SAGE

TRAINING BROCHURE

DATA-DRIVEN PROSPECTING FOR PROFESSIONAL SERVICES 2021

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SAGE

DATA-DRIVEN PROSPECTING

Professional Services

Professional services businesses thrive on the strength of referrals and word-of-mouth. However, as markets mature and become more competitive, passive approaches to business development are no longer enough to rely on. Data-Driven Prospecting for Professional Services will teach business development professionals the tools and techniques they need to proactively find and engage their ideal client prospects in a targeted, process-driven and scalable manner.

This program is designed for anyone who is responsible for business development, whether to find new clients or to generate more business from existing clients.

THE OUTBOUND FUNNEL

In this session, we discuss the importance of taking a process-driven approach to outbound prospecting, the components of an effective prospecting system, and how to get started by defining your ideal customer profile.

You'll learn:

- Each component of *The Outbound Funnel*, a 5-step outbound prospecting system
- How to create your Ideal Customer Profile

BUILDING PROSPECT LISTS AT SCALE - OPTIONAL

In this session, we explore two non-technical web scraping techniques that will help you efficiently build large lists of relevant prospects, how to use freelancers to drastically increase your efficiency, and how you can personalize your lists at scale.

You'll learn:

- How to use the advanced searching functions of LinkedIn to find prospects
- How to use non-technical web scraping to build prospect lists from almost anywhere on the internet
- What information to capture when building a list of prospects
- How to delegate this work to freelancers to increase your efficiency

AUTOMATING YOUR OUTREACH

In this session, we introduce the concept of a sales sequence and discuss the role of sales engagement software in automating your outbound prospecting system.

You'll learn:

- How to create an effective sales sequence
- How to automate and optimize your outbound campaigns using sales engagement software

Coaching Add-On: 1-1 sequence design workshop

CREATING YOUR MESSAGE

In this session, we discuss the difference between 'me' vs. 'you' messaging and how to create a value proposition that aligns with your prospect's priorities and challenges.

You'll learn:

- How to create messaging that focuses on your prospect, not on you
- The principle of exchanging value for action in cold communication

DELIVERING YOUR MESSAGE (EMAIL) - OPTIONAL

In this session, we look at the structure of an effective cold email sequence, share the principles of writing compelling email copy, and bring it all together to help you practice writing and editing your own cold and follow-up emails.

You'll learn:

- The 3-part structure of an effective cold email
- How to write and edit your own cold email
- How to write and edit two types of follow-up emails

Coaching Add-On: 1-1 email editing workshop

DELIVERING YOUR MESSAGE (PHONE) - OPTIONAL

In this session, we examine the flow of an effective 'cold' call and share techniques to get your prospect to talking and agreeing to take action.

You'll learn:

- The structure of an effective cold call
- How to execute your own cold call
- Techniques for overcoming anxiety, creating symmetry, and initiating the conversation

Coaching Add-On: 1-1 live cold calling session

SEGMENTING YOUR ACCOUNTS - OPTIONAL

In this session, we introduce and apply the concept of account segmentation to your existing accounts to help you better target your outreach and prioritize your time.

You'll learn:

- How to segment your accounts into Tier 1, Tier 2, and Tier 3

Coaching Add-On: 1-1 Account Segmentation review

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DELIVERY OPTIONS

ONSITE DELIVERY

- 3-7 two-hour sessions delivered over 2-4 weeks
- Small group exercises and hands-on activities
- Homework assigned after each session

REMOTE DELIVERY

- 3-7 two-hour live-streamed sessions delivered over 2-4 weeks
- Individual exercises and activities to increase engagement
- Homework assigned after each session

REINFORCEMENT PLAN

PRE-TRAINING (MANAGERS)

Three weeks before the training, management and SAGE will meet to review the training materials, answer questions and decide on specific learning outcomes to be emphasized during the training. At this time, managers will also have the option to set their teams up with a specific prospecting campaign that they can execute throughout the duration of the training.

PRE-TRAINING (PARTICIPANTS)

Participants will be provided the training materials one week before the training. They will also be sent a pre-survey to register for the training and assess their level of experience and desired training outcomes.

POST-TRAINING (MANAGERS)

SAGE will conduct a wrap-up meeting with management to provide feedback, analysis and coaching recommendations for each participant and the group as a whole. Managers will receive a post-training resource kit to help them reinforce the training.

POST-TRAINING (PARTICIPANTS)

SAGE will conduct a 1-1 wrap-up meeting with each participant to give overall feedback, recommendations and to answer any questions about the training. Participants will also be given access to a discussion group for direct access to SAGE.