THE SPEAKERFLOW

WATERTIGHT SELLING

GUIDE & EXERCISE

speakerflow.com

INTRODUCTION

Welcome to the first step in transforming your sales process! We're so excited to be supporting you on your journey as a thought leader and expert business owner.

Before we dive in, you may be asking, "Why did you create this guide in the first place?"

The short answer is that there's a ton of noise out there, regarding how to best sell your services.

Within our own team, we've spent hundreds of hours bouncing between different strategies including recommendations like "Post on social media more," "Write more content," "Always ask for the sale," and "You need funnels". We've also obsessed over the number of touchpoints, times of day for sending emails, or even the delay in between touches, but nothing worked!

In trying these strategies, we were unknowingly implementing many of them simultaneously. Like many expert business owners, we weren't focused on a single strategy and ultimately muddled our results. That's where this guide comes in.

In the following pages, we've put together a detailed guide to developing a process for nurturing new leads (business development) and converting qualified individuals into sales (sales development). We'll break down how to organize your leads, how to move your deals through your pipeline, and outline templates for each step.

Here, you'll find tried and true sales strategies, all tested by our team and all geared towards a single goal. By the end of this guide, you'll not only have learned our proven Watertight Selling blueprint. You'll also walk away with a documented sales cadence, email templates, phone call templates, LinkedIn message templates, and everything else you need to boost your sales success year over year.

So what do you say? Are you ready to focus and master Watertight Selling? Let's get into it! 🚀

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BUSINESS DEVELOPMENT

Business development happens when we're taking someone that hasn't been qualified yet – and with whom we don't have a relationship – and nurturing them towards having a sales conversation with us.

This process happens in your Leads module in the CRM. They'll convert to a Contact and Deal if they've expressed interest and you feel are a real opportunity in your pipeline. This is when you'll move on to the Sales Development process. You'll get leads to reach out to from people submitting forms on your site, manual prospecting, or list generation.

It takes 7-12 touch points on average before someone has enough trust to respond. This isn't a magic number but something you can expect. These touchpoints can come from manual outreach with emails and videos, or as a part of your email marketing list. For this process, we'll focus on 7 initial touchpoints with the option to continue your outreach or move on to a new lead.

The Cadence - 28 business days

1. Email

   3 business days

2. Reply to Email #1

   4 business days

3. Phone Call > LinkedIn > Email

   5 business days

4. Email

   5 business days

5. Reply to Touch Point #4

   5 business days

6. Video Email

   3 business days

7. Email

   3 business days

8. Review lead to determine whether to continue outreach

   If yes, set a follow-up (usually 5-10 business days away). You'll set these manually, and always set a new task after completing one.
   If no, move the lead to "Never Responded" lead status and set a task to circle back later if you want.

Pro Tips Before Getting Started

- Don't sound like a robot with ANY message you send. If you wouldn't say it out loud, don't send it in an email.
- Use "I/Me/My" AS LITTLE as humanly possible. It's not about you. It's about them.
- Don't use block text. If your text is more than 3 lines, trim it back. The more white space the better. You want your messages to be skimmable.
- If shooting a video or audio message, make it less than 90 seconds
  - Exception: Sometimes, you want to send a video that provides value. Maybe teaches them something. If this is a value-add touch point and not one of the initial ones, you can swing 3-5 minutes. The longer, the less likely people will absorb it.
- Create several "value add" emails you can lean on in touchpoints 3-7. Having resources to select from can not only help you test what gets responses but also gives you more variety to send at later points in the process. Especially if you choose to continue following up after touch point 7
- Remember, outreach isn't about getting the sale (right away). It's about getting a reply! Then having a conversation, then maybe making a sale.
- Use lead scoring to assign points to your leads based on how they're engaging with your emails (See the SF team for questions/setup):
  - Give 1 point if they open
  - Give 2 points if they click
  - Subtract 10 points if they bounce
  - Add/subtract points based on lead status

TOUCH POINT 1: EMAIL - THE INTRO + DIRECT ASK

When: Immediately after you've finished your research and are ready to reach out

- This email is meant to be a simple intro to who you are and why you're reaching out. Don't beat around the bush here.
- **Pro Tip:** Create a video email using Loom to be ultra-personalized for your first touch point. First impressions go a long way.
- ALWAYS customize before sending
- Format: Text or Video
  - If you choose to use video, you can use the email templates below as a script of what to say.

Subject Line Ideas

- Your upcoming event
- Have you chosen keynoters yet?
- Before you finalize your event…
- Quick question re: {event name}
- Plans to handle {X} issue at {X} company?
- Checking in for [quarter Q1/Q2/Q3/Q4]

Email Structure

1. Something relevant that explains why you're reaching out
2. Who you are and what you help with
3. Ask ONE question
4. CTA
5. Sign Off

Example - An Upcoming Event

Subject: Quick question re: {event name}

Hey {first name},

Really excited about {event name} coming up in {event month}. Particularly, your focus on {event theme}.

OPTIONAL: I also saw you recently {something you noticed about them from your research - look at their social channels}

We haven't met yet but I'm {your name}. I help my clients {value proposition}.

Are you open to bringing in a speaker who can {list the results you provide}?

Let me know either way. Hate to be irrelevant!

Talk soon,

{signature}

One more example on the next page →

Example - B2B, Unsure If They Have An Event

Subject: Quick question re: {event name}

Hey {first name},

I saw that you manage {what the prospect manages} initiatives for {X} company.

OPTIONAL: I also saw you recently {something you noticed about them from your research - look at their social channels}

We haven't met yet but I'm {your name}. I help my clients {value proposition}.

Have you finalized this year's training plans?

Let me know either way. Hate to be irrelevant!

Talk soon,

{signature}

TOUCH POINT 2: REPLY TO EMAIL #1

When: 3 business days after the last touch point

- This email is meant to be a reply to the first email. Many make the mistake of inundating their leads with too much information. Trust me, if they're interested, they'll go to your website or reply.
- Keep it super short and sweet
- Could be an okay time to link to ONE piece of marketing material (highlight reel, website, one sheet, research you put together, etc).

Subject Line Ideas

You should go to your CRM, find the last email you sent, and hit the "Reply" button. This way, your subject line will look like: "Re: {previous email's subject line}".

If you're using a template in the CRM, set the subject line as "Re: {event name}".

Email Structure

1. Acknowledge they're busy
2. Provide the link to one piece of marketing material or custom video
3. Ask the same question in touch point 1
4. CTA
5. Sign Off

Example - An Upcoming Event

Subject: Quick question re: {event name}

Hey {first name},

With {X} (specific initiative or topic if possible), I can imagine you're busy.

To provide extra context for my last email, I thought I'd shoot this for you (it's quick).

{INSERT CUSTOM VIDEO/LINK TO MARKETING MATERIAL}

Have you finalized this year's [training/speakers]?

Let me know either way - hate to be irrelevant!

{signature}

TOUCH POINT 3: CALL > LINKEDIN > EMAIL

When: 4 business days after the last touch point

- There's no denying the fact that there's nuance to selling. And sometimes your next touchpoint isn't black and white. For touchpoint 3, prioritize a phone call if they've engaged previously (opens/clicks), otherwise default to a LinkedIn connection and/or message, and if no LinkedIn profile, send an email
- If your lead has opened and/or clicked on the previous 2 emails, consider picking up the phone. Capitalize on their engagement early on.
- If you leave a VM, send an email afterward (see template below)
- Email - Behind-the-scenes email
- Share something you've learned recently
- CTA: Schedule a 30-minute call

Basic Phone + VM Script - “Are we a fit?” Call

If you call, the goal is to quickly qualify them into a deeper conversation, 30 minutes ideally. Chances are, they don't have 30 mins for you to do full discovery right now. If they do, great! But otherwise, go into this call assuming that you have less than 5 minutes.

Phone Script - They picked up!

Hi {lead name}, this is [your name} from {your company}

How are you?/How’s it goin’?/How’s the week been treating you? (Super casual)

> This is a wonderful time to build rapport. Mention something they said and build on it, ask a question, or mention something you saw on their LinkedIn profile.

I’m calling because I frequently help {your ideal client} {value proposition} - Do you have a couple of minutes?

> Alternatives:
>
> - *I’m calling about {event name} and just recently spoke for {a similar stage/company} and saw some similarities. Do you have a couple of minutes?*
> - *I’m calling because I was researching {event name/company} and thought there was some alignment between us.*

If "No"

“Totally understandable. When is a good time to chat for a couple of minutes?”)

If "Yes"

Great. This could only take a couple of minutes. My big question is…

- *Have you already solidified your speakers for this event?*
- *Are you currently working to solve {X} problem?*
- *Do you do internal training on {what your expertise is}?*
- *A lot of my clients are focused on {X} - are you in the same boat?*

> Or ask another powerful question that tells you whether or not they’re worth moving into a discovery call.
>
> Listen carefully. Once they’ve answered, it’s time to go a bit deeper. Just remember, they didn’t commit to a ton of time on this call. Ask 1 or 2 more questions that can help you indicate they’re a good fit.

Potential Questions To Ask

Existing Event

- *What type of topics have your members been asking about?*
- *Do you find that your members are experiencing {an issue you solve} and are looking for ways to solve that?*
- *How often do your members bring up the issue of {issue you solve}? Have they shared any solutions that are working?*
- *Who do you think was the most successful speaker you hosted last year? Why?*
- *Are you struggling with hybrid or virtual events? Where is the disconnect?*

B2B

- *How are you navigating {common issues/outcomes that your clients experience}?*
- *Are your employees suffering from {an issue you solve} due to {a common reason for this issue}?*
- *How are your managers talking with your employees about {an issue your solve/your expertise}? What tools have they implemented? Are those working?*
- *Do you have a program in place to help train your staff on {your expertise}?*

Thank you for explaining all of that. I can definitely tell we have some alignment. Say, I know I caught you unexpectedly and I value your time.

Are you open to scheduling a 30-minute call to discuss your {event name/initiatives/etc}?

SCHEDULE THE CALL LIVE - DO NOT SEND A LINK UNLESS THEY ASK

Great! You should have an invite on your calendar. I'll shoot over an email with some more information in the meantime.

Thanks for making space today, {name}.

[Let them reply]

Talk soon!

Didn't answer? Find a voicemail script on the next page →

Voicemail Script

Hey {name}. This is {your name} with {your company name}.

I'm calling to ask…

- *Have you already solidified your speakers for this event?*
- *Are you currently working to solve {X} problem?*
- *Do you do internal training on {what your expertise is}?*
- *A lot of my clients are focused on {X} - are you in the same boat?*
- *Or ask another powerful question that tells you whether or not they're worth moving into a discovery call*

Are open to chatting for 5 minutes about this?

Let me know either way! My phone number is (XXX) XXX-XXXX - feel free to call or text.

Talk soon!

{your name}

Backup: LinkedIn Connection Request Note/Message

If you're not already connected with this person, connect and add a note. Otherwise, send a message!

> *Hey {name}. Saw we weren't connected yet so thought I'd send over a connection request. Let's chat soon?*

Backup: Email

If you haven't done a video at this point, this would be a great place to do it.

Otherwise, treat this email as a value-add email. You can share a blog you wrote, a resource you have, or something that adds value to your message.

Another way to go about this email is by sharing something "behind the scenes" - Tell a story of a recent client, a stage you were on, or something you learned.

Example

Subject: Thought you'd find this interesting

Hey {first name},

One of the biggest misconceptions people have about {a problem you solve} is….

But you see solving {problem you solve] isn't as difficult as it's made out to be. I put together this resource to help my clients overcome this problem and thought you might find it valuable too.

Here's a link to it.

Reply and let me know what you think!

{signature}

TOUCH POINT 4: GIVE EMAIL

When: 5 business days after the last touch point

- If you didn't use an email for touch point 3, use that email template
- **Pro Tip:** Build out several "value add" emails to use when reaching out. You can use the below email structure to build as many as needed.
- Provide a resource that might be valuable to them. This could even be a resource you didn't create. Find a piece of research, an article, or something else that provides value, and send it to them.

Subject Line Ideas

- Have you seen this yet?
- {X} ways to solve {a problem you solve}
- Thought you'd find this interesting, {lead name}
- Resource on {a problem you solve} for {lead name}

Email Structure

1. Intro to the problem
2. You found/created some content/research/video
3. One thing you might find interesting…
4. Here's a link
5. CTA
6. Sign Off

Example

Subject: Have you seen this yet, {lead name}?

Hey {first name},

The main reason I'm obsessed with solving {a problem you solve} is because {reasons you do what you do}.

On that quest, I found this piece of content/research/video/etc that really captures the essence of why it's important to solve this problem.

One thing I thought you might find interesting is… {sentence, quote, data point from the resource}.

Here's a link to check it out.

Reply and let me know - What's the hardest part about solving {a problem you solve}?

{signature}

TOUCH POINT 5: EMAIL REPLY TO TOUCH POINT 4

When: 5 business days after the last touch point

- Similar to touch point 2, you're replying to your email from touch point 4
- This can be a simple, "did you see this?" email or optionally, if you're finding your lead to be engaging with your other emails, maybe take time to create a video breaking down the resource you shared in touch point 4.

Subject Line Ideas

- RE: {touch point 4 subject line}
- Following up on this

Email Structure

1. Did you see this?
2. What'd you think?
3. Sign Off

Example

Subject: RE: Have you seen this yet, {lead name}?

Hey {first name},

Did you see this? (threaded)

What did you think about it?

{signature}

TOUCH POINT 6: EMAIL - THE RIGHT PERSON?

When: 5 business days after the last touch point

- The goal of this email is to make a softer ask. Meaning, one that isn't so "book me now" type of language. At this point, we want to know if we're even reaching out to the right person.
- Optional, make a video for this if you're finding the lead to be engaged with previous touch points.

Subject Line Ideas

- Still planning {event name}?
- Are you the right person?

Email Structure

1. Reached out a few times - that's okay!
2. Are you currently looking for speakers/trainers/people to help solve {problem you solve}
3. CTA
4. Sign Off

Example

Subject: Are you the right person?

Hey {first name},

I've reached out a few times but want to confirm - are you currently looking for speakers for {event name}?

Alternative:

- *Are you the right person to talk with about solving {a problem you solve} for {company name}?*

Either way, can you reply and let me know? I deeply care about creating value and not wasting your time.

{signature}

TOUCH POINT 7: EMAIL - THE HARD ASK

When: 3 business days after the last touch point

- The goal of this email is to make a firm ask. Be super direct, short, and to the point.
- What is it exactly that you want to know from this person? This is where you ask it.

Subject Line Ideas

- I want to help with {x problem}. Thoughts?
- Let's talk keynotes
- 30-minute chat?
- Last call to solve {problem you solve}

Email Structure

1. Reached out a few times - that's okay!
2. Are you currently looking for speakers/trainers/people to help solve {problem you solve}
3. CTA
4. Sign Off

Example

Subject: Let's talk keynotes

Hey {first name},

The last thing I want is to be a bother, so I figured I'd reach out one last time.

Do you have any interest in chatting about partnering on an {X} event for your team or still need speakers for {X} initiative?

If I don't hear from you, I'll stop filling your inbox. If your needs do change, please keep me in mind. Based on {X} about your company, I think a partnership could drive significant value.

Are you open to scheduling a 30-minute chat? Let me know either way!

{signature}

FINAL STEP: REVIEW LEAD AND DETERMINE NEXT STEPS

When: 5 business days after the last touch point

- As we've talked about above, there's nuance to sales. Just because someone hasn't replied at 7 touch points doesn't necessarily mean it's a bad lead. In this step, your goal is to determine one thing: based on the previous engagement of this lead (opens/clicks) AND my desire to work with this event/company - are they worth continued outreach to?
- Go into the lead record in your CRM and look at the previous email engagement
- If they've been engaging more often than not, you may want to consider setting manual follow-ups with this person.
- **If you want to continue outreach:** Set a follow-up task for a week in the future to reach out. You can use a value add email or make another phone call – You pick. Then, after you complete that task, set another one for a week or two out again.
  - If you think their buying window has passed, but it's an annual event, maybe set a task for 6 months out to restart the process. Remember, sales is about planting seeds and harvesting when the time is right. Patience is a virtue!
- **If you want to stop outreach:** Update lead status to "Never Responded" and if relevant, set a follow-up task for further the future – 90-180 days away – if you believe there's a chance of working with them down the line.

SALES DEVELOPMENT

You know you're in the sales development stage when you have a new deal in your pipeline.

If you converted a lead, it's because they've finally expressed interest and booked a call with you to discuss more. Some refer to this call as a "Discovery Call" or "Strategy Session". You can refer to however you'd like. The main goal of this call is to discover and understand their needs with the intent to pitch your services accordingly.

The sales development process should match the Deal Stages you have in your CRM. We'll outline each stage below, common next steps, and follow-up best practices so you can swiftly move deals through your pipeline.

Remember, your deals don't need to end up going through every stage. It's okay to skip a stage if a sale progresses more quickly. In fact, that data is really important to your overall sales process.

Pro Tips

- Make sure EVERY deal in your pipeline has a follow-up task. This doesn't even have to be a legit follow-up. Just make sure there's a task to remind yourself about the deal if a certain amount of time lapses. Usually 1-4 weeks. If every deal has a follow-up task, nothing will slip through the cracks (aka Watertight Selling)
- Think about all the tasks you might need at each stage of the process. What needs to happen if a deal enters the Proposal stage? What should happen if it reaches the Verbal Agreement stage? What if it reaches Contract Out? You get the idea. These tasks can be automated!
- Make sure the following fields are ALWAYS filled out:
    - Deal Amount - If you're unsure, put your average fee in the amount until you update it later.
    - Contact and Account
    - Source
    - Closing Date - The date you expect them to sign a contract. This is your best guess until the day they actually close. You'll update the close date when you move the deal to a Won or Lost stage

  - Decision Date - The date you expect to get a decision. This is often different from the closing date by a couple of weeks.
  - Business Type - This is your revenue stream field and controls the logic to show/hide fields in the CRM. Gotta know what you're selling!
- Compare the fields in your Deal record to the information you need to load into a contract. Create any new fields you need so you can automate your contract to be filled out.

CONNECTED

- This deal stage is for people who are interested in working with you. Generally, after they schedule a discovery call with you. You're waiting for the meeting to run, or you're following up after they expressed interest to get a meeting on the books.
- If you have a meeting scheduled and a deal is in this stage, you may want to send meeting reminders (your calendar tool does this automatically) to ensure they show up to the meeting.
- If someone schedules a meeting for more than 2 weeks out, you may want to consider a personal touch point while you're waiting to keep their impulse high.

IN DISCUSSIONS

- Once you've had your first sales meeting and you've qualified them to be a good fit to work with, you're "In Discussions".
- Sometimes, you need to have more than one meeting before you propose anything. If that's the case, your deal will stay in this stage until you've either verbally proposed a solution and your fee or you've sent them a formal proposal/quote.
- This is also a good stage to keep any opportunities you've received from Bureaus as "Holds". Usually, the bureau is in discussions with the potential client, trying to seal the deal.
- **Pro Tip:** Make sure you're using your Source field in the CRM. This tells you how you acquired the Deal and can be used for data later on.
- Set follow-ups if you need to schedule more than one meeting.

PROPOSAL

- If you don't send a formal proposal or quote out ahead of closing a deal, you'll move deals to this stage when you've verbally proposed your solution and fee to the prospect.

- Sometimes this happens on sales call #1 and you can move someone right from the Connected stage to the Proposal stage.
- Only move a deal to this stage if they're still interested in working with you after verbally proposing your fee.

NEGOTIATION

- After verbally proposing or formally proposing your solution and fee, sometimes clients want to negotiate. That's what this stage is for!
- If you have to have more conversations after proposing and they're going back and forth with you on budget and deliverables, you're in the Negotiation phase.
- Sometimes additional meetings may be needed to sort out the best way you can serve them with the budget and resources they have available.
- **Pro Tip:** Know what you're worth! If your gut is saying "this is a lot of work for this small amount of money", politely decline the business. Remember, every chance you get to negotiate is a chance to strengthen your skills.
- **Pro Tip #2:** Rather than discounting your fee, what can you "bundle" into the work you already do to add value so they're willing to pay what you're looking for. Think of things like an additional breakout, Q&A session, dinner with the board the night before, etc.

VERBAL AGREEMENT

- When a prospect has said "Yes. Let's move forward.", you're now in the Verbal Agreement stage.
- Sometimes, you need to go back and forth with the prospect to confirm contract details and you need to take a moment to send that contract. If you don't have time right now, put their deal in the Verbal Agreement stage, and set a task to send a contract out ASAP.
- Once you send the contract, you can move it to the next stage.
- **Pro Tip:** This is where contract automation get's handy! Using the CRM + Sign, you can have a contract pull all the info from a Deal record into your contract so you can send it off in a breeze.
- **Pro Tip #2:** Using Layout rules, you can say "When I move a Deal to the "Verbal Agreement" stage, make these fields required. This way, you're prompted to fill out all the fields that are necessary relating to your contract.

CONTRACT OUT FOR SIGNATURE

- This one's pretty self-explanatory. Once you send the contract out and you're waiting for them to sign, put your deals in this stage.
- Make sure you set a follow-up task for at least a week out to check in if they haven't signed yet. Again, every deal should have a task to remind you about it so it doesn't slip through the cracks.

CLOSED WON - PENDING DELIVERY

- You made it! Congratulations! A Deal has been won! You'll move a deal to this stage AFTER they've signed a contract.
- Normally this stage is when the "Sales to Operations Handoff" begins. You'll create tasks that need to be completed to fulfill the contract. If it's an event, think of things like booking travel, pre-event questionnaires, sending books, etc. Start thinking about all the different tasks you need to be reminded of for all the different revenue streams you have to make the client experience as dialed as possible.
- You'll keep your deals in this stage until AFTER you've delivered for the client AND you've completed any post-delivery tasks (debrief calls, request intros/testimonials, etc).

CLOSED WON - COMPLETE/ARCHIVE

- After you've delivered for your client AND you've completed any post-delivery tasks (debrief calls, request intros/testimonials, etc), you can move a deal to this stage.
- You'll stack up all your deals here with time for historical reporting
- **Pro Tip:** After marking a deal as Complete/Archive, determine if there's a potential to do more events in the future with them. Set a follow-up task on the contact record for the deal, and, if there's an opportunity in the future, clone the original deal and put it back in the Connected stage of the pipeline.
- **Pro Tip #2:** Every single one of your past clients should have a personal follow-up task on their record in the CRM. After marking a deal as complete, set a follow-up task on the contact for every 90 days to provide them with value and check-in. You'll generate SO much business from being top of mind.
- Alternatively, add them to a list in Campaigns and send an email every so often showing them what you're working on "behind the scenes".

CLOSED LOST

- The truth is that, for most, we lose more deals than we win. Any time a deal falls through, you're going to put it in the Lost stage.
- But, all is not lost! Set a follow-up task on the contact record of the deal if there's a potential event in the future or if you want to try and requalify later (normally 3-6 months away).

OVERALL PRO TIPS

OBJECTION HANDLING

There's no getting around objections in sales. It's just the name of the game. Especially when you're reaching out fairly cold, you can experience some tough objections. BUT, just know, you're sharpening your blade. The more objections you experience, the better you'll become at overcoming them.

Here are some common objections and how to handle them:

- **"I don't have time to talk":** The prospect is trying to get you off the phone as soon as possible. Ask, "When's the best time for a quick 5-minute call?". By offering a short amount of time, you're showing a minimal investment and you respect that they've said now isn't a good time to talk.
- **"Let's talk in {X} time":** Textbook! This is usually because the prospect isn't quite ready to think about the buying process yet. Sometimes there are other decision makers or simply, that it's not a good time. When you get this objection, it's good to clarify: "What does your decision-making process look like for something like this?".
- **"Just send me an email":** This will pop up often. That's okay! If you don't have an email, ask for it, and ask them what information they want it to include. Then, send a series of follow-ups with your qualification questions (above) one at a time. The goal of this dialogue is to get them interested in having a conversation with you.

MAKE OUTREACH A SACRED HABIT

What's the saying? Old habits die hard? Well, so do the lack of habits.

Block off sacred time every week (ideally every day) to complete your sales outreach. If you're calling, generally aim for between 9 am and 11 am, and reward yourself after making all your calls.

Reinforce the behavior early on and grit through it. Remember discipline where motivation lacks.

PLAN, EXECUTE, TEST

This outline is the plan. You calling is the executing. DO NOT FORGET TESTING. What do I mean by that?

This outline is just a starting point. You're going to learn what works and what doesn't. Update this outline as you go.

Test different phrasing for your value proposition or reason for calling.

Test new methods of personalization - how can you be more relevant?

When someone responds favorably to what you just said, write it down - we call these "lean in moments".

MIRRORING

Have you ever had a conversation with someone whose energy is completely different than yours? Think textbook door-to-door salesman after you've had a long day.

Your mood is neutral at best and theirs is extremely loud, peppy, and bubbly.

Often, people find this inauthentic and immediately shut the door.

Within the first 30 seconds of the call, assess what their mood is like. Try to match their cadence, tone, and way of talking.

The fastest way to build rapport is to mirror.

WATERTIGHT SELLING EXERCISE

OVERVIEW

Objective

The following cadence will need email templates, LinkedIn message templates, and phone call scripts/outlines.

The Cadence - 28 business days

	1. Email
3 business days	
	2. Reply to Email #1
4 business days	
	3. Phone Call > LinkedIn > Email
5 business days	
	4. Email
5 business days	
	5. Reply to Touch Point #4
5 business days	
	6. Video Email
3 business days	
	7. Email
3 business days	
	8. Review lead to determine whether to continue outreach

If yes, set a follow-up (usually 5-10 business days away). You'll set these manually, and always set a new task after completing one.
If no, move the lead to "Never Responded" lead status and set a task to circle back later if you want.

Start writing your templates!

TOUCH POINT 1: EMAIL - THE INTRO + DIRECT ASK

Subject:

TOUCH POINT 2: REPLY TO EMAIL #1

Subject:

TOUCH POINT 3: CALL > LINKEDIN > EMAIL

Are We A Fit Call Script

Voicemail Script

LinkedIn Connection Note

Email

Subject:

TOUCH POINT 4: GIVE EMAIL

Subject:

TOUCH POINT 5: EMAIL REPLY TO TOUCH POINT 4

Subject:

TOUCH POINT 6: EMAIL - THE RIGHT PERSON?

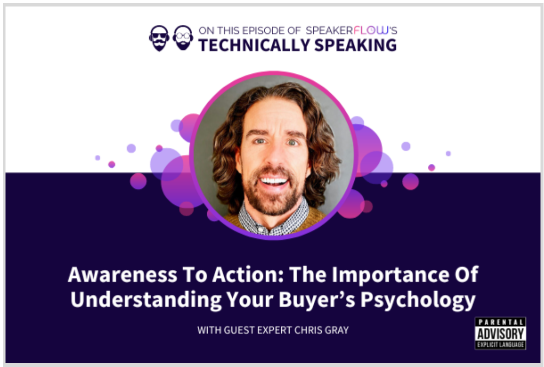
Subject:

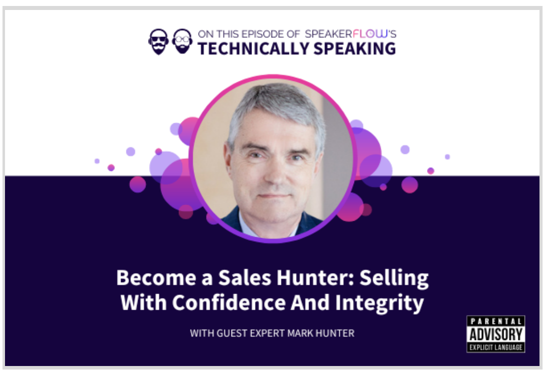
TOUCH POINT 7: EMAIL - THE HARD ASK

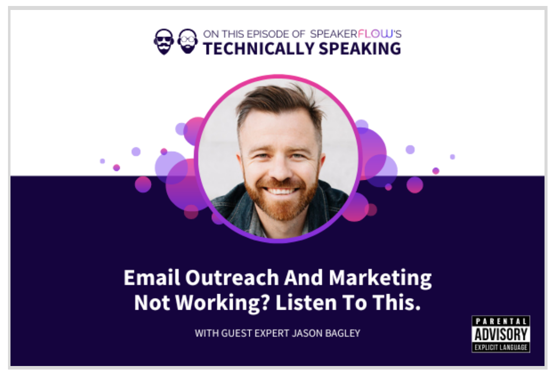
Subject:

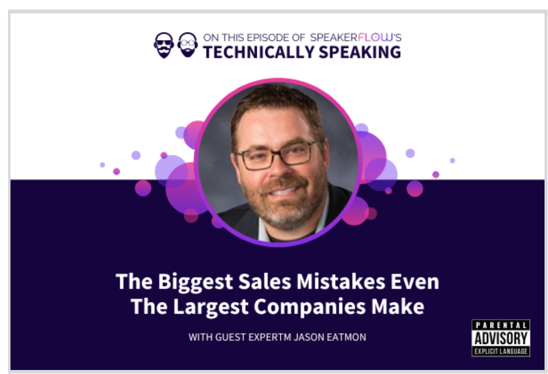
ADDITIONAL RESOURCES

PODCAST EPISODES









BLOG ARTICLES

- "25 Expert Cold Calling Tips" from Yesware
- "14 Proven Tips For Getting Past The Gatekeeper" from Sales Hacker

Questions or Comments?

Contact us at
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and let us know what you think!

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