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G&A Partners
Time to grow.

Success ,Holiday Attention, AI, & Drops,

Holiday Attention!

- **The "Holiday Triage" Email**
  Subject: Quick holiday check-in
  "Hey ___, I know you're probably triaging everything before the break. Should I circle back in January, or is there value in a 10-minute chat this week?"

- **The "Permission to Close Your File" Message**
  "Totally OK if this isn't a fit for 2025. Want me to close the file for now or keep your name on the short list for early January?

- **The "2-Option Close"**
  "Before everyone disappears for the holidays, which option works best:
  A) Quick exploratory call this week
  B) Lock a time the second week of January"

- **The Video Pattern Interrupt**
  20-second selfie video on LinkedIn/InMail:
  "Hey ___, Chris from G&A Partners — quick face to the name before the holidays. I had one thought on how ……."

The goal is to secure an *answer* or a *next step* before calendars blow up.

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“Holiday Decision UFC”:

- Agenda: quick review, questions, what decisions remain
- Time: “We’ll be done in 15 minutes”
- Outcome:
  “Before we wrap up today, can we agree on whether this is something to revisit in January or take off the table for now?”

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Top holiday objections:

- “Let’s reconnect after the new year.”
- “Budget is frozen.”
- “We’re slammed.”
- “Send me something and I’ll look in January.”

Responses:

- Reverse: “Got it — sounds like January isn’t necessarily better unless we lock something now… what’s the real concern?”
- Negative Reverse Selling: “Totally fine if this isn’t a priority for next year… should we push this to Q2 instead?”

1. January Pipeline Engineering

- Create a **"January Jumpstart List":**
- Top 20 prospects to contact between Dec 20–Jan 6
- "Lazy inbox period" advantage: executives answer more emails
- ***Use LinkedIn profile views + video messages to appear top of mind***

2. Building "Holiday Pre-Frames"

- Goal: Set expectations *now* for January movement.
- **The "January Hold Date"**
  "Even if we can't meet before Christmas, want to put a placeholder the week of Jan 6? Those slots go fast."

12/29/25

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Use AI to Understand Prospects' Current Situation. How to use AI (tactical):
Copy/Paste:

You are a B2B sales research assistant helping me prepare to prospect a company for HR, payroll, benefits, and compliance solutions.
Target Company: [Company Name]
Industry: [Industry, if known]
Location(s): [HQ + any major locations]
Estimated Employee Count: [If known]

Please provide a concise, practical overview that includes:

1. Business Overview
What the company does
How they make money
Primary customers and markets
Growth stage (startup, scaling, mature, PE-backed, etc.)
2. Workforce & HR Indicators (based on public signals)
Estimated employee mix (hourly vs salaried, field vs office, exempt vs non-exempt)
Likely HR complexity (multi-state, compliance risk, benefits administration, turnover, onboarding volume)
Any hiring trends, layoffs, acquisitions, or rapid growth indicators
3. Likely Human Capital Pains
Top 5 HR, payroll, benefits, or compliance challenges a company like this typically faces
Where inefficiencies, risk, or employee dissatisfaction are most likely showing up
4. Buyer Personas & Priorities
CEO/Owner: what keeps them up at night related to people, risk, and growth
CFO: financial, risk, and cost concerns tied to HR
HR Leader: operational, compliance, and people-experience challenges
5. Triggers & Prospecting Angles
Events or signals that suggest they may be open to change (growth, compliance risk, benefits cost pressure, leadership changes)
3–5 strong conversation starters or hypotheses I can test in a first outreach
6. Smart Discovery Questions
5–7 pain-based discovery questions tailored to this company and industry
7. Competitive Context
Likely alternatives they use today (in-house HR, payroll provider, ASO, or another PEO)
Common reasons companies like this switch to a PEO
Keep the output clear, sales-friendly, and actionable. Avoid generic explanations—focus on insight I can use in a first call or email.

Exercise (5 minutes):
Everyone picks a target company and uses AI to produce:
- 3 likely workflow pains
- 3 personas + decision criteria
- 2 tailored discovery questions

Optional "Fast Version"

Summarize [Company Name] from a business and human-capital perspective. Identify likely HR, payroll, benefits, and compliance challenges for a company of this type, who the buyers are, what they care about, and 5 strong discovery questions I can use in first outreach.

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Use AI to Prepare Better Discovery Questions (Not Scripts)

Prompts that work: Copy/Paste

You are a B2B sales coach helping me prepare **diagnostic, pain-based discovery questions** for a prospect.
Company: [Company Name]
Industry: [Industry]
Employee Count: [Range if known]
Solution Context: HR, payroll, benefits, compliance, and risk management (PEO)
Key Roles to Address:
CEO / Owner
CFO
HR Leader / People Operations

For each role, provide 8 diagnostic questions that:
Are business-first, not product-centric
Surface pain, risk, inefficiency, or missed opportunity
Help determine urgency, impact, and willingness to change
Are appropriate for a first or second conversation
Avoid yes/no answers and avoid pitching

Frame the questions so they naturally lead the prospect to talk about:
Financial impact
Operational drag
Compliance or people risk
Growth constraints

Keep the questions concise, practical, and conversational.
Do not explain the questions—just list them by role.

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Use AI for Research & Account Mapping in Seconds

LinkedIn is great… And using AI can make it greater!

AI can instantly:

- Identify the likely buying committee
- Summarize responsibilities of roles like Media Engineering Lead or Archive Specialist
- Suggest multi-threading pathways when the main contact goes silent

Example prompt:

I am a salesperson for G&A Partners. Using all of the available information that you can find, build a G&A specific buying committee for ____________ and include: decision makers, influencers, their KPIs, and how G&A would align with each.

Prompt 2: Can you provide names for the above positions?

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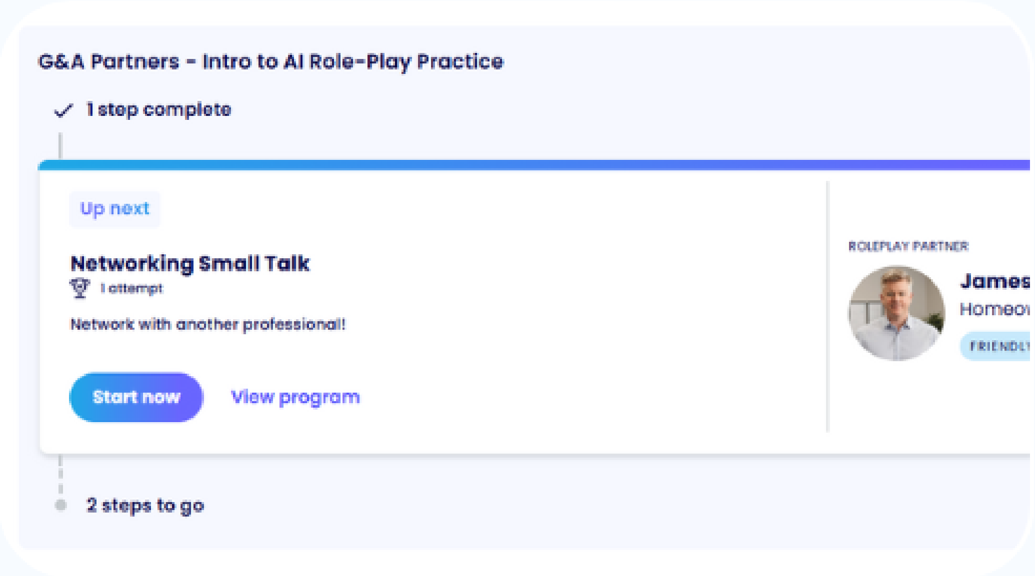
OUTBOUND PROSPECTING CERTIFICATION PLAN

The Outbound Prospecting Certification is designed to strengthen prospecting effectiveness through structured, progressive role-play practice and targeted microlearning. Participants will complete a three-month development journey focused on mastering key prospecting skills and applying Sandler techniques with confidence and consistency.



- **Structure**
  - 6 Total Role Plays built by the Sandler Team
  - 2 Role Plays per Month (1 PEO takeaway, 1 Non-PEO takeaway)
  - 2–3 Microlearning Videos Monthly aligned with goals
- **3 Tiers of Difficulty:**
  - October → Foundational Level
  - November → Novice
  - December → Advanced
- **Certification Requirements**
  - Each role play must score 80%+ to pass
  - Submit best recording (≥80%) each month
  - Recording must have camera turned on
  - Submit to Chris, Erica, Manager, and MB or Kimmie
- **Optional Practice**
  - Participants may create custom role plays to practice specific skills or scenarios.
- **Outcome**
  - By end of December: earn Outbound Prospecting Certification
  - Demonstrate mastery across all three tiers and consistent Sandler execution

Month	Tier	Focus	Role Plays	Microlearning
October	Foundational Level	Foundational prospecting skills	1 PEO takeaway 1 Non-PEO takeaway	2–3 assigned videos
November	Novice	Intermediate prospecting scenarios	1 PEO takeaway 1 Non-PEO takeaway	2–3 assigned videos
December	Advanced	Complex, real-world scenarios	1 PEO takeaway 1 Non-PEO takeaway	2–3 assigned videos

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Alliance Net

Who could you co-market or co-sell with?

Who could you offer alliance services with?

Who could you do speaking engagements with?

Fractional CFOs / CPAs	Host webinars on "Maximizing Profitability with Smart HR & Finance Practices"—tie payroll, tax, and compliance into cost savings.
HR Consultants	Collaborate on workshops about scaling HR infrastructure or reducing legal exposure.
Business Coaches / EOS Implementers	Speak together at Vistage or local business groups—showing how operational alignment includes HR/people systems.
Employment Law Attorneys	Co-author articles or do Q&As around avoiding lawsuits or audits—create urgency to explore a PEO.
Local Chambers / Business Associations	Partner for speaking engagements or resource guides aimed at small business owners—provide the "HR muscle" their members need.

Breakout

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One liners

- Which CEO/Business owner do you know that would appreciate a call from me?
- Who do you care about that would want my help?
- Who do you know that would meet with me based solely on your recommendation?
- How long have we worked together (or known each other)?
- **Because of my own hang-ups, I have been reluctant to put you in an uncomfortable position.**
- One of my personal goals this year is spend more time attending to the needs of my partners. In order to do this I will need to ask others like you for introductions so I can spend less time looking elsewhere.
- I want more clients/partners like you. Would you be open to discussing that?

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DROP INS!

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Thank you!

Share your Actions and Commitments and your Feedback!

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Outbound Prospecting Program

Identifying Introduction Opportunities

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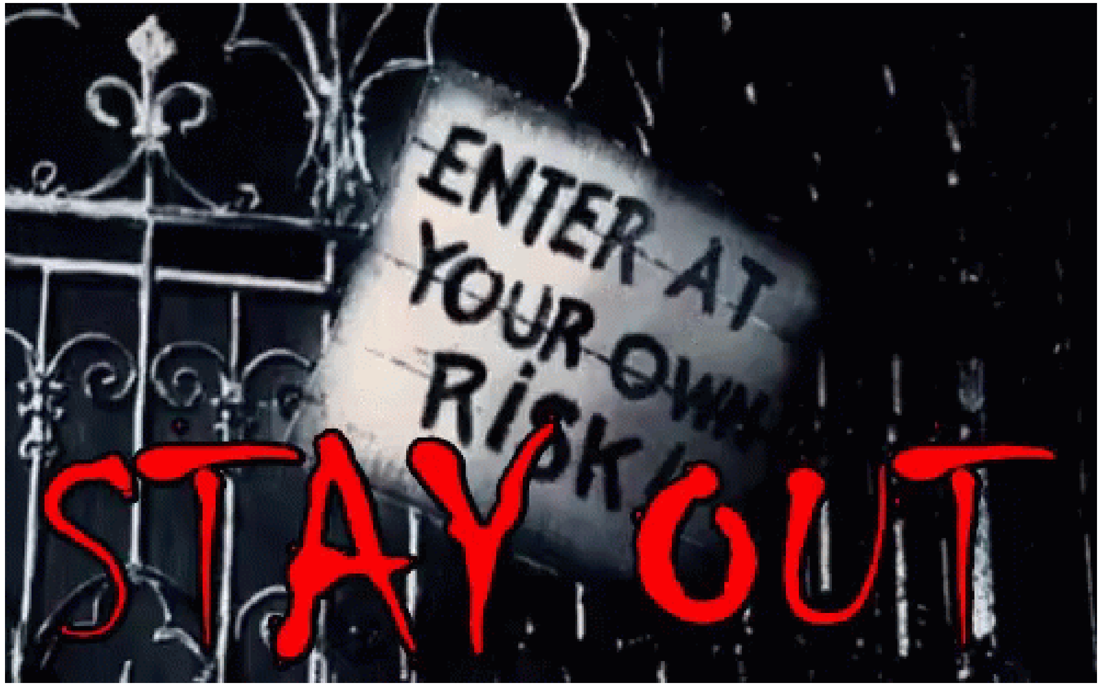
Gatekeepers!



But I like to make the gatekeeper my friend!!!

Gatekeepers at the higher levels handle calls that fall into one of three categories: Personal calls, customer and potential customer calls, and calls from salespeople.

When prospecting, the more that you sound like someone in the first two categories, instead of the salesperson, the greater the chance of your call going through.

Examples of 'too positive' tones:

- "Hello! Is Tom Smith in, please?"
- "Hi! Would you be kind enough to connect me with William Johnson?"

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Initial Methods

- “Hi, this is Chris. Is Tom in yet?” (early morning)
- “Hi. I’m trying to get through to Bill before I leave the office. If he is not tied up in a meeting, would you tell him that Chris is on the line. Thank you.”
- Hi, it’s Chris McDonell. I really hope that you can help. I need to speak with Bill before I go into my morning meeting, which will be starting shortly. Can you put me through?

Common Responses:

- “What’s this about?”
- “Will he/she know what this is about?”
- “What company are you with?”
- “What are you selling”?

There are four techniques that you can use to redirect a gatekeeper's attention:

1. Give an answer that creates a sense of **urgency**.
2. Use reversing – answer the question with a question.
3. Give the gatekeeper more information than he/she wants to deal with. For example: ask a bunch of questions that you think a gatekeeper can't answer… This is called 'overloading.'
4. Make inquiries that the gatekeeper cannot handle.

Urgency

- Salesperson: Hi, I'm trying to get through to Bill before I leave the office. If he is not tied up in a meeting, would you tell him that Chris is on the line? Thanks…
- Gatekeeper: Will he know what this is about?
- Salesperson: I'm calling with some information that I wanted to get to him right away, and I'm about to jump into a meeting. If you could put me through right away, I'd appreciate it.
- Gatekeeper: I will see if he is available.

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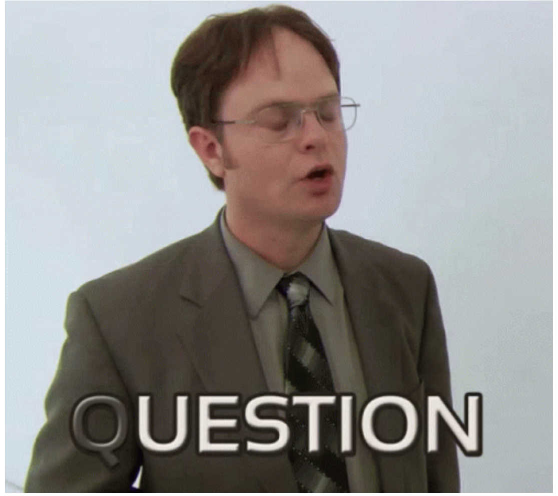
Reversing

- Salesperson: Hi, it's Chris. I really hope that you can help. I need to speak with Tom before I go into my afternoon meeting, which will start shortly. Do you suppose that you can put me through to him?
- Gatekeeper: What company are you with?
- Salesperson: I'm sorry. Is this an inconvenient time for Tom?
- Gatekeeper: No, he's available. Just a minute please.



Or

- Salesperson: Hi. This is Chris. Is Bob still there?
- Gatekeeper: Sure, may I tell him what this is about?
- Salesperson: I'm not sure what it's about. Was not sure if you would know?
- Gatekeeper: Just a minute and I will put you through.

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Overload

- Salesperson: Hi, this is Chris. Is Tom in yet?
- Gatekeeper: What is this all about?
- Salesperson: I am glad that you asked that. Before my company decides about doing business with another company, we find it helpful to spend a few minutes on the phone with one or more of their senior leaders to ask a few pertinent questions. Maybe you can help me…. How many total employees work there?
- Gatekeeper: I do not know the exact amount.
- Salesperson: Ok. Any idea of the locations?
- Gatekeeper: I really don't know the answers to your questions.
- Salesperson: Oh, sorry. I was hoping that I could ask Tom these questions this morning.
- Gatekeeper: Well, I guess it's all right. Just a minute please.

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Pretense

- Salesperson: I have a note from my company with Bob's name on it and I do not know what it is about.
- Gatekeeper: What's it about?
- Salesperson: As I said, I do not know. May I ask you; do you know?
- Gatekeeper: No.
- Salesperson: All I have is his name. Would it make sense to talk to him? Or can you put me through, and we'll see if we can solve this mystery.
- Gatekeeper: I'll let you talk to him.

Voice Mail Jail: "Sue, I've left a couple messages. I get the sense that Pam doesn't want me to call again. If you were me, how would you find out if I should stop calling?"

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