented, or viewed your profile



Consistent LinkedIn Behavior for Effective Social Prospecting

Cadence:

- **Daily:** 15–30 minutes engaging with posts and sharing content.
- **Weekly:** Search for new prospects, send personalized connection requests, and follow up.
- **Monthly:** Update your profile to reflect current achievements.

Key Actions:

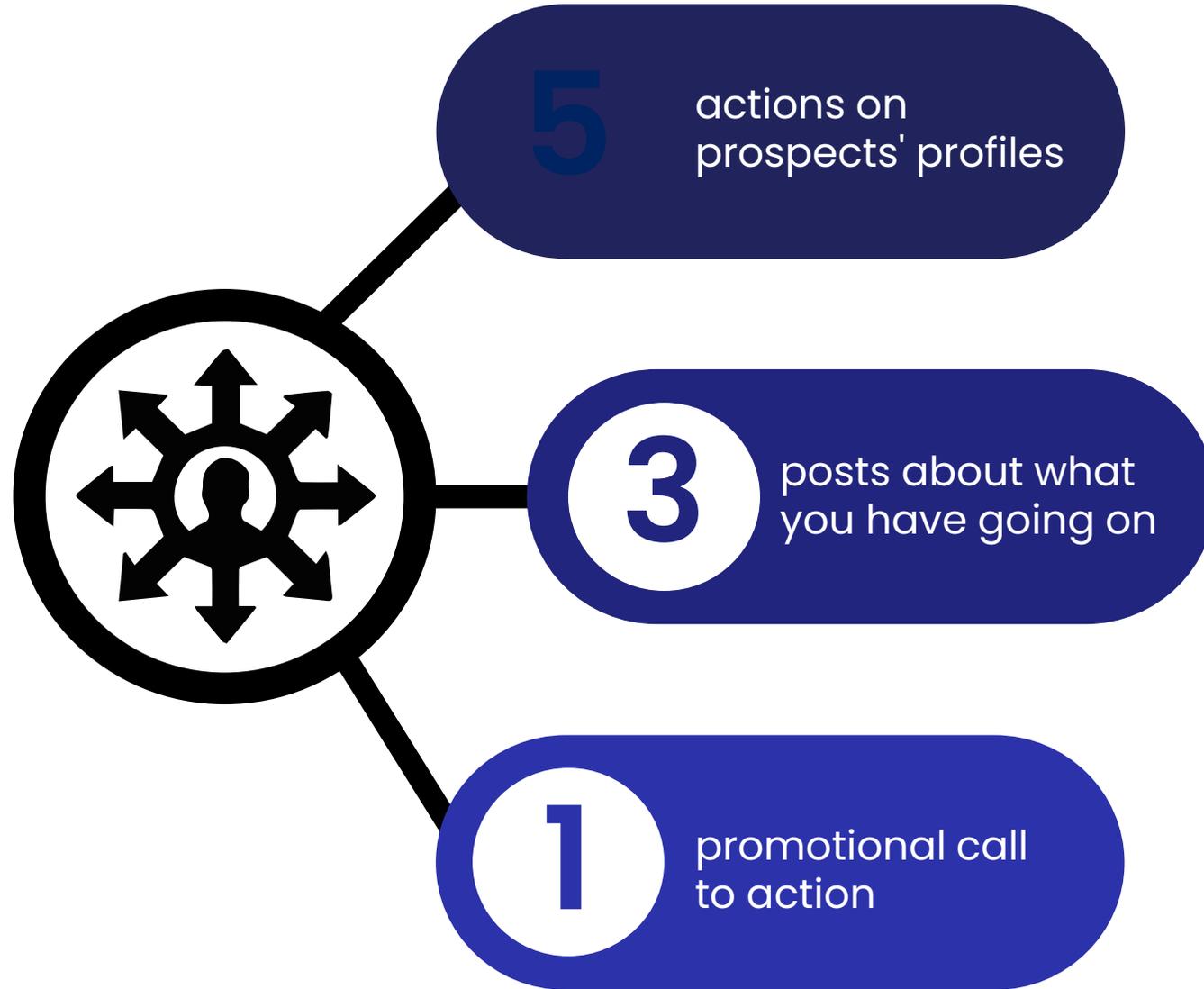
- **Search:** Use Advanced Search to find new prospects.
- **Learn:** Review industry trends and company updates.
- **Connect:** Personalize connection requests and engage regularly.

Researching the Client:	
Do you have any mutual connections with the client?	Type your text here
How many connections does the client have?	Type your text here
What college did the client attend/degree attained?	Type your text here
What is the client's hometown and current city?	Type your text here
Where did the client work previously?	Type your text here
How much time did the client spend at previous jobs?	Type your text here
Which companies and groups does the client follow?	Type your text here
What type of info does the client post/share? Which influencers does the client follow?	Type your text here
What activities and interests does the client list?	Type your text here
To which industry groups does the client belong?	Type your text here
Does the client endorse others? Is the client endorsed often and for what?	Type your text here
Has the client been recommended by anyone? If so, by whom?	Type your text here
Does the client support any charities or initiatives?	Type your text here
What trigger events are showing in client's feed?	Type your text here

Researching the Company:	
How does the company present itself in its profile? Are there any key themes?	Type your text here
What competitors are identified in the company's "also viewed" section?	Type your text here
Do you have any connections with former employees?	Type your text here
Is the company currently hiring full-time employees? In what areas?	Type your text here
What key products/services does the company highlight in its profile?	Type your text here
Can you identify any connections after scrolling through the company's employee list?	Type your text here

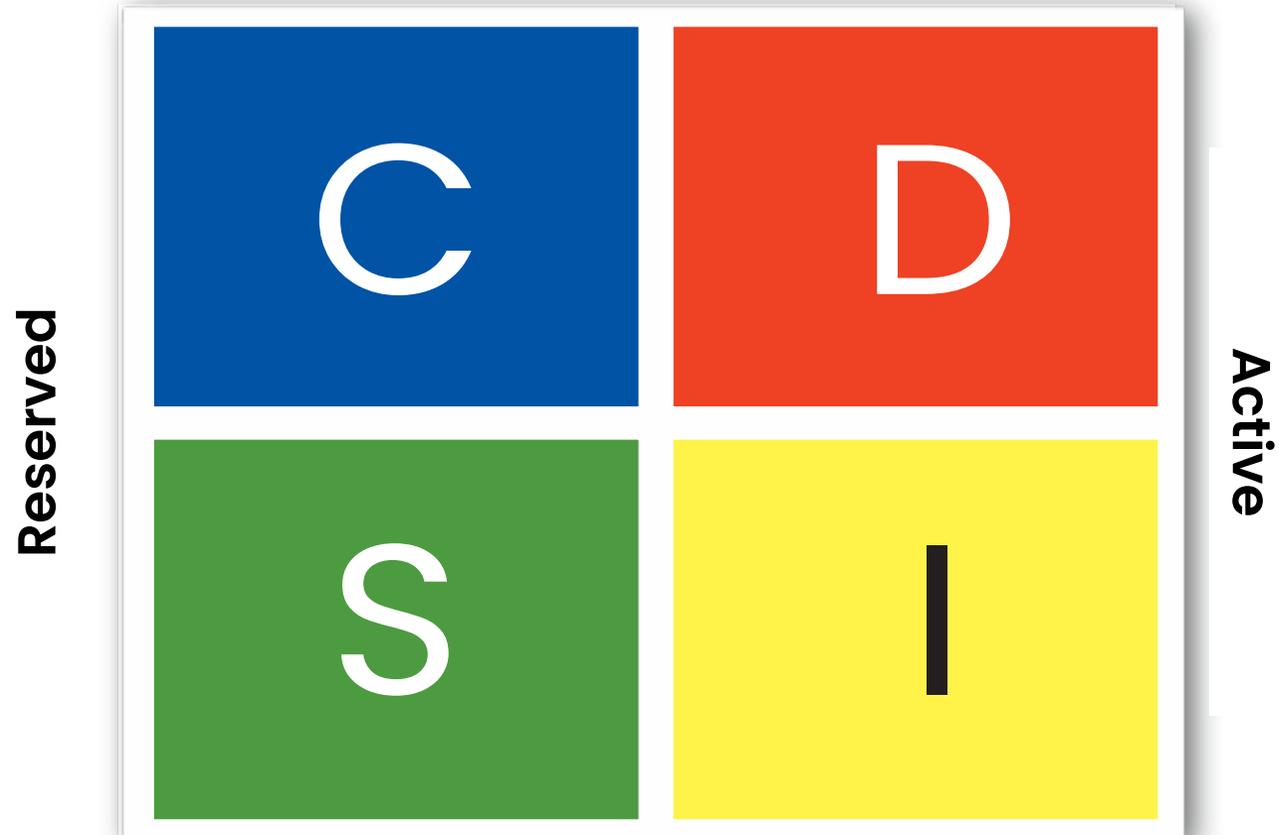
LinkedIn Levers

5-3-1



Creating Chemistry with DISC

Task-oriented



People-oriented

30-Second Commercial Example

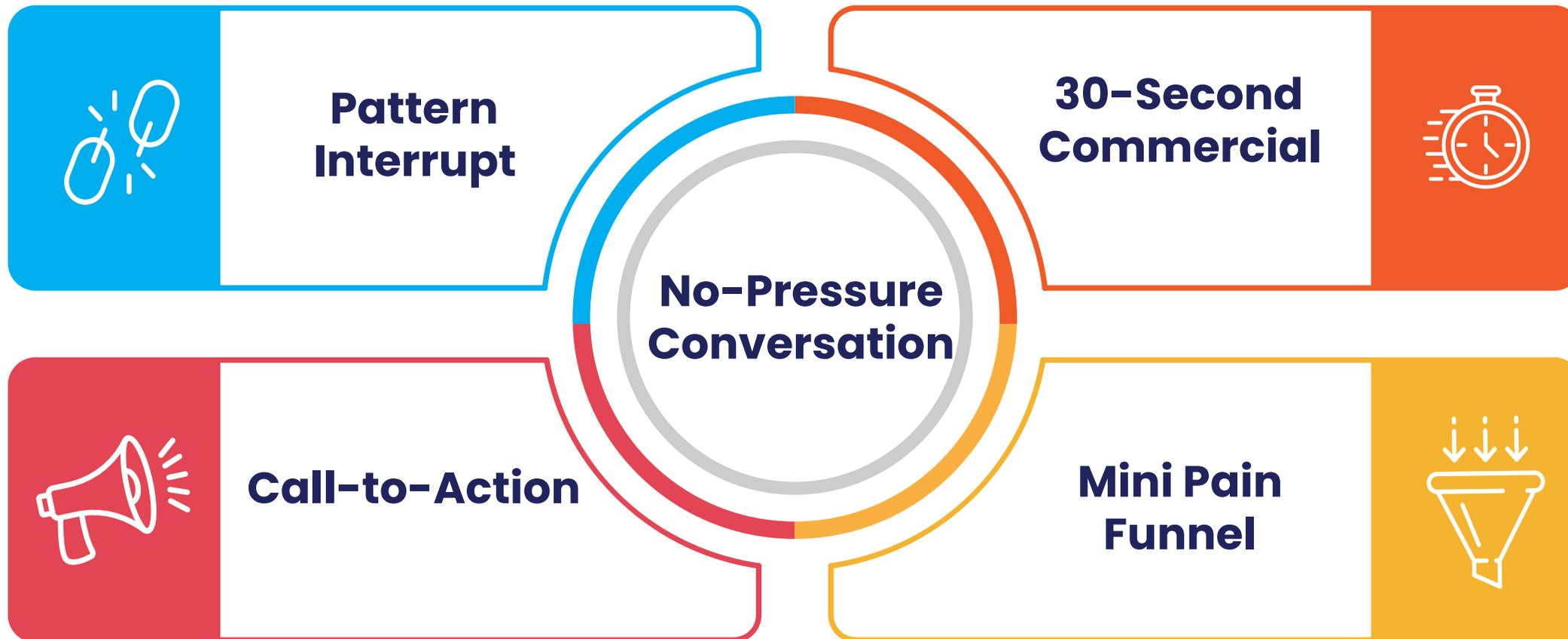
My name is [Lucy Lafferty with MegaMultiMedia](#), a print and broadcast media advertising agency.

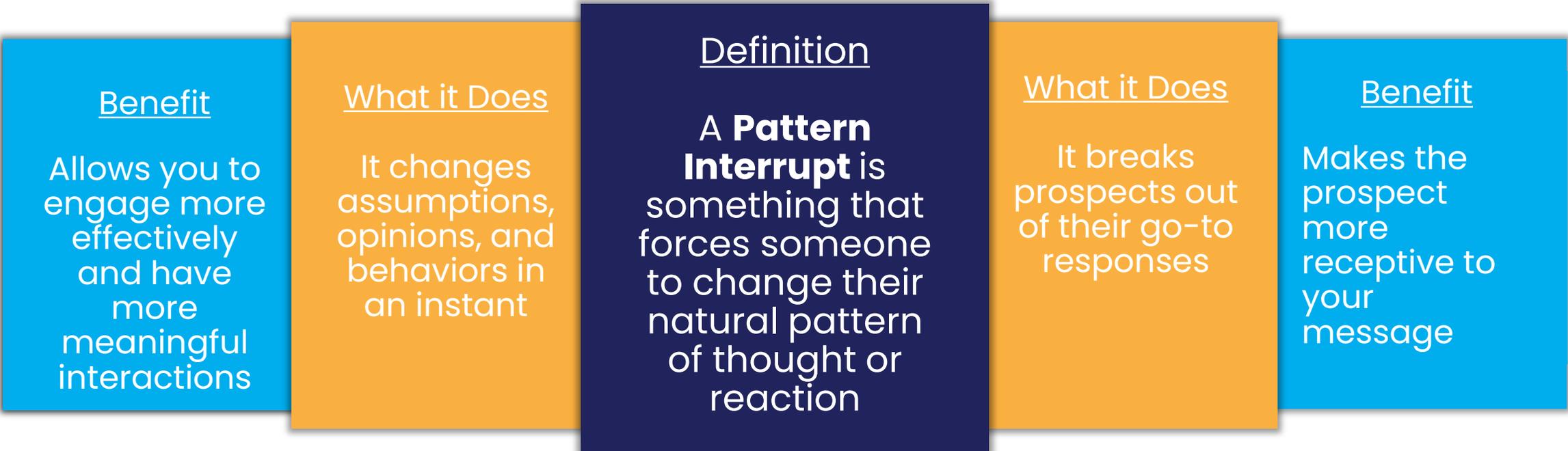
I work with independently owned furniture stores that typically have a large customer base of loyal, repeat customers. [Some are frustrated](#) by seeing growth plateauing due to: their inability to attract new first-time buyers, or their customers are buying but not as frequently, or they want to see their order size increase.

Our clients have been able to [increase traffic of first-time buyers](#) and improve order sizes without the need to increase their advertising budget.

Let me pause here. [Is anything I said worth a 2-minute discussion?](#)









Bad Time?

“Did I catch you at a bad time?”



Looking for Help

“I’m looking for some help, I’m not even sure it makes sense for us to talk.”



Name and Wait

“Hey Esme, it’s {your name} from {your company}.”
Then wait.



It’s a Cold Call

“If I told you this is a cold call, would you hang up?”



Referral

“Arely thought it might be important to speak. I promised I’d reach out to you.”

3 Styles to “Experiment” With

1. **Radical Honesty:**

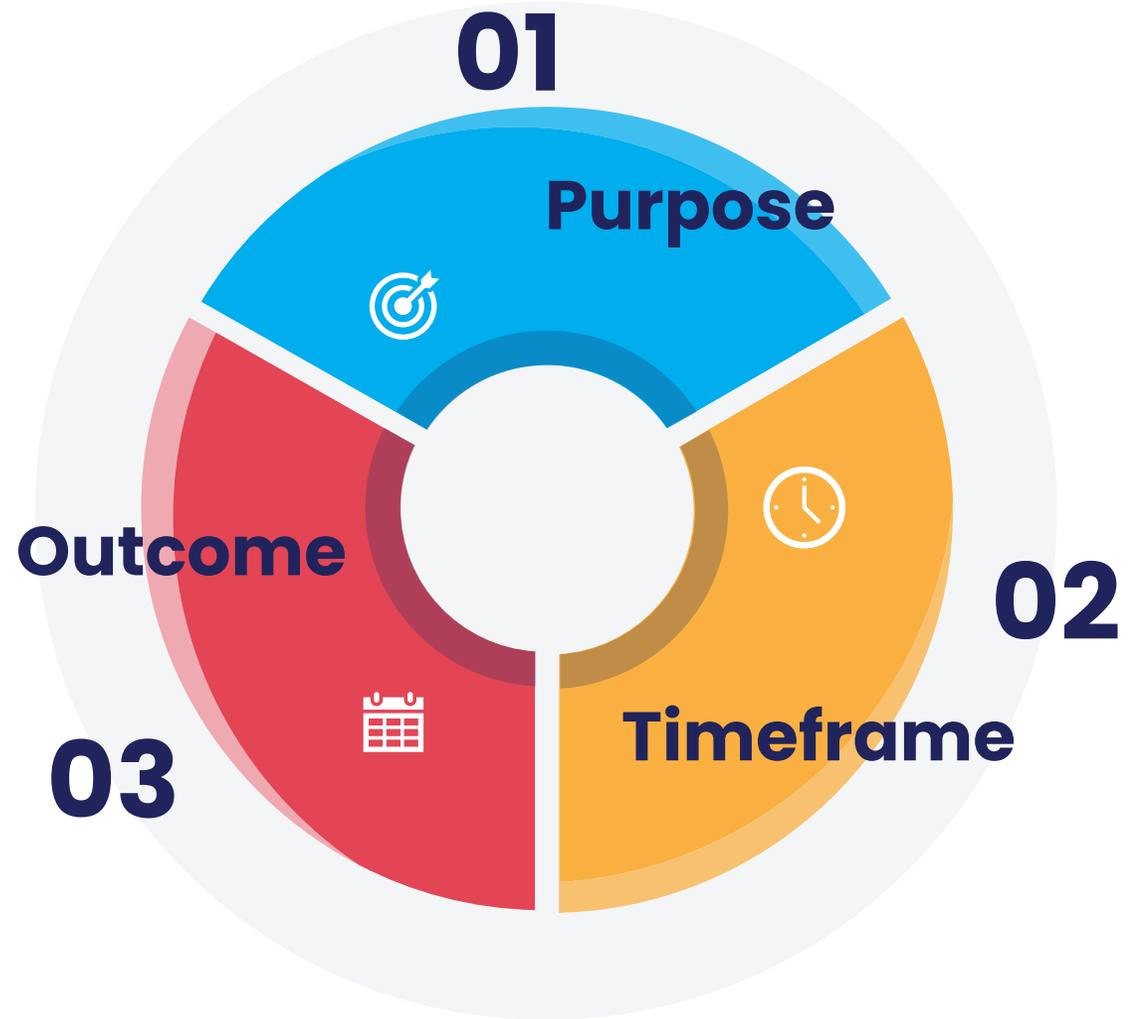
- "This is a cold call. Want to hang up or give me 30 seconds?"

2. **Unusual Question:**

- "How are you handling _____ without losing your mind?"

3. **Humor/Empathy:**

- "Another annoying salesperson today - mind if I try to be different?"

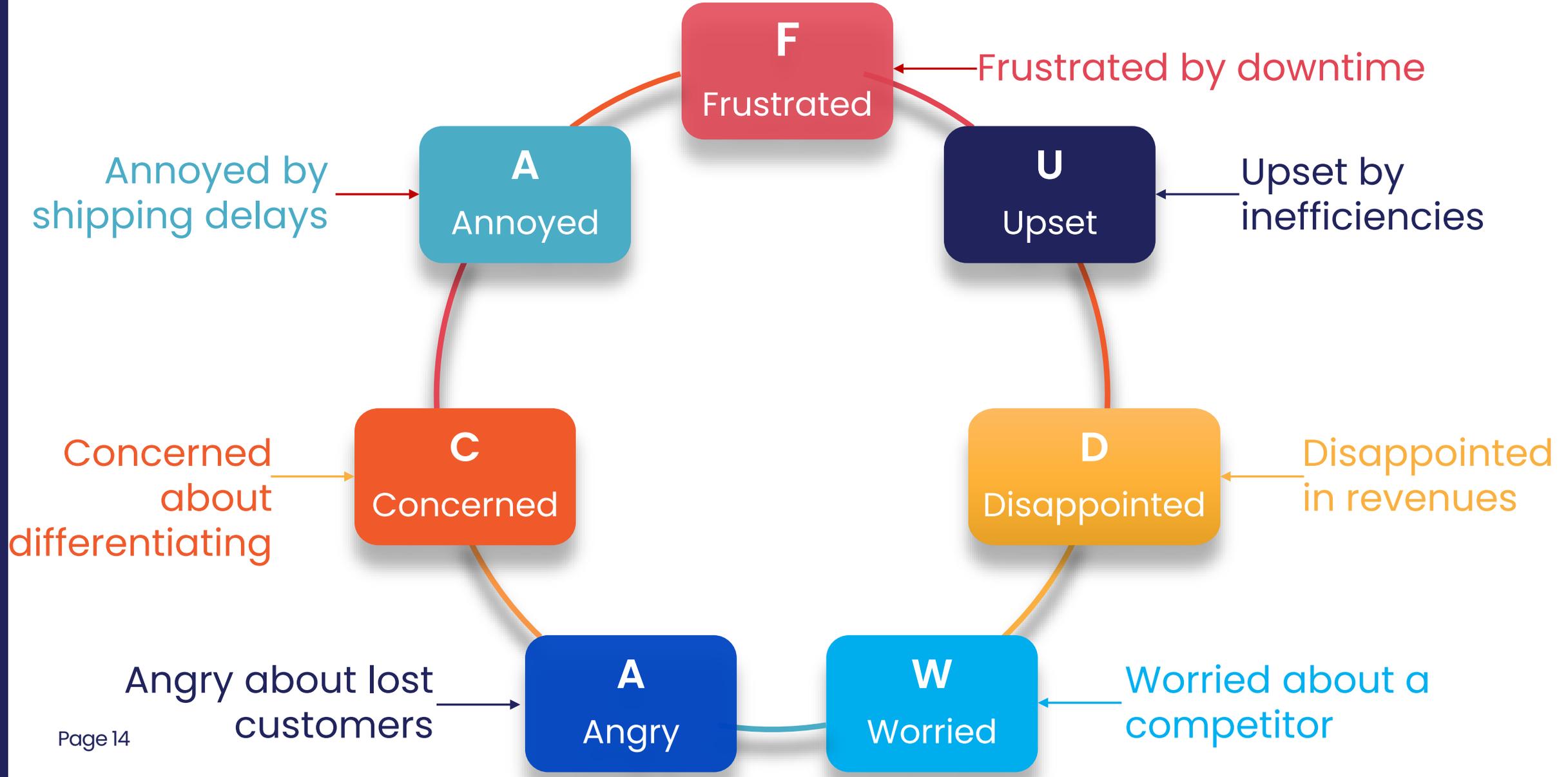


Tim, let me tell you the reason why I'm calling. Then, you and I can decide if it makes sense for us to sit down together at some point. Fair enough?

Let's do this. Let me take 30 seconds to share the purpose of my call and you can be the judge of whether we talk further.

I'd like to take 30 seconds to tell you the purpose of my call, and then you decide whether or not we go any farther. Ok?

Omar, I'm reaching out to you for two specific reasons. Let me share them with you, and then you can decide if it makes sense to have a 3-minute conversation.



Partner Activity – 2 Minutes

- **Why should we work with R&S?**
- **What makes you better than _____?**
- **Tell me more about _____?**
- **Why should we switch from _____ to you?**

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What games
did we all play
growing up?

Marco Polo

Fish out of water?

Monopoly

Free parking? Rob the bank?

Pool (Billiards)

How did scratching work?

Ping Pong

Loser Serves? Can't lose on a serve?

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Adding control and predictability to your meetings

For the Salesperson and the buyer

Salesperson - Control

Buyer - Clarity

Salesperson - Consistency

Buyer - Comprehension

Salesperson - Competency

Buyer - Candid

Salesperson - Concentration

Buyer - Condensed

An Up-Front Contract:

- Is a **mutual agreement** between the buyer and seller on what will take place during the meeting so that both parties are aligned.
- Builds rapport and promotes **equal business stature.**
- Defines **clear outcomes and future commitments.**
- Is not just a single stage, but throughout the **entire selling process.**



GUIDELINES ON PAIN

“

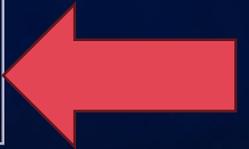
People make buying decisions based on emotion,
then use logic to validate their decisions.

”

People buy to move away from pain or towards pleasure.

“

People (companies) will live with surface pains, sometimes forever.



Emotion Drives Action



Intellectual



Emotional



Motivation to Act

Where to Start?

Rohde & Schwarz selling atmosphere:

- Buyers already assume technical competence
- Features blur together across vendors
- Pain is organizational, operational, programmatic, and political, not technical

Starting with features causes:

- Early solution bias
- Engineering-level conversations with executive buyers
- Difficulty uncovering mission-level risk

Risk → Impact → Visibility → Consequence

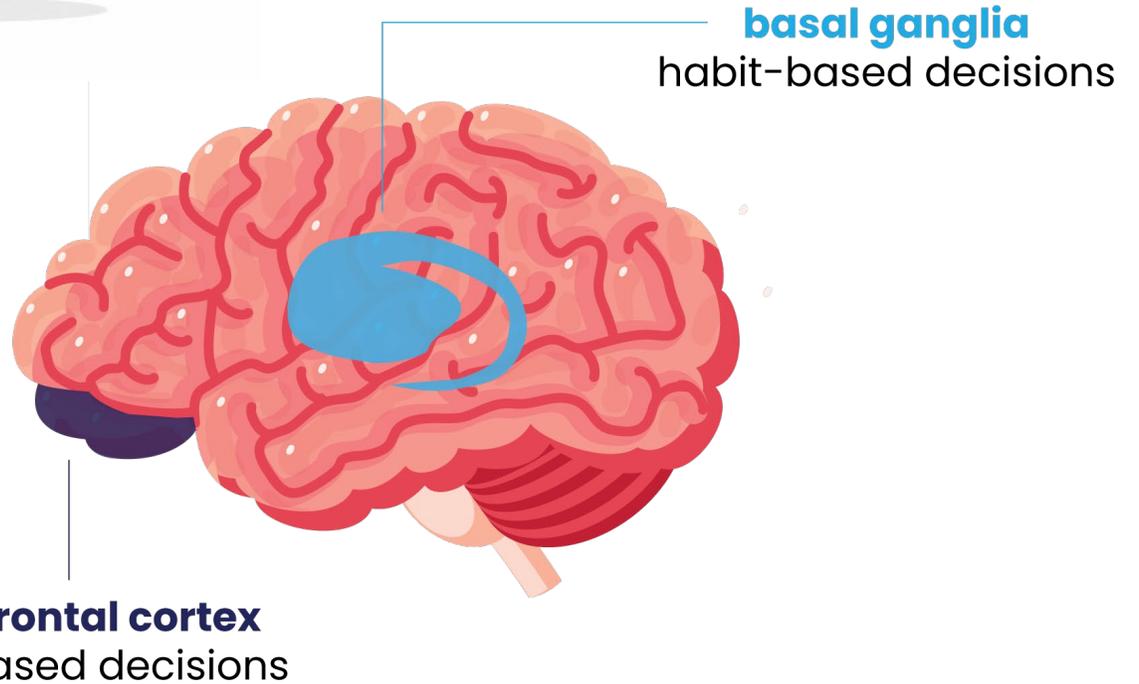
What helps us make better decisions?

EMOTIONAL



VS

INTELLECTUAL



The Pain Funnel Framework



PERSONA



LIM ANAMACTER



MAKINAH PUNYI SIFAT SANGAT BERKUALITAS DAN BERKEMAMUHAN. SIFAT SANGAT BERKUALITAS DAN BERKEMAMUHAN.

MSARMIES



ANATICA



ACIARIS

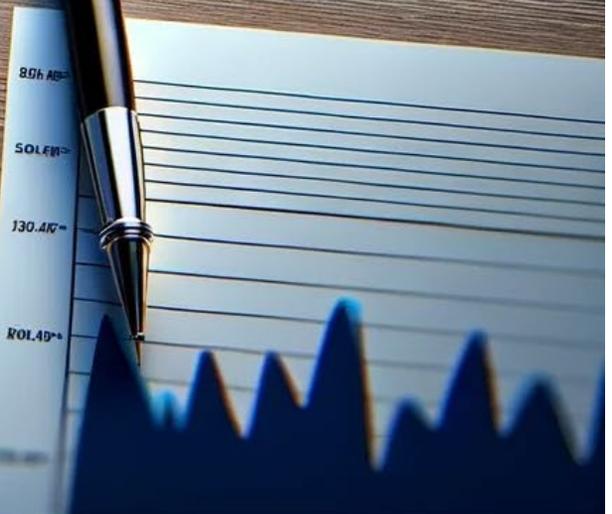
HIZANATOMIS MAMAMTCS



NOHL IZAS



VERGETMEL



One Persona = One Perspective (and That's a Risk)

ASO / EW decisions are never made by one individual.

Each role experiences the problem differently:

- Different priorities
- Different pressures
- Different definitions of “success”

Settling for a single contact limits our understanding – and our ability to win.

To sell systems (not boxes), we must uncover and connect the pains across the buying team.



Buying Committee Overview

Persona	Primary Focus	What They Lose Sleep Over	Influence Level
Chief Engineer / Lead EW Engineer	Technical performance & accuracy	System failure, false results, rework	High
Program Manager	Schedule, delivery, integration	Missed milestones, cost overruns	High
Systems Architect	End-to-end integration	Components that don't scale or integrate	High
Lab / Test Director	Validation & repeatability	Inaccurate test data, lab downtime	Medium
Procurement / Contracts	Cost & compliance	Budget overruns, sole-source risk	Medium
Security / Compliance	Risk & sovereignty	Data leakage, non-compliance	Medium
Executive / Sponsor	Mission success & risk	Program failure, reputational risk	High

Persona-Specific Pain Mapping

Persona	Surface Pain (What They Say)	Real Pain (What They Mean)	Why It Matters
Chief Engineer	"We need higher accuracy"	Fear of mission failure or redesign	One error can compromise the entire system
Program Manager	"We're behind schedule"	Career risk if milestones slip	Delays trigger penalties & scrutiny
Systems Architect	"Integration is complex"	Components weren't designed holistically	Patchwork systems increase failure risk
Lab Director	"We need repeatable results"	Test data credibility is questioned	Bad data = bad decisions
Procurement	"Your solution costs more"	Need justification & defensibility	Lowest cost ≠ lowest risk
Security / Compliance	"We need to meet standards"	Fear of exposure or audit failure	One breach can end the program
Executive	"We need confidence"	Risk to mission & reputation	Failure is not an option

Expanded Discovery Questions – Chief Engineer / Technical Lead

Problem

Impact

Consequence

Where do current test methods fall short?

What happens if accuracy degrades?

How would that impact mission success?

What failure modes concern you most?

How often do issues surface late?

What rework does that create?

Where are assumptions being made today?

What risk does that introduce?

How exposed does that make the program?

Expanded Discovery Questions – Program Manager

Problem

Impact

Consequence

Which milestones are under the most pressure?

What happens if they slip?

Who escalates when that occurs?

Where do dependencies create risk?

How does that affect delivery?

What penalties or scrutiny follow?

What causes the most surprises today?

How disruptive are those?

How do they affect confidence in the plan?

Expanded Discovery Questions – Systems Architect

Problem

Impact

Consequence

Where does integration typically break down?

What does rework cost?

How does that affect scalability?

Which components create the most friction?

How much time is spent compensating?

What technical debt does that create?

What wasn't designed end-to-end?

How does that show up later?

What long-term risk does that pose?

Expanded Discovery Questions – Lab / Test Director

Problem

Impact

Consequence

Where is repeatability weakest?

What happens when data is questioned?

How does that delay decisions?

What causes the most downtime?

How disruptive is it?

What does that cost the program?

How often are results challenged?

What does re-testing require?

How does that impact throughput?

Expanded Discovery Questions – Procurement / Contracts

Problem

Impact

Consequence

Where do contracts create risk?

What happens if terms are missed?

Who is accountable?

What concerns arise with sole sourcing?

How does that affect leverage?

What exposure does that create?

Where has lowest price backfired?

What did it really cost?

How was that decision defended?

Expanded Discovery Questions – Executive Sponsor

Problem

Impact

Consequence

What would failure look like?

What's at stake if that happens?

How visible would it be?

What keeps you cautious here?

How does that affect decisions?

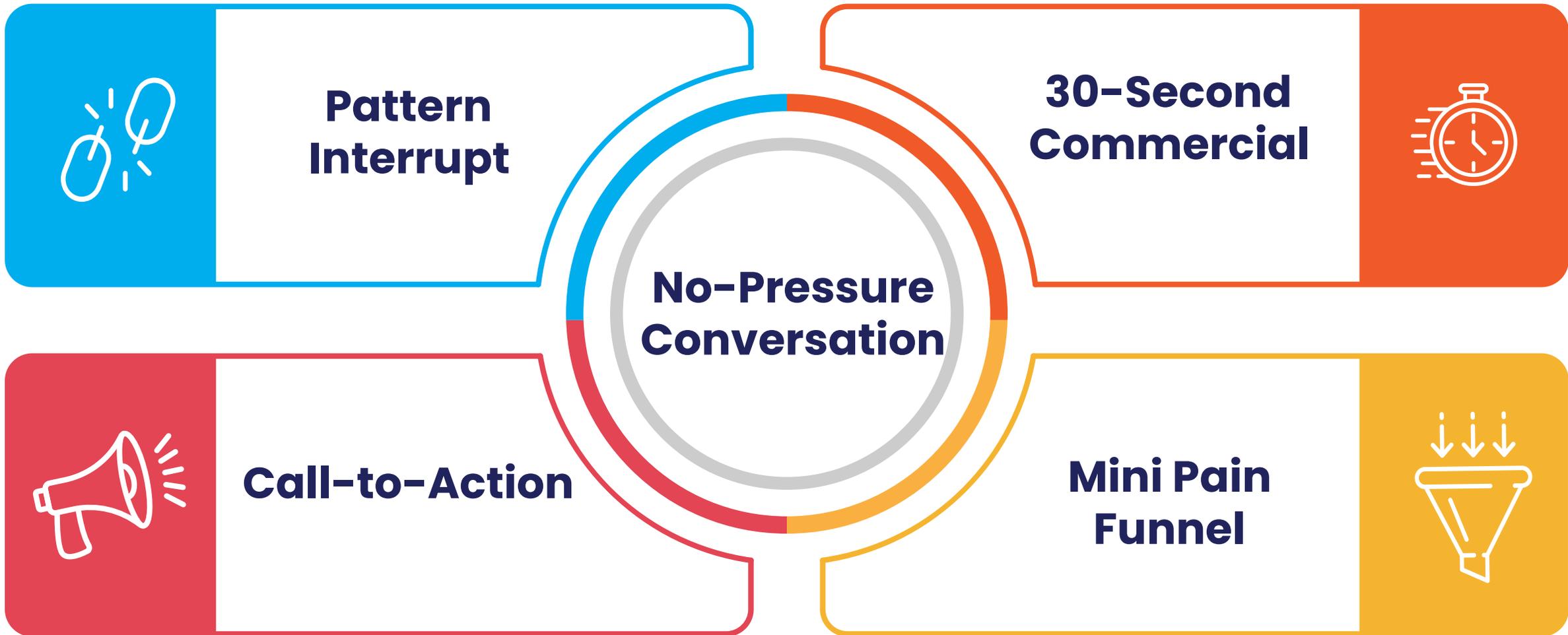
What risk are you unwilling to accept?

What defines success personally?

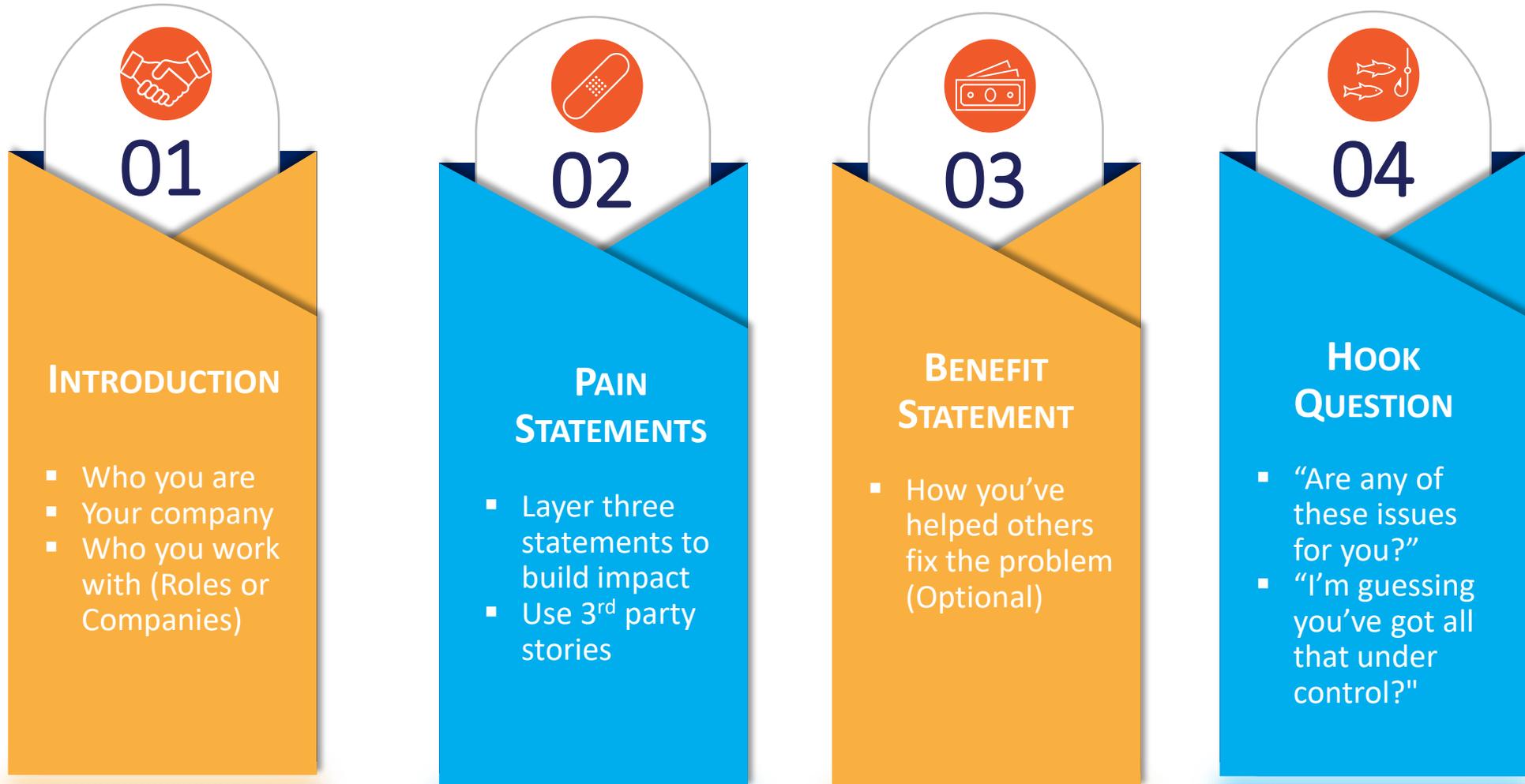
How is that measured?

What happens if it's missed?

Structure of The No-Pressure Conversation



Components of a 30-Second Commercial



Set the Appointment Example

Can I make a suggestion? Why don't we set up another call to do a deeper dive into this issue. Let's take a look at your calendar.

Let's do this. Look at your calendar and let's set up a time for a demonstration.

Here's what I propose. Take a look at your calendar and let's set up a meeting with you and your team to discuss this further.

Here's a suggestion. I know I may have caught you cold. It sounds like this issue is worth exploring further. How are you on time right now?

Stage	No Pressure Cold Call Script
<p>Opening <i>Pattern Interrupt</i></p>	<p>Hi NAME, it's Chris from Rohde & Schwarz. Not sure if you received our emails over the past week or so? RESPONSE Wasn't sure it they caught your eye....</p> <p>Alternate: _____ This is Chris from R&S... Want to be up front with you – this is a sales call. You may appreciate it's not the most comfortable thing to do... introducing yourself for the first time. Fair?</p> <p>Alternate: _____, this is Chris from R&S. We don't know one-another, your name came to me by way of _____ and I thought it might be important to talk.... Did I catch you at a bad time? ** or – I am sure that I am calling you at the worst possible time of the day..."</p> <p>Alternate: _____, this is Chris from R&S. I'm making outbound calls to new contacts, and I thought it would be important that we talk. Did I catch you at a bad time?</p> <p>Alternate: Thanks for taking the call. Pause (ahhh)... Frankly I'm not sure if I should be talking with you or somebody else on your team. Could you help me out (with that)?</p> <p>Alternate: _____ – This is a cold call. Do I have you filled with excitement and anticipation?... Did not think that I would...</p>
<p>Up-Front Contract or *Neutralize Objections Option</p>	<p>_____, would it be ok if I took 60 seconds to tell you why I called, and then you can decide on whether or not we should talk further? (Are you comfortable with that if I stick to that timeframe?) RESPONSE... *Typical response can be "sure," or "ok – but I don't have much time."</p> <p>When I speak to someone in your position for the first time about _____, they often say that they are in good shape with their current vendors and have no interest in making any changes. Is that the case here? Would it be ok if we put this aside for the next 60 seconds and I can tell you why I called - and you can determine if we should talk further?</p>
<p>30-Sec Com.</p>	<p>_____ – not sure if you have worked much with R&S? _____. If No – was not sure if you would have. If Yes – How so?</p> <p>At R&S, we partner with companies like yours to help them _____.</p> <p>John – typically when I talk to <i>folks</i> like you - I often hear them say that:</p> <ul style="list-style-type: none"> • Are frustrated with _____. • They are uncertain if their _____. • They are concerned that _____. <p>(_____, <i>that's my time</i>). I don't suppose that you face these or similar challenges.... Or do any of these apply in your world?</p> <p>"Pain Funnel" Get them involved - then close for the appt. If Yes: "Really... which one stands out? Tell me more..." Why don't we take a few additional minutes to take deeper look....</p>
<p>Close</p>	<p>Thanks for sharing that with me, John. Our next step would be for us to look at our calendars and set up a meeting with _____.</p>
<p>Post sell & next Up-Front Contract</p>	<p>_____, I Appreciate you taking the time to meet next Tuesday at 9:00. I will be bring in our account manager, <u>Justin</u> to this meeting. By the way, can you think of anything that might come up between now and then that would cause you to cancel or postpone our meeting? (only if cancelations are an issue).</p> <p>Naturally during our meeting, we will be asking you more questions about the issues we've been discussing, learn what you're trying to achieve, what's important, what's not.</p> <p>Obviously, you will want to ask me questions about R&S – and learn about what we have done in similar situations. Fair? (Does that make sense?) RESPONSE.</p> <p>Good. And _____, we're certainly not a <u>fit</u> for everyone. Typically, at the end of our meeting one or two things happen. For reasons big or small, you may feel we're not a <u>fit</u> at the present time. If that's the case, are you comfortable telling me that? (It won't hurt my feelings; I won't take it personally.) RESPONSE</p> <p>Good. Thought that to be the case. Equally important, if you think there might be a fit, something worth continuing to explore beyond our meeting, we will take the last few minutes of the meeting to determine what those next steps look <u>like</u>? RESPONSE.</p> <p>Thanks _____, I look forward to our meeting next Tuesday at 9:00 am. Take care.</p>



Set the Appointment: Make it Stick

Set the Appointment



01

CALENDAR INVITE

- Send an invitation
- Ask prospect to send you one

02

HOMEWORK

- Gather data
- Invite others

Components of a Big Up-Front Contract





zoominfo

- Who uses ZoomInfo daily?
- Who uses the Intent tab weekly?
- Who has ever changed outreach behavior based on intent?
- Who uses intent to prioritize accounts, not just find names?

Small Group Best Practices

Group A – Targeting & Prioritization

How do we decide who gets contacted first?
What intent signals matter most in project-based, capital equipment sales?
What's noise vs. signal?

Group B – Messaging & Outreach

How does intent change:

- Subject lines?
- Call openers?
- LinkedIn messages?

What NOT to say when you see intent.

Group C – Sales Process Integration

Where does intent fit in the sales process?
When should intent trigger:

- Immediate outreach?
- Multi-channel sequence?
- Field escalation?

Small Group Best Practices

ZoomInfo + Intent Best Practices

- Use intent to prioritize, not pitch
- Combine intent + role + recent trigger before outreach
- Treat intent as a conversation opener, not proof of interest
- Align outreach to buyer role, not product
- Use intent to justify *why now*, not *why us*
- Intent tells us when to engage, not what to sell.

Intent-Based Call Openers

Bad (Pitchy / Wastes Intent)

“We saw you were researching signal monitoring solutions and wanted to tell you about our platform.”

Better (Curiosity-Based)

“We work with teams who start researching this area when something operational changes internally. What prompted the timing on your end?”

Elite (Credible + Low Pressure)

“When organizations start looking into this space, it’s often tied to upcoming programs, integration challenges, or increased scrutiny. Which of those, if any, sounds closest?”

Why it works:

- No mention of ZoomInfo
- No product talk
- Invites insight, not defense

LinkedIn Message – GOOD

“Hi [Name], noticed your team has been active in this space. Would be open to connecting.”

LinkedIn Message – BETTER

“Hi [Name], I work with teams navigating complex technical decisions in this area. Curious what’s driving interest internally right now.”

LinkedIn Message – ELITE

“Hi [Name], when organizations at your scale start exploring this area, it’s often tied to an upcoming decision or operational pressure. Happy to compare notes if helpful.”

Rule to reinforce:

Intent earns you *relevance*, not *permission to pitch*.

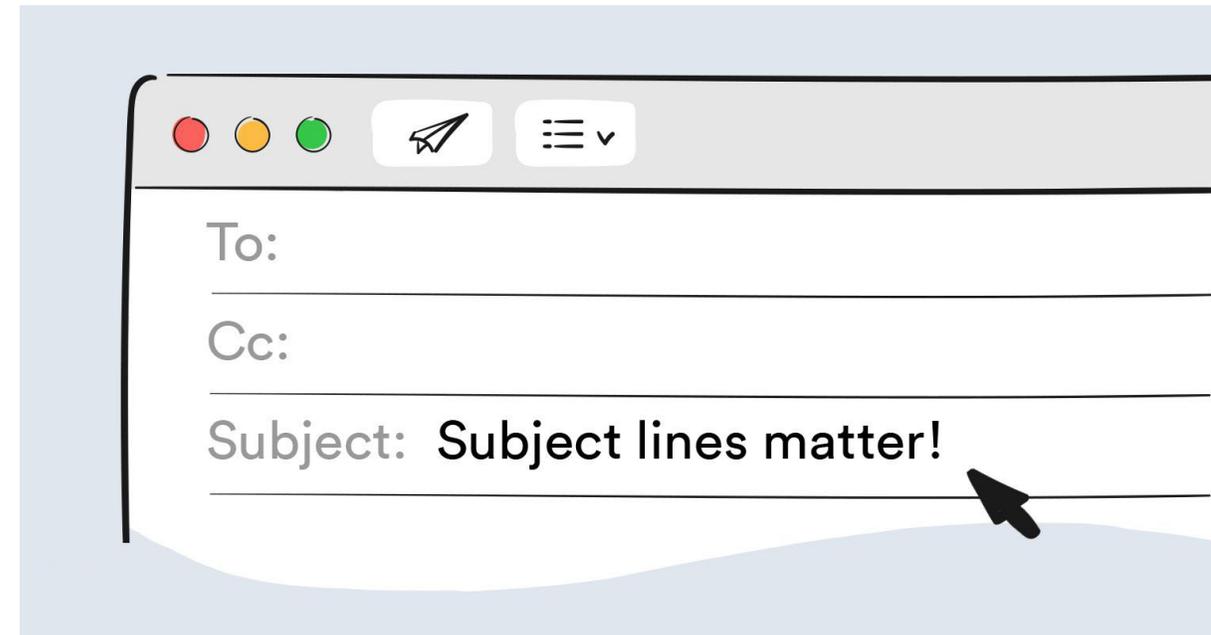
Intent-Driven Email Subject Lines

- Quick question on timing
- Seeing this more often... Curious if it applies
- Pressure or planning?
- Exploring vs. evaluating?

Short....

Human....

Non-salesy....



Where Intent Fits in the Sales Process

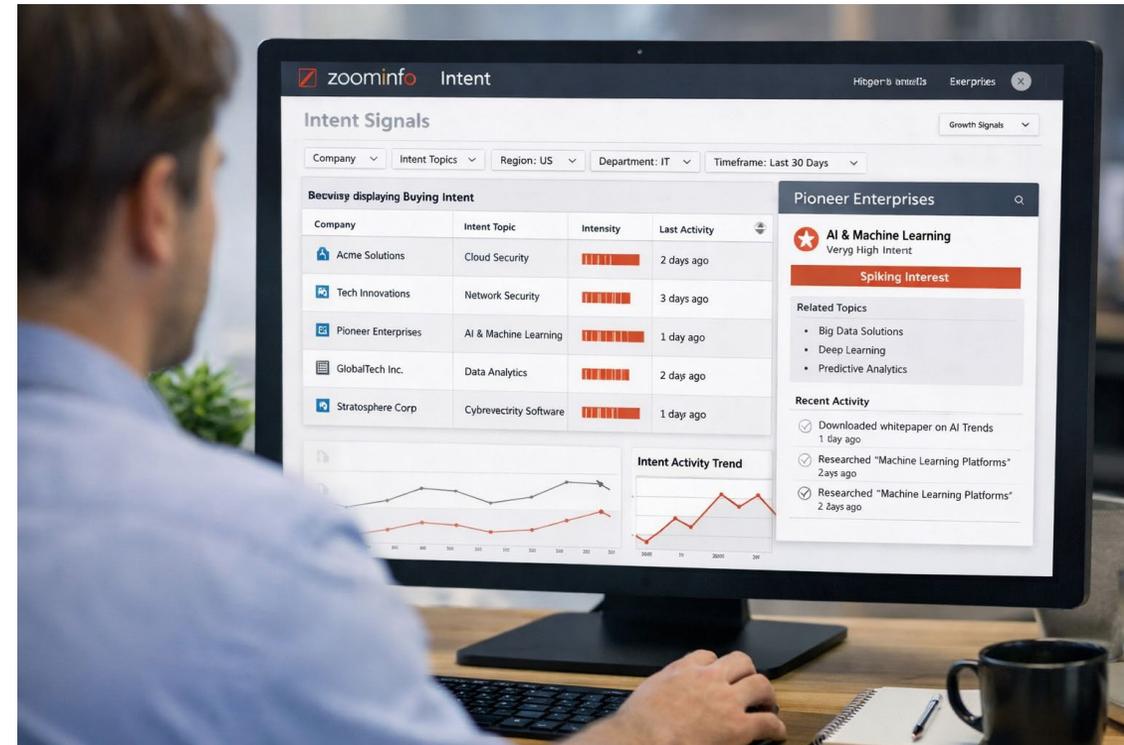
Intent Is Used to:

- Prioritize accounts
- Adjust messaging
- Decide **when** to engage
- Shape discovery questions

Intent Is NOT Used to:

- Claim interest
- Assume budget
- Push demos
- Skip qualification

Intent tells us *when* to talk, not *what* to sell.



ZoomInfo Intent Playbook

STEP 1: Filter Smart

- Industry + account size
- Buyer role
- Relevant intent topic
- Recent activity (last 30–60 days)

STEP 2: Ask “Why Now?”

Before outreach, answer:

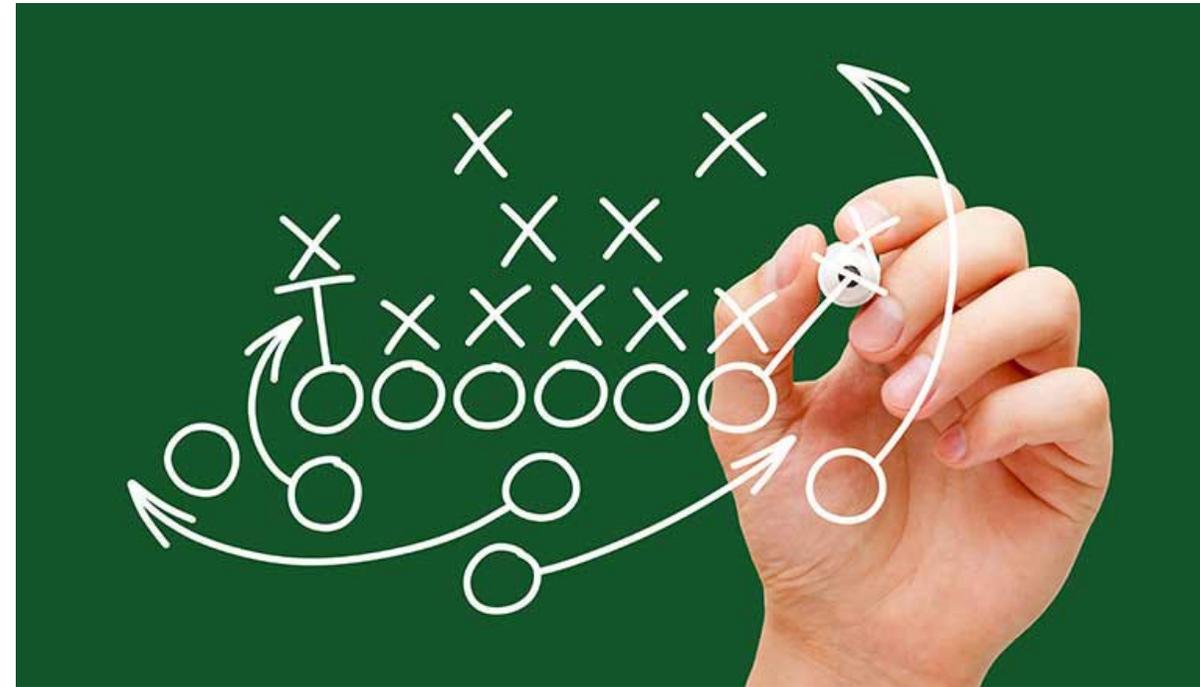
- What *might* be changing internally?
- Who would feel pressure from this?
- What risk might they be trying to reduce?

STEP 3: Choose the Channel

- High intent + senior role → Call + LinkedIn
- Moderate intent → Multi-touch sequence
- Early signal → LinkedIn first

STEP 4: Open with Curiosity

Never reference tools. Reference patterns



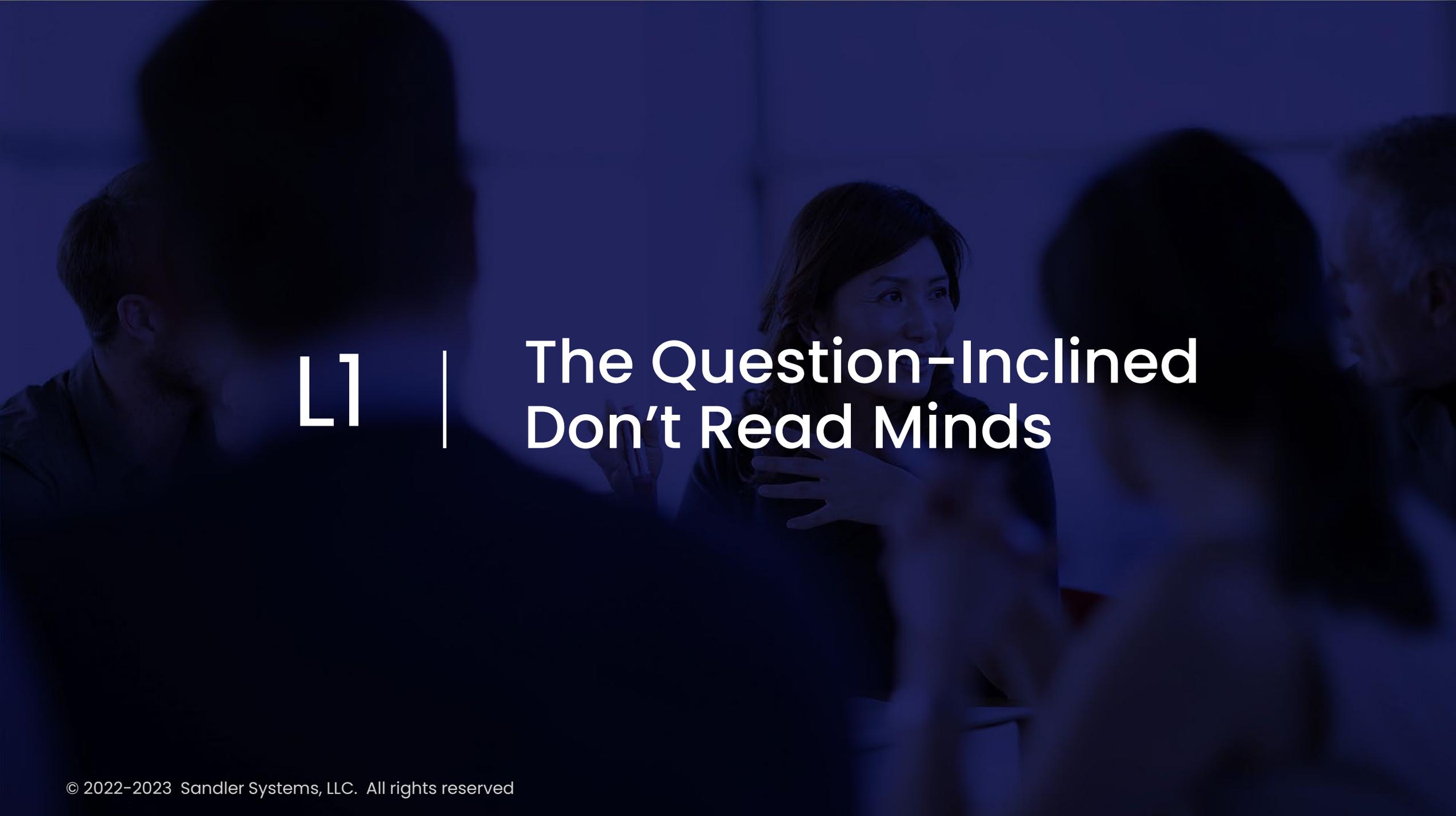
Better Understanding Through Asking Questions

Techniques to Uncovering Issues



What are the common questions that you get asked during an initial call with a prospect?

Write down 2-3.



L1

The Question-Inclined
Don't Read Minds

Learning to **Ask Questions**

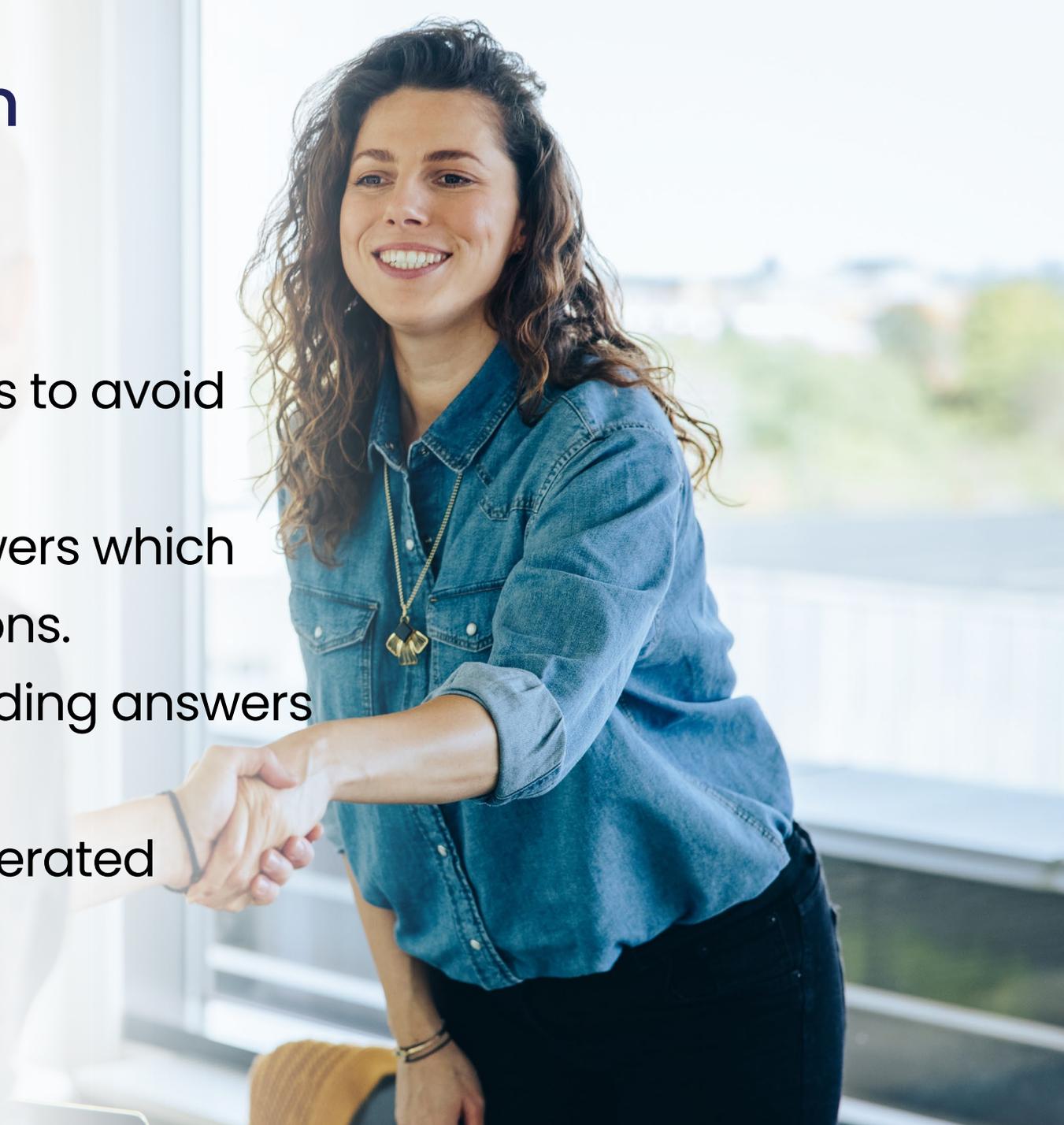




Some Communication Challenges

Buyers might...

- Ask “smokescreen” questions to avoid asking their real questions.
- Provide “smokescreen” answers which hide facts, actions or intentions.
- Give incomplete and misleading answers – sometimes, intentionally.
- Make unsupported or exaggerated statements.



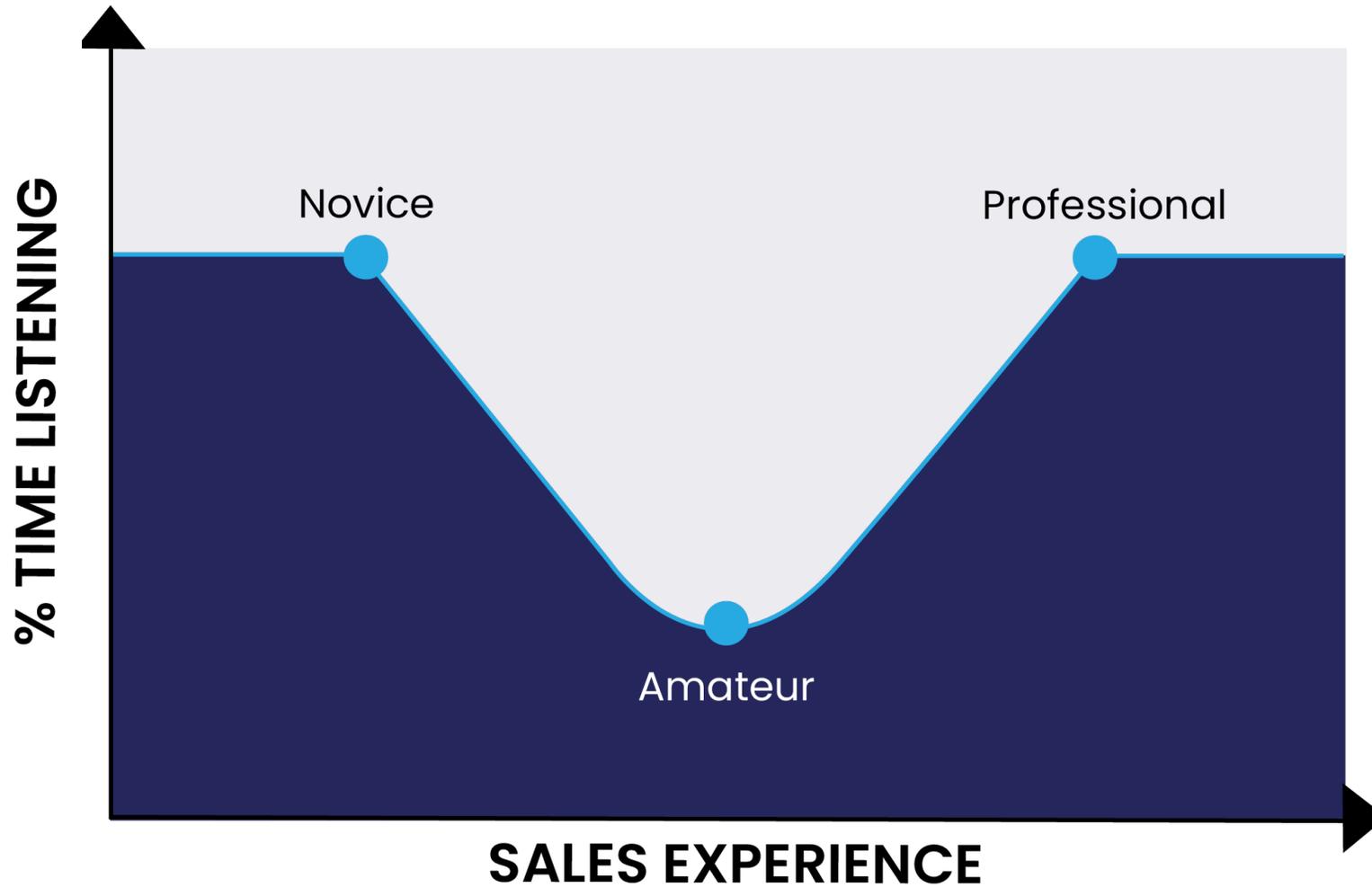
ACTIVITY

Above Board?

Discuss why buyers are not always honest with salespeople.



Curiosity Curve



52 RULES FOR SALES SUCCESS
SANDLER® RULE #36

**The professional does what they
did as a novice—on purpose.**



Curiosity Phrases

Examples

- Tell me more about that...
- Can you help me understand...
- I'm a little confused...
- Let me see if I understand...
- When you say "X", what do you mean by "X"?



ACTIVITY

Dodging Questions

1. With your partner, take turns asking each other questions
 - You should not answer your partner's question
 - Instead, respond with your own question
2. Continue asking questions until someone falls back on habit and answers.

Your response question must be related to the original question.



Reversing

- **Reversing** is answering a question with a question.
- Use reversing to **gain clarity** or safely respond to loaded questions, stalls (objections disguised as questions), or “gotcha” questions.



Reversing Questions

- I'm curious why you ask?
- It seems like that's important to you . . .
- You must be telling me that for a reason . . .
- Is that a big concern for you?
- Can you help me understand that a little bit more?



Begin Reverses with Softening Statements

- **Good question.** I'm curious why you ask?
- **Good point.** So that I'm clear, when you say *X*, what does *X* mean, specifically?
- **Interesting question.** Is that a big concern for you?
- **I'm glad you asked.** It seems like that's important to you . . .
- **I see.** You must be telling me that for a reason . . .
- **I appreciate that question.** Can you help me understand that a little bit more?

What is the difference between R&S and _____?

Reverse – There's probably a reason that you asked?

Menu Question – Typically when someone asks that question it is for one of several reasons....

3rd Party Story – Recently a lot of our clients have been asking about the _____. Is that the case here?

Closed ended – What experience do you have with _____?

Open ended – Happy to discuss that. In order for me to provide that answer, I would need to know more about _____. Can you share with me...

No Mind Reading!

Buyer Says

We're already talking to another solution provider.

We're happy with our current partner.

Your prices are higher than what we're accustomed to.

We can do that in-house or with another vendor.

Salesperson Hears

Why should we consider R&S?

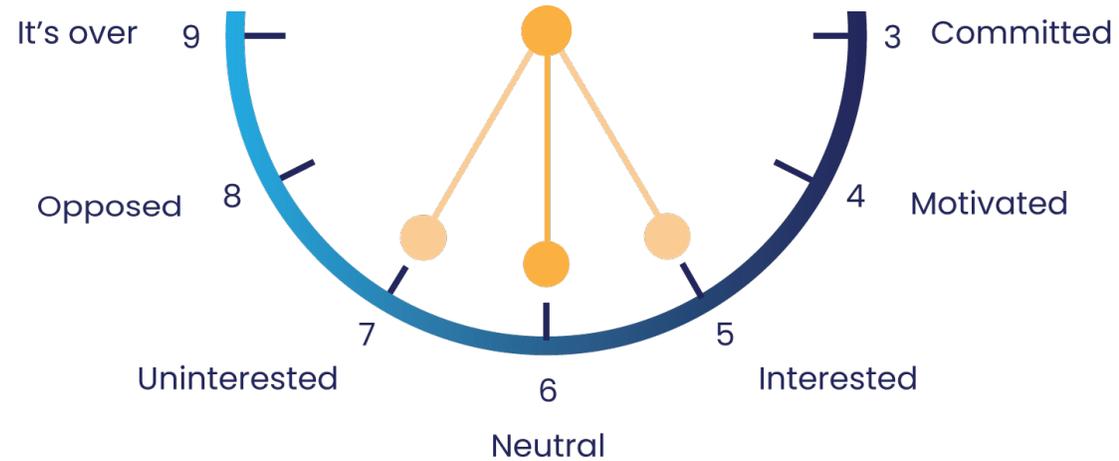
Why are you better?

Can you lower your price?

What can you do that they are not doing?

Pendulum Theory

It sounds like you're happy with your current solution, and there's no reason for you to consider changing.



I don't want to assume what worked for our other customers will work for you.

We work with companies experiencing [specific issues]. I don't suppose you have any of those problems?

Positive Buyer

What They Say

- I've heard some good things from Tom Smith and others about R&S...
- Please send us a proposal because we are very interested...

How we Respond

- Great, I'm glad to hear that. I'm curious - what exactly have you heard?
- Let's assume that I did send you a proposal - what were you hoping to see?

Neutral Buyer

What They Say

- I suppose we would consider working with R&S, but we are ok with our current....
- We are always considering other...

How we Should Respond

- I appreciate that. My guess is you've probably already have a direction that you want to take? Or that it may be easier to stay the current course?
- OK, thanks. I get the feeling that you aren't very interested in looking at new solutions right now, which is fine. Are you sure it still makes sense us to talk?

Negative Buyer

What They Say

- I don't think you have anything different from what we are getting from...
- Why would we consider attempting to work with you all again after the fiasco we went through years ago?

How we Should Respond

- Got it... I'm getting the feeling you've already decided you don't want to look at **any** other options, even if there were a good one, is that right?
- I agree the last time we went down this road that it did not go well. It's probably safe to say that no matter what we have done to correct that issue, you would not consider a discovery meeting again?

Third-Party Stories

A third-party story is a verbal method of expressing your feelings, questions, or suggestions in a way that keeps the buyer from becoming defensive.



52 RULES FOR SALES SUCCESS
SANDLER RULE #4

People don't argue
with their own data.

A

B

T

ATTITUDE

Curiosity Curve / Not-OK

Restate + ASK a Question

"When you say X, can you help me understand what you mean by X?"

Reversing

Soften + ASK a Question

"Good question. Can you tell me how important that is in your overall decision?"

Technique Recap

My Big Concern

Struggle (on purpose) + ASK a Question

"Well... that's certainly one way you could do it. My concern is I've seen others try that and it hasn't had the impact they hoped for. Can I ask you..."

Pattern Interrupt

Shock + ASK a Question

"You're right, we ARE a good bit higher than our competitors. Can I tell you why our clients work with us rather than less expensive competitors?"

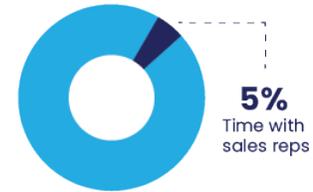
Common Roadblocks



Information Overload



Communication Barriers



Reduced Dependence on Salespeople

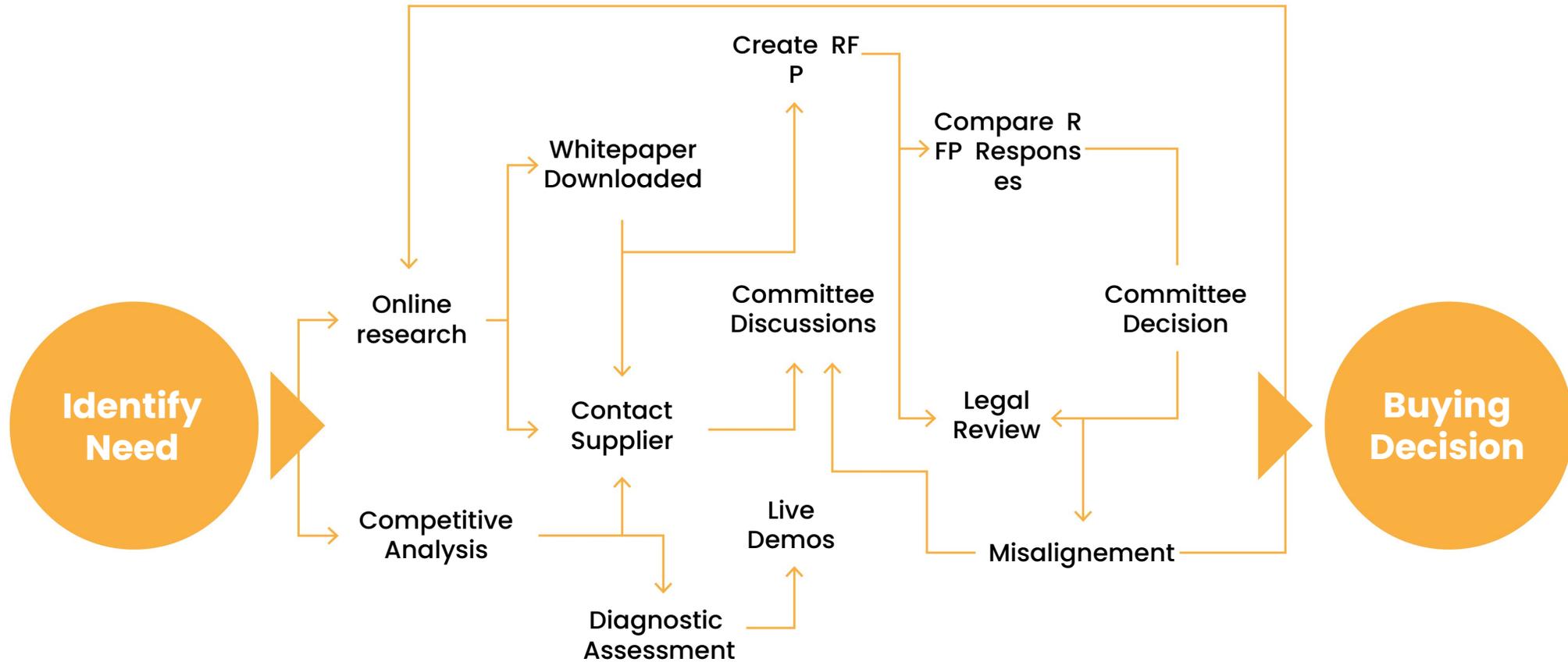


Lowest Common Denominator Purchasing



Organizational Change

Buying Process



Proactive Selling

86% 

A prescriptive approach increases sales by 86% compared to a responsive approach.



Salespeople who make the buying process easier are 62% more likely to win a high-quality sale.

Source: Toman, Adamson, & Gomez, 2020



“

**The expansion of choice has become
an explosion of choice.**

”

—Sheena Iyengar, Columbia Business School professor

Facilitating the Buying Process



Who should be involved?

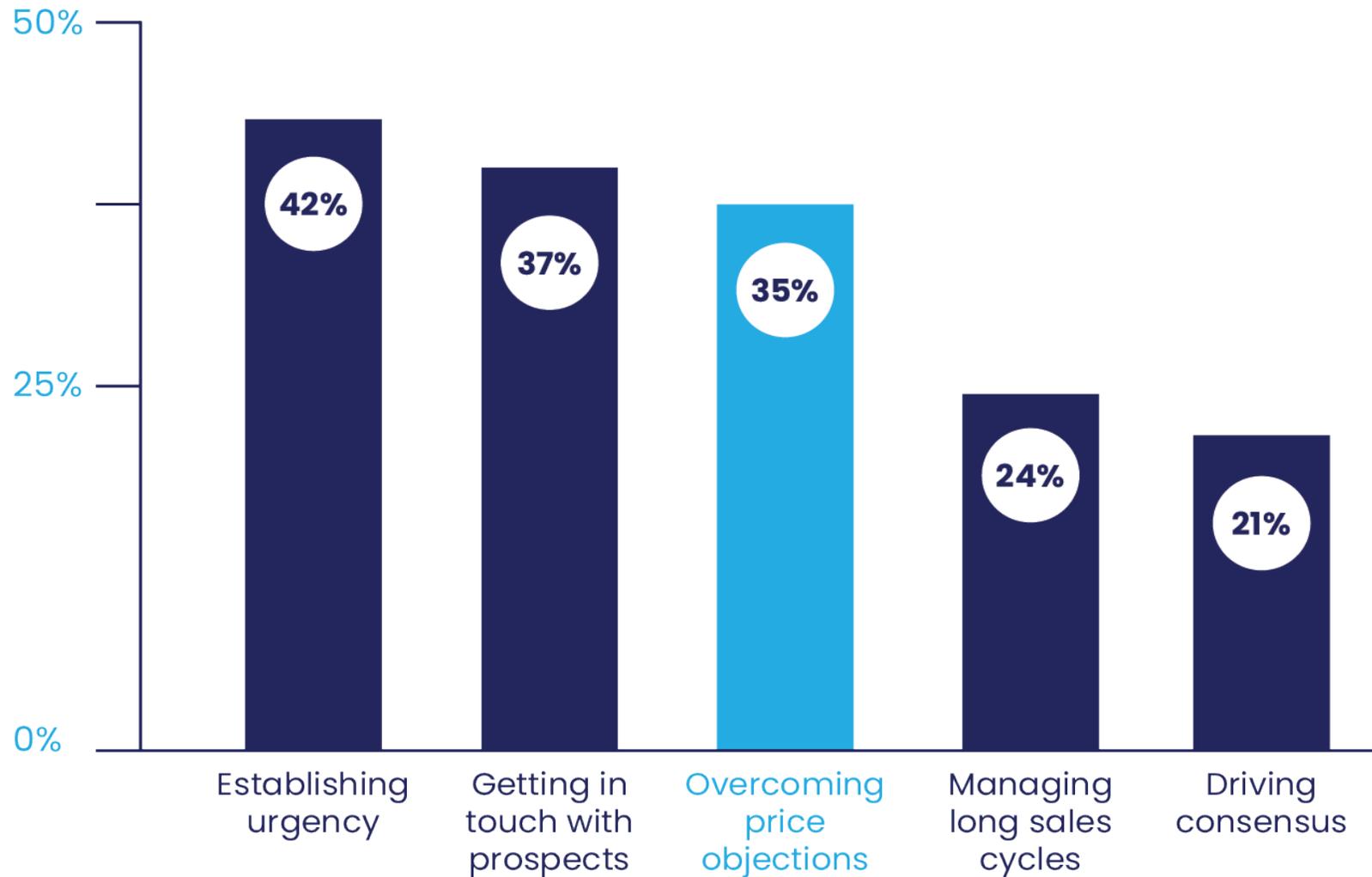


What information does the buyer need?



What actions should the buyer take?

Biggest Challenges Salespeople Face:



Stalls and Objections

1

**Legitimate
reason**

2

**Socially acceptable
objection**

3

**Emotional
defense**

Reversing

- Use a **softening statement**
- Keep it **open-ended**
- Incorporate a **pattern interrupt**
- Use to **expand**, not evade

Page 11

“Thanks for explaining that. You must be telling me that for a reason... ?”

“I’d be surprised if you weren’t already down a path with someone else. What would it take for you to switch vendors?”

Not-OK

- Use Not-OK when **something has changed**
- Ask your buyer to **rescue** you
- If you feel it, **say it**

Page 12



“I’m confused. This had some momentum the last time we spoke, and something seems to have changed. Is this not as big of a priority now... ?”

My Big Concern

- Use when your buyer says something that makes you think **“ruh-roh!”**
- Express **concern** for what may happen
- Incorporate a **third-party story**

Page 13

“I see your point—but here’s my big concern with that.

If we don’t involve Janet early on, we might make 5° pivots now that put us 45° in the wrong direction down the road.

Given that, what are your thoughts? Should we be doing something different here?”

ACTIVITY

Responding to Stalls and Objections

1. In your group, identify **five common stalls and objections** you hear often.
2. Identify which technique to use for each.
3. Document how you would respond to each.

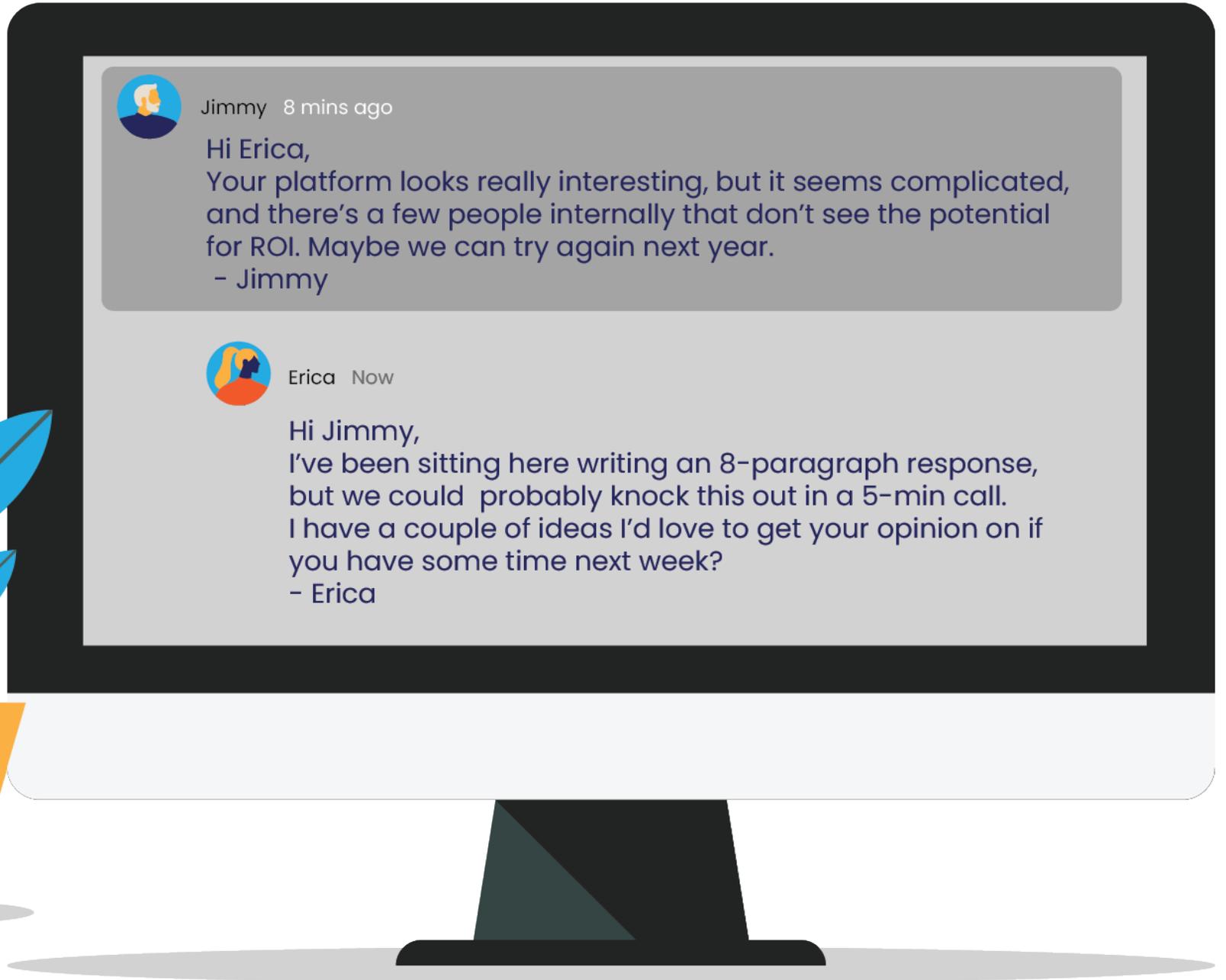


Objection Wheel



1. R&S is too expensive.
2. We haven't worked with you before.
3. I don't know how this will help us.
4. We're happy with our current vendor.
5. I'm not authorized to sign off on this.
6. There's too much going on right now.
7. Your solution is more than we need.
8. I've heard about customer complaints.
9. Your solution doesn't have XYZ feature.
10. We've tried that, and it didn't work.
11. We're downsizing and cutting costs.
12. I can't sell this internally.

Digital Objections



Jimmy 8 mins ago

Hi Erica,
Your platform looks really interesting, but it seems complicated, and there's a few people internally that don't see the potential for ROI. Maybe we can try again next year.
- Jimmy



Erica Now

Hi Jimmy,
I've been sitting here writing an 8-paragraph response, but we could probably knock this out in a 5-min call. I have a couple of ideas I'd love to get your opinion on if you have some time next week?
- Erica

Captivating Attention with Email and Text



8 out of 10

prospects prefer to communicate through email over other forms of communication



Sales reps spend 20% of their day writing emails



41%

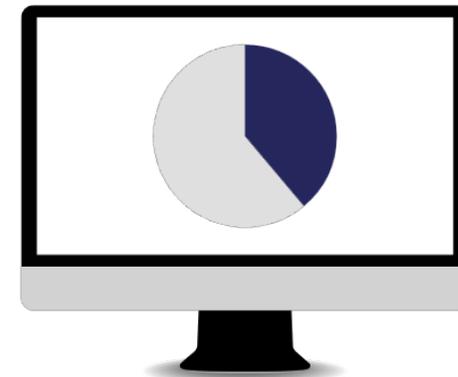
of emails are viewed on a mobile device

40X

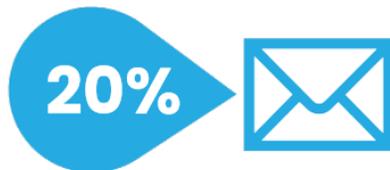
Email is 40X better at acquiring new customers than Facebook or Twitter

6.3

Average working person in the US spends 6.3 hours a day on email



39% of emails are viewed on a desktop device



Average cross-industry open rate is 20%

22%

Personalizing the email subject leads to a 22% increase in open rate

35%

of people open an email based on subject line alone



Page 4

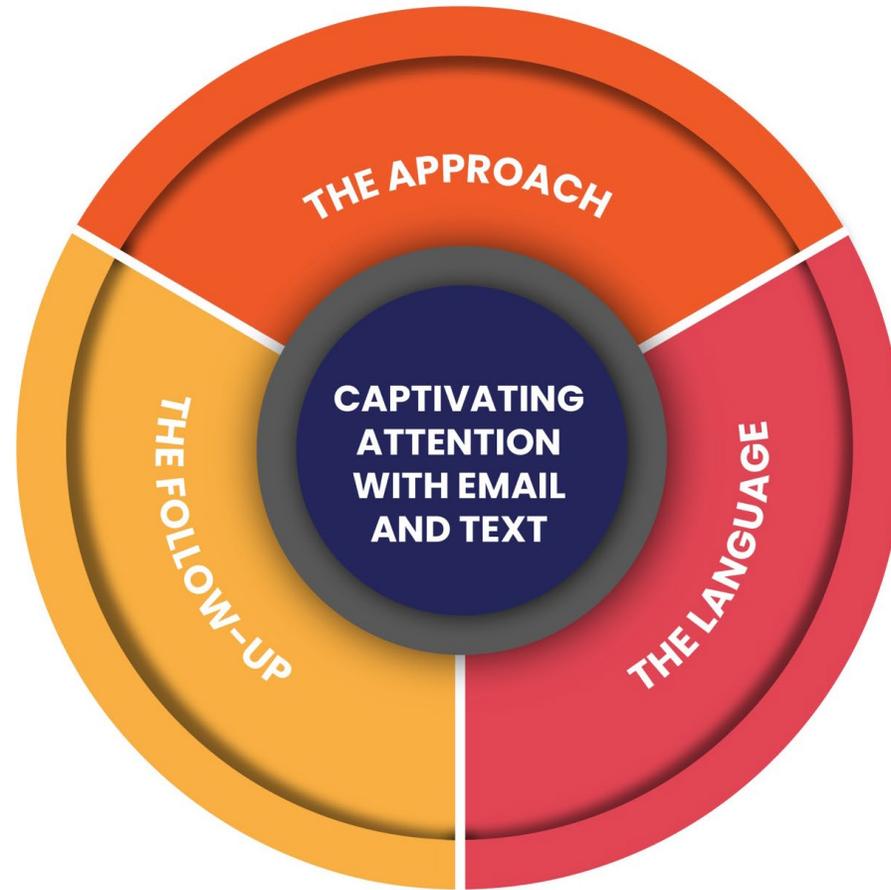
Discussion: Captivating Attention Using Email

In your small group:

- Discuss the challenges you face with captivating prospect attention using email
- Be prepared to share your top challenges with the main group



Captivating Attention with Email and Text – Model



Page 6

How do you think decision-makers might feel when they receive prospecting emails?



The Sandler approach to captivating prospect attention with email ***always*** involves the Pattern Interrupt



Pattern Interrupt Emails



Unexpected by recipient



Unique, stand out from other emails



Fit salesperson's style while still outside of comfort zone



Personalized

Pattern Interrupt Examples



Looking forward to seeing you again this year at Elevate. What are your thoughts on the speakers? I'm interested to hear Megan Tark, CEO Westing...

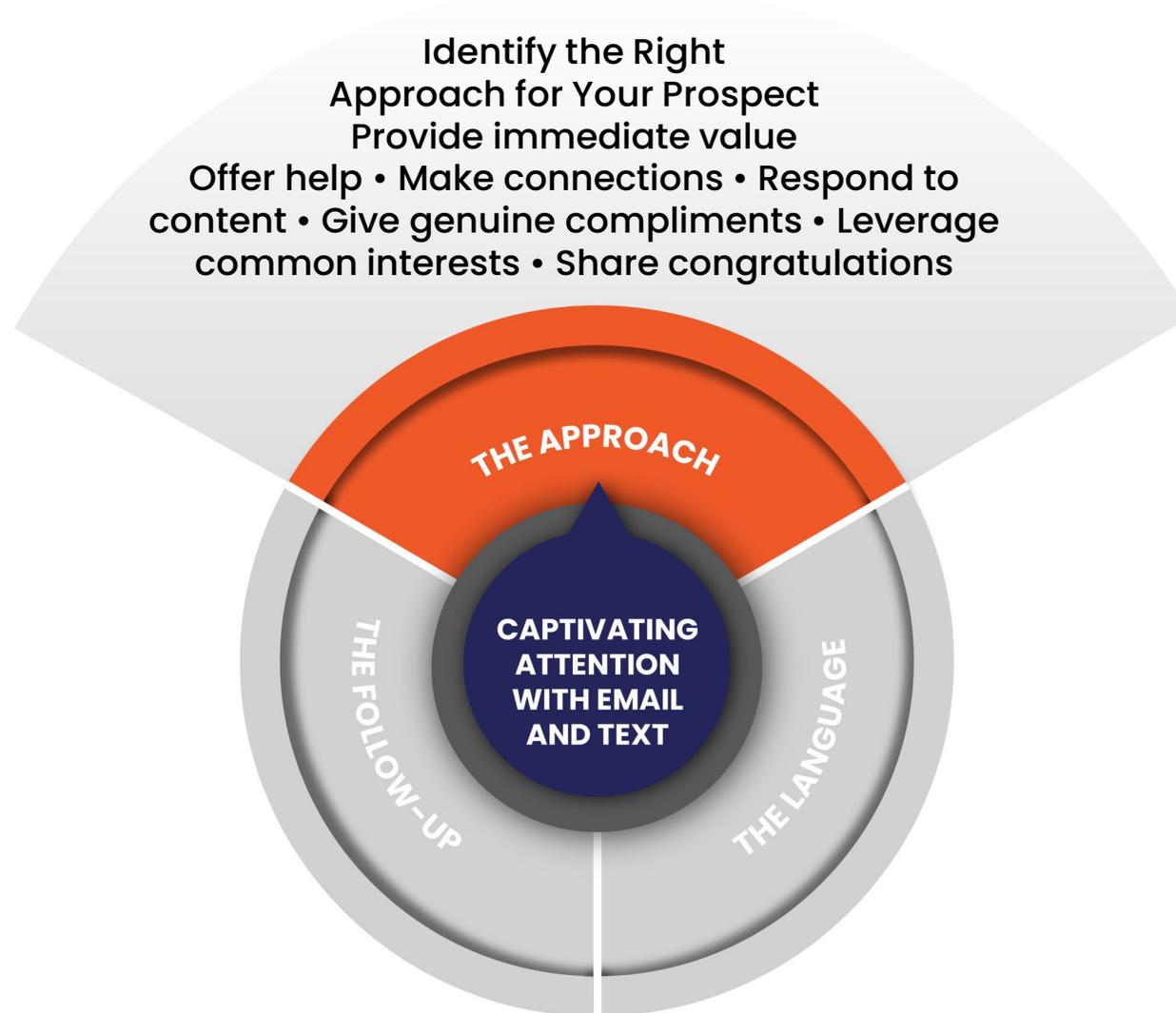


I love your motto, "Help People – Make Money – Have Fun!" It really is that simple, isn't it? I can see you are doing that by helping your clients...



We're connected on LinkedIn, and I wanted to reach out directly about your recent post. The book referenced, "Win Big", has been a complete game changer. I can also see its application to your business, especially...

Captivating Attention with Email and Text – The Approach



The Right Approach

Identify the right approach considering where you are in your prospecting cadence and the information you have about the prospective customer.



Provide immediate value



Offer help



Make connections



Respond to content



Give genuine compliments

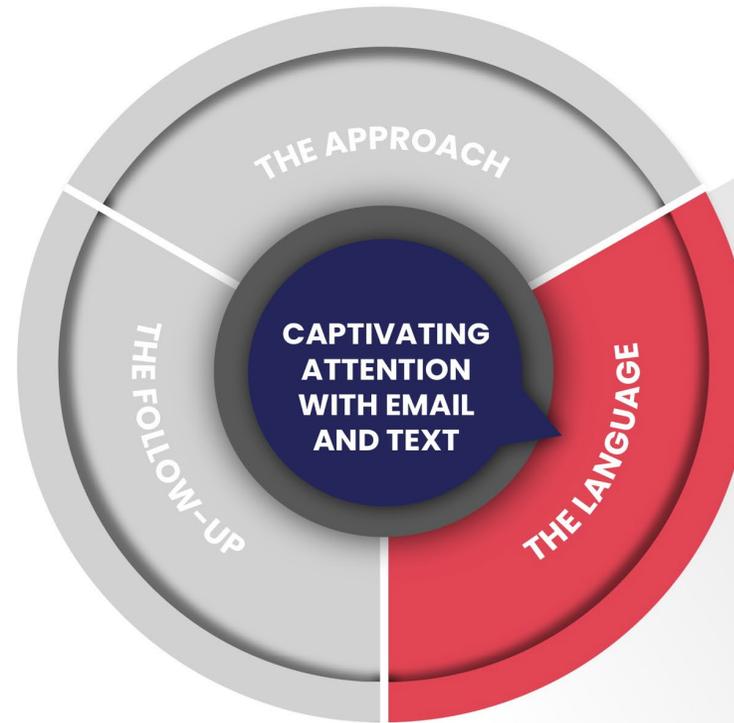


Leverage common interests



Share congratulations

Captivating Attention with Email and Text – The Language



Strong Subject Line

- Personalized
- Concise
- Unique
- Searchable

Body of Email

- Conversational tone
- Personalized
- Focus on customer, not product
- Provide value
- Succinct and well-crafted
- Appropriate white space

Call to Action

- Get prospect to take action
- Placed at end of email

Tool – Email Developer

Prospect Background Information	
Click to add text	
The Approach	
Click to add text	
Strong Email Subject and Body	
Subject	Click to add text
Body	Click to add text
Prospecting Next Steps and Date	
Next Steps	Date
Next Steps	Date
Next Steps	Date

The Approach

- Share congratulations
- Provide immediate value
- Offer help
- Compliment
- Common interests
- Share connections
- Respond to content
- Avoid uncertain content

Strong Subject

- Personalized
- Concise
- Unique
- Searchable

Body of Email

- Conversational
- Personalized
- Focus on the customer, not the product
- Provide value
- Succinct and well-crafted
- Call to Action

Strong Subject Line

The goal of your subject line is to get the prospect to open your email!

Focus on the following criteria for a strong subject:



Personalized – include the prospect's name or company



Concise – catch their attention in a succinct manner

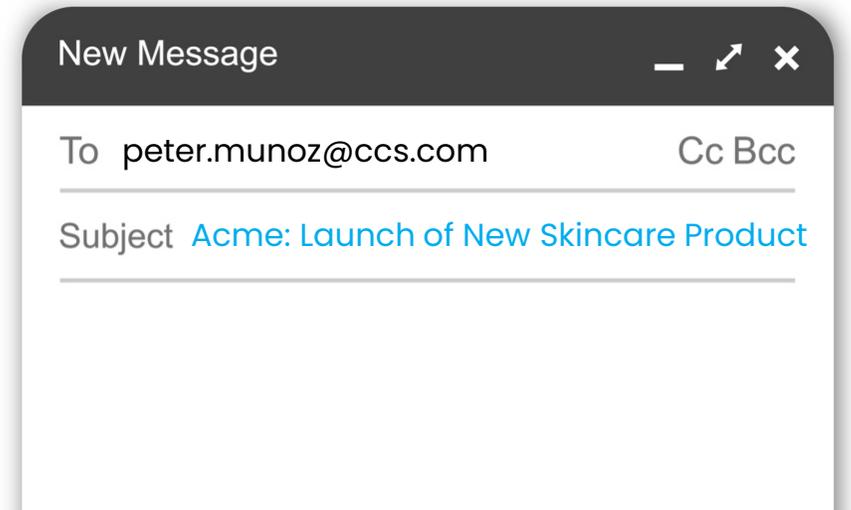
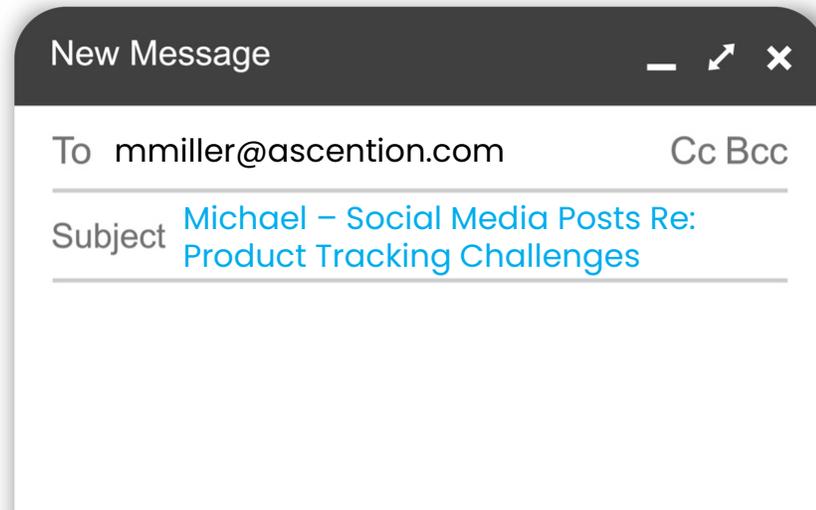
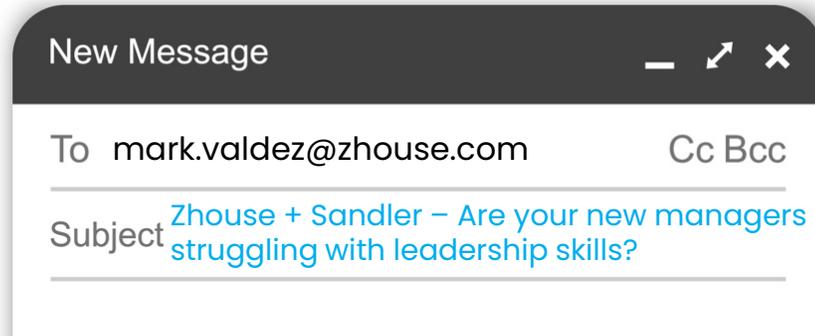
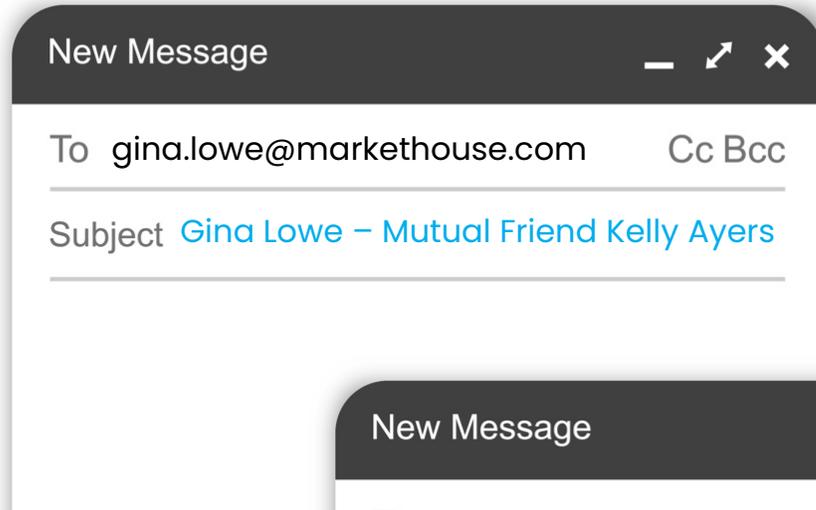


Unique – doesn't look like it was auto-generated



Searchable – contains words that the prospect will remember and can use search feature to locate

Subject Line Examples



Body of Email

The goal of the body of your email is to captivate prospect attention and engage them so that you get a response. Best practices include:

- Conversational tone
- Personalized
- Focus on the customer, not the product
- Provide value
- Succinct and well-crafted
- Call to Action



Provide Value

Provide value focused on the possible needs of the prospect:

- The specific reason you reached out
- Potential benefits of exploring a business relationship
- Results achieved with other companies with similar needs

Succinct and Well-Crafted

This refers to the length and quality of your text:

Succinct:

- Aim for 50-200 words
- Remove unnecessary words and sentences
- Focus on quality, not quantity
- Consider the email being read on a mobile device

Well-Crafted:

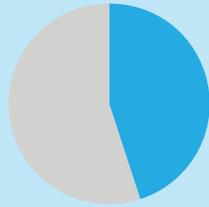
- Customized – tailor your email to your selected approach and the specific prospect and organization
- Quality – check your spelling and grammar
- Readability – ensure there is sufficient white space
- Clear – email does not leave them uncertain about who you are or what value you can provide



Email Follow-Up Statistics



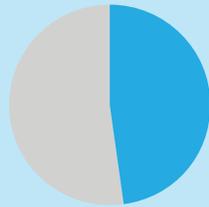
60%
of prospects say no **four times** before saying yes



44%
of salespeople give up after **one** follow-up



80%
of sales require **five** follow-ups



48%
of salespeople **never** make a single follow-up attempt



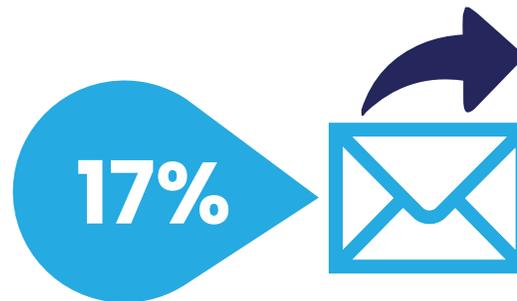
The number of emails in a sequence and reply rate

1-3  = **9%** 

The number of email in a sequence Average reply rate

4-7  = **27%** 

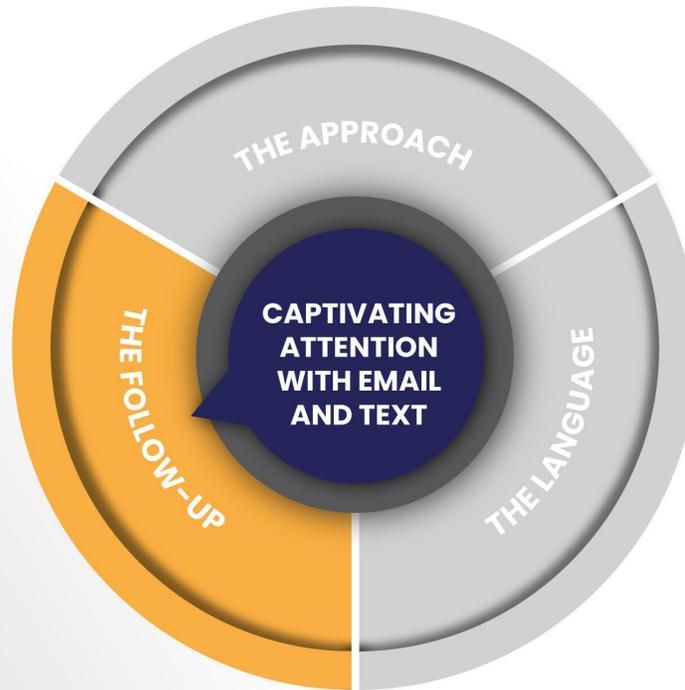
The number of email in a sequence Average reply rate



Sending the same contact multiple emails results in a **reply rate over 17%**

Captivating Attention with Email and Text – The Follow-Up

- Create a follow-up strategy
- Continue to add value
- Find organic reasons to reach out
- Consider multimedia
- Consider humor
- Interest CTA
- One-question email

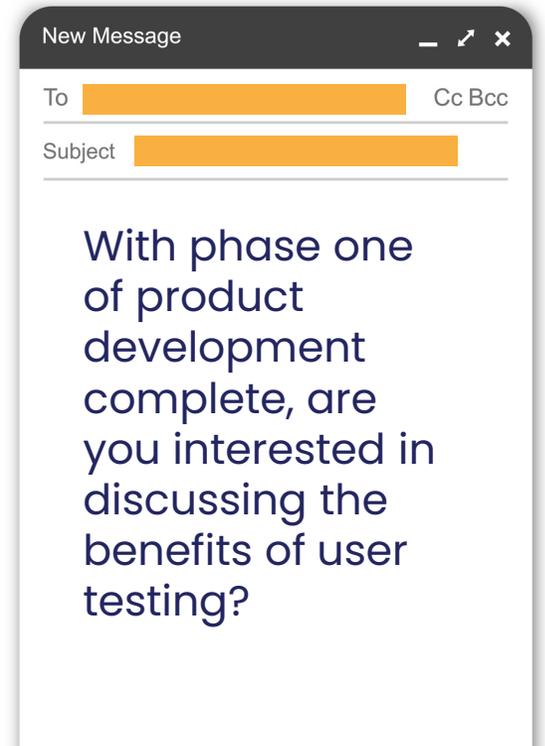
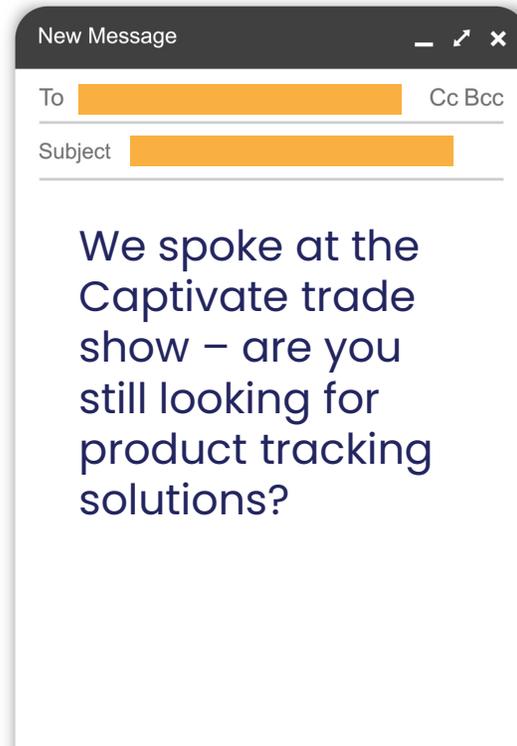
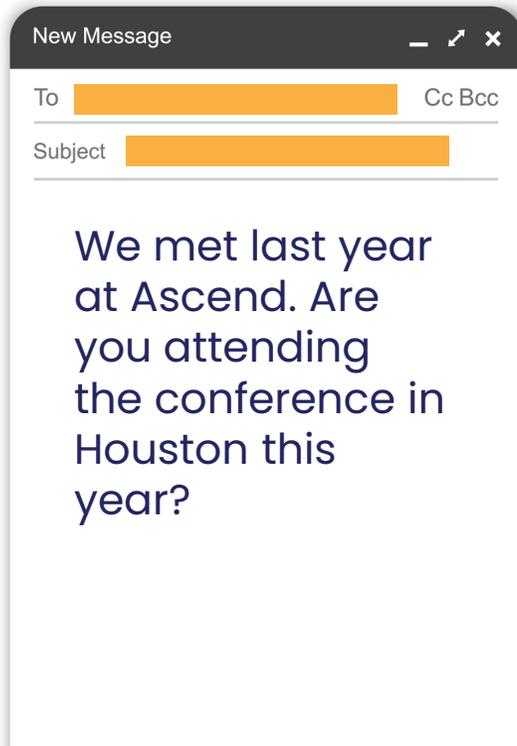
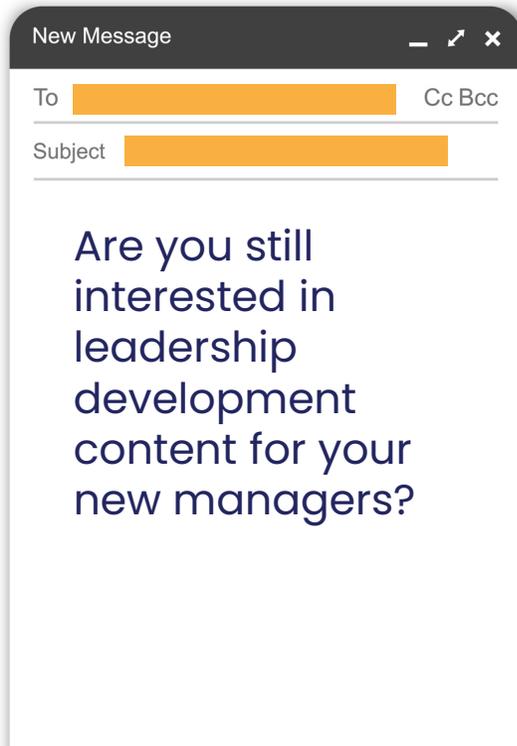


Follow-Up Best Practices

-  Create a follow-up strategy that includes email as well as other prospecting approaches
-  Continue to add value
-  Find organic reasons to reach out
-  Consider a one-question email
-  Consider multimedia
-  Consider humor
-  Interest CTA

One-Question Email

The one-question email is a follow-up email technique that engages the customer with one simple question. This pattern interrupt makes you more human and makes it simple for your prospective customer to respond.



Joe Prospect,

I was looking through my notes and saw your name. I remembered you saying that you were evaluating _____ (fill in what is appropriate for the prospect). I have not heard back from you after leaving a few messages, so I am imaging that either:

- 1) You have decided not to _____ and are staying put with your current HR vendors.
- 2) You are still evaluating what direction to take; however, the solution does not involve Rohde & Schwarz. I am fine with that by the way – as long as you are getting what you need.
- 3) Or, like many, you have been involved in a lot of other ‘things’ that have taken precedence; and have not had time to focus on _____ – and the reward or consequence associated.

There are probably a few things that we can do:

- A) Either the first or second situation above exists – and I should clear this out of my ‘to do’ list. I am totally comfortable with this, and if there is anything else that I can do to help you in your efforts, please let me know.
- B) We set up a meeting to discuss in more detail what you are hoping to accomplish, and determine if we are a resource to help you get there...

Please let me know what we should do... and BTW I am fine with #1 or #2 above.

Regards,

Humor – GIFs and Memes

Humor is a great way to break the ice and allow the prospective customer to see that you are a human and not just a bot generating prospect emails. Before using humor:

- Assess if it is appropriate for your industry and customer.
- Refrain from politics and sensitive topics.
- Be aware that GIFs or memes may end up in a spam folder.

