Tactical Prospecting

How to Maximize the Four Essential Factors of Successful Prospecting

James Muir – OutBound 2019
About Your Presenter

James Muir

- Best-selling author, professional sales trainer, speaker & coach
- 30 Years In Sales & Management
- Sold-to & spoken for the largest names in technology & healthcare including HCA, Tenet, Catholic Healthcare, Banner, Dell, IBM & others.
What Should I Be Doing?

• Zero Pipeline

• How should I spend my time?
  – Learning product or finding opportunities?
  – Focus on new biz or existing customers?
  – What channels should I use?
Time Priorities

• Hypothetical:
  – Brand New Rep
  – Pipeline of Zero

• Where should you focus most of your time?
  – Learning Product?
  – Finding New Opportunities?
Learning Products vs. Finding Opportunities

• Both are important.
• **Finding Opportunities** Deserves More Focus.
• Why is that?

Reason:

Success Comes Faster
What happens?

- Adrenaline
- Heightened Senses
- “Hypervigilant Mode”

- Success = Rush
- Failure = Primed for Learning
The Challenge

Where the magic happens

Your comfort zone
Key Point # 1

Necessity is the crucible of learning.
The Obstacle is the Path – Zen Proverb
How Much Do I Need To Know?

• Answer: The Bare Minimum.

The Fastest Path Is In The Crucible
Zero to Hero

• 4 Key Areas of Focus
• BEFORE You Start
• Working Smart Before Working Hard
• Make Prospecting Tactical vs. Random
Top Sales Challenges

1. Prospecting - 49%
2. Closing - 24%
3. Qualifying - 22%

Source: Survey of 6400 executives & sales reps in 141 countries, HubSpot
Prospecting is Getting Harder

“What is more difficult to do in sales now compared to 2-3 years ago?”

1. Getting a response from prospects
2. Connecting via phone
3. Engaging multiple decision makers at a company
4. Identifying/prospecting good leads
5. Closing deals
6. Connecting Via Email
7. Avoiding discounting/negotiation
8. Keeping Someone on the Phone
9. Incorporating social media into the sales process
10. Using sales technologies
11. Sourcing referrals
12. Researching before initial call/email
13. Delivering a presentation

Source: Survey of 6400 executives & sales reps in 141 countries, HubSpot
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Why is Prospecting Getting Harder?

Drivers:

1. Marketing Message Overload
2. Internet
3. Diminishing Attention Spans
What’s the Solution?

Is more activity the answer?
New Challenges Lurking Under the Surface

1. **Robotic Competition**
   - Intent Data
   - Machine Learning
   - Artificial Intelligence
   - Utilization of Dark Data
   - Robotic Process Automation (RPA)
   - Virtual Assistants
   **Promise:**
   - Greater Precision
   - More Scale
   - **Even Higher Volumes of Messaging & Interaction**

2. **Sophisticated Customers/High Expectations**
   - 24/7 Access
   - Domain Expert Preference
   - Every Encounter Inherently Valuable
   - Narrower Window of Time

3. **Declining Trust**
   - 3% consider salespeople trustworthy
   - Continues to decline
     - **Edelman Trust Barometer**
   - Increasing reliance on peers rather than sales professionals
Latest Data Shows A Clear Path

• There is a clear path to navigating both sets of obstacles.

• Surprised to Discover:
  – Sales **NOT** using highest leverage points in prospecting.
  – Minor adjustments create **massive improvements** in effectiveness.
4 Key Areas

1. Market
2. Message
3. Medium
4. Motivation
The Answer is Right Under Our Nose

“Despite all the new shiny objects promising to be the silver bullet to solve all challenges, the data shows that the most effective path is right under our nose in the area of approach and execution.”

– David Kane, Executive Director HCA
Key Point # 2

Small changes make a big difference.
Focus Area #1 – Market (targeting)
What’s the single biggest thing you can do to improve sales?

• Single Most Effective Thing – Sell only to ideal candidates.
• Reason – Everything else is downstream from there.

“No amount of brilliant messaging, automation or brute force effort can compensate for selling to the wrong prospect.”
Focus Area #1 – Market

• Crime – Selling to the wrong prospect.
• Selling to the **wrong prospect** is the biggest waste of time ever:
  – More objections
  – Longest / slowest sales cycle
  – Lowest Margins / Commissions
  – Biggest headaches after the sale
  – Become anti-references

• Pareto Principle
  – 20% of opportunities consume 80% of time
Groundhog Day

- Reps engage anything that moves
  - Good or Bad

- Continue to pour time into weak prospects
  - Especially true for new reps
    - Can’t recognize an ideal customer
    - Desperate to fill pipeline
    - Prove themselves

- Deals Stall

- Call Manager for Some Magic
  - That will turn bad prospects into good ones

Discipline needs to be applied at the beginning of the process.
Key Point # 3

You’re better off finding an ideal prospect than continuing to waste time on non-ideal customers.
Key Point # 4

The highest leverage of your time is to focus on ideal, high-probably prospects to begin with.
“You can’t take a Walmart prospect and turn them into a Nordstrom's customer.”
- Mark Hunter, The Sales Hunter
Ideal Customer Criteria – Areas To Consider

### Demographics
- Industry
- Segment (Enterprise, Mid-market, Small Biz)
- Size (measured by what metrics? employees, revenue, etc.)
- Volume Drivers
- Centralized/Decentralized
- Growing/Stable/Shrinking
- Has X Problem/Situation/Issue
- Type of need/specific requirement
- Geographic Location (Local/multi-state/multi-national)
- X Systems in place/not in place
- Affected by X legislation/regulation
- Uses X Strategy/methodology
- Title / Years on Job
- Role in Decision-Making Process
- Trigger Events

### Psychographics
- Willing to address problem/improve situation
- Has X goals/wants/business objectives
- Feeling X challenge(s)
- Biggest Concern
- Attitude towards improvement
- Pressure from boss/supervisor to X
- Is afraid of X
- Personality
- Influenced By X
- Early adopter or conservative
- Reputation/relationship in industry
- Evaluated by X
- Negative Criteria - Doesn't have X
Process to Identify Your Ideal Customer

Steps:
1. List Your Best Customers
2. Identify Their Defining Attributes
3. Identify The Commonalities Between Them

• Creates a Template of Criteria for Targeting Ideal Customers
Criteria for Identifying & Targeting Ideal Customers

Two Important Criteria for Targeting Ideal Customers Often Missed

1. Problems

2. Leverage
Key Point # 5

The problems you solve determine who you sell to.
(problems are markets)
Conduct a Problem Inventory

• **Problem Inventory** – Collection of problems you solve for clients.

• **IMPORTANT:** You **MUST** know:
  – Specific problems your prospect has
  – Value you bring
  – **Before** you can craft a message that will trigger engagement

• **Target Market**
  – Who has the problems you solve?
  – Who has those problems in the biggest way?
Leverage

• **Sales Leverage** – Proof that you can solve problems and affect positive change for your clients.

• **Sales Leverage is about having proof**
  – Of all the elements that improve response – proof is the most important
  – Focusing on proof improves response more than any other element

• **It’s important that we target areas where we actually HAVE proof**
  – Don’t go into battle without a sword.
Key Point # 6

Focus on target markets where you have the strongest proof.
What Constitutes Proof?

Top 2 Things That Constitute Proof:

1. Recognizable, Referenceable Clients
   - Testimonials
   - Case Studies
   - Market Share / Large Numbers of Clients

2. Objective 3rd Party Endorsements
   - Awards
   - Studies
   - Reviews
Focus Area #1 – Target Market

Key Takeaway:

As you identify your ideal targets, take into account:
1. Demographics
2. Psychographics
3. The problems you solve
4. The leverage you have at your disposal

This is a super-high-leverage strategy.
Example of Targeting Success – Hill-Rom

• Hill-Rom: Manufactures hospital beds & furniture

• Simply changing the accounts targeted by sales, Hill Rom:
  – Increased Revenue by $70M
    • 11% increase in revenue per employee for a 10,000 employee company
  – Increased product margin by 6.7%
  – Increased operating income by 51%
  – Lowered Costs by 1%
  – Improved Customer Sat 6%

Targeting ideal customers makes a huge difference.
Take Home Action Item – Target Market

Take Home Action Item:

1. Identify your top clients
2. Identify key common attributes in:
   - Demographics
   - Psychographics
3. Conduct a problem inventory
   - What problems do you solve for these clients?
4. Inventory Proof
   - What leverage (proof) do you have that you can use to engage new opportunities?
Focus Area #2 – Message
Inbound vs. Outbound Starting Points & Channels

**Outbound Sales**
- List of Leads
- Engage With Leads Using Outbound Channels (referral, phone, email, trade shows, etc.)
- Create Conversation

**Inbound Sales**
- Create Content
- Promote Content Using Inbound Channels (website content, video, articles, whitepapers, blogs, social media, SEO, etc.)
Key Point # 7

We are dependent on messaging to engage our target audience.
Workshop EXERCISE – Value Proposition

60 Seconds – Individually, in your notebook:

1. Quickly write your core value proposition
   – This is the key value that your customers get from working with you
What is your core value proposition?
Key Point # 8

Your core value proposition is mission-critical information that you must have to succeed in selling.
Crafting A Value Proposition

• A Basic Value Proposition Has 3 Components:
  1. **Metric** – The measurable component of the thing you improve. It answers the question "How do you measure whether or not you are doing well in this area?"
  2. **A Direction** – Answers the question, “What is happening to the value of this Metric?” Is it going up or down?
  3. **Magnitude** – Magnitude answers “How much...?” That is, how much is the metric going up or down? What’s the value of the change?

\[
\text{Basic Value Prop} = \text{Direction} + \text{Metric} + \text{Magnitude}
\]

• Example: We improve close ratios by an average of 22%.

• Your Value Prop Answers The Question: “Why should this client meet with me?”
Take Home Action Item – Value Proposition

Take Home Action Item:
1. Develop / Identify Your Value Propositions
2. For Each Product & Function
3. For Your Business as a Whole
4. Make it measurable using:
   – Metrics
   – Direction
   – Magnitude
Key Point # 9

Customers follow a predictable process when making decisions.
Buyer’s Journey

The Buyer’s Journey

Unaware
Not in the Market

Do I have a problem?

How big is my problem?

How can I solve my problem?

Which solution is best?

Is this really worth doing?

What are the terms?

How do we begin?

Life is Great!

Let’s get started!
Buyer’s Journey

The Buyer’s Journey

Life is Great!

Awareness

Unaware
Not in the Market

Defining Problem

Do I have a problem?

How big is my problem?

Consider Options

How can I solve my problem?

Evaluate Solutions

Which solution is best?

Justify decision

Is this really worth doing?

Final Selection

What are the terms?

How do we begin?

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The Buyer’s Journey Doesn’t Change For Inbound or Outbound

- Outbound Sales More Likely to Have Conversations in the Awareness Phase.
The Most Common Mistake in Messaging

- Trying to have a conversation in one stage when the customer is in another.
The Golden Rule of Sales Engagement

Meet The Customer Where They Are
Crafting Valuable Messages – The 3 Whys

• For initial message creation the questions of the buyer’s journey can be simplified down to:
  – Why Change?
  – Why Now?
  – Why You?
Answering The Three Why’s

• Why Change?
  – Approx 50% of all sales are lost to “no-decision”
  – “No-Decision” the biggest competitor for most organizations
  – Why? Failure to create a compelling business case for change

• Why Now?
  – Why is it urgent that act soon?
  – Why should our problem be at the top of their list?

• Why You?
  – Why should the customer pick you over all the other solutions out there?
  – Important to address possible solutions outside your class of solutions.
In outbound, because we are engaging net-new prospects, we primarily speak to:
- Why Change?
- Why Now?

When we answer these in a compelling way success raises dramatically.
High-Impact Messaging Framework

- Based on brand-new, cutting-edge research
- Can be used for all messaging
- Especially good at addressing
  - “Why Change”
  - “Why Now”
- Recent studies prove this formula is the best at getting customers to:
  - Engage (i.e. change)
  - Act Now
High-Impact Messaging Framework

Craft high-impact messaging using any channel.

Driver / Trigger Event → Problem / Issue → Goal / Key Strategic Initiative → Insight / Unconsidered Needs → Value Prop / Outcome Statement → Feature / Mechanism of Action → Proof / Results → 3rd Party Validation

References / Social Proof

OutBound
Prospecting, Pipeline, Productivity

Sponsored by:
 Outreach
 ConnectAndSell™

zoominfo.
Developing a High-Impact Message

Driver / Trigger Event → Problem / Issue → Goal / Key Strategic Initiative → Insight / Unconsidered Needs → Value Prop / Outcome Statement → Feature / Mechanism of Action → Proof / Results → 3rd Party Validation

References / Social Proof → Statistics

OutBound Prospecting. Pipeline. Productivity
Sponsored by: Outreach, ConnectAndSell, zoominfo
The Study:
- Dr. Nick Lee, professor of marketing at the Warwick Business School in Coventry U.K.
- 312 executive participants at companies with:
  - $100 million or more in revenues
  - Budget and decision-making responsibilities

Purpose: Discover which messaging strategy is the most compelling “Why Now” message.

Tested Six Message Conditions
1. Business Issue - External factors and business initiatives
2. Loss - Details about a loss to be avoided
3. Gain - Details about a potential positive gain
4. Unconsidered Needs - Introduces an unsuspected threat
5. Heavy ROI - Hard numbers with detailed ROI breakdown
6. Change Story - Business change story with a light ROI component
EXAMPLE: High-Impact Messaging Framework

Drivers:
- Prospecting getting harder
- Sales Message Overload
- Internet
- Decreased Attention Span

Goal:
- Prospecting
- Sales

Challenge:
- Prospecting
- Sales

Insight/Unconsidered Needs:
- Typical strategy = "more activity"
- New developments diminish "more activity" strategy
- Robotic Competition scales up message activity to unbelievable levels
- Sophisticated Customers/High Expectations
- Declining Trust & Peer Preference

Insight:
Data proves:
- Clear path solves both sets of challenges
- Haven’t focused on highest leverage areas

Value Prop / Outcome Statement:
- Small Changes Make a Big Difference
- Minor adjustments in prospecting improves results by up to thousands of a percent.

Mechanism of Action:
- Minor adjustments in 4 areas:
  1. Market
  2. Message
  3. Medium
  4. Motivation

Proof:
- This presentation
- More coming up
My Own Experience

Revenue Cycle Division

• In One Year:
  • From 3 Turnkey Sales to 51
  • 1700% improvement
  • From 3 a year to nearly one a week
  • I want that for you!
Key Point # 10

Messaging done right will have a massive impact on your success.
Focus Area #3 – Medium
Zero to Hero – How much work is here?

• Zero Pipeline
• $2 Million Quota
• I’m ready to do the work...
• But how should I spend my time?
My burning questions...

• How many *deals* do I need to be working?
• How many *leads* to am I going need?
• How many *calls* should I be making?
So I chunked it down...
How many deals?

- My Quota = $2,000,000
- Average deal size = $200,000
- I needed **10 deals** to hit quota
  \[-\frac{\$2,000,000}{\$200,000} = 10\]
How many opportunities?

- I need 10 deals
- Company Close Ratio = 33%
- I needed **30 opportunities**
  \[-10 \text{ deals} / 33\% = 30 \text{ opportunities}\]
How many leads?

• I need 30 opportunities
• What’s my call conversion rate?
  – I had no reference.
  – I used 3%
• That meant I’d need to make 1,000 calls
  – 30 opportunities / 3% = 1,000 attempts
1,000 calls!
How much time will that take?
How much time should I spend calling?

- I need 1,000 calls
- I knew how long it took to make a call.  
  - 2-3 minutes per call attempt
- I needed **50 hours** to fill my pipeline  
  - 1,000 calls x 3 minutes = 3,000 minutes  
  - 3,000 minutes / 60 = 50 hours
How long will it take to fill my pipeline?

- I need 50 hours of calls
- I want that in 4 weeks
- I need to call for **2.5 hours per day**
  - $50 \text{ hours} / 20 \text{ business days} = 2.5 \text{ hours/day}$

- Anyone surprised?
  - That’s a $6,000,000 pipeline in 4 weeks
Key Point # 11

Clarity around activities makes every goal easier.
Key Point # 12

Uncertainty causes paralysis.
Components of the Medium Challenge

1. What **channels** should I use to engage?
2. What are the **ideal activities** I need to execute?
Q&A – Activities & Channels

• Q. Is cold calling the channel to reach customers?
• A. No.

• Q. Can we succeed with cold calling?
• A. Absolutely. (And cold calling should be part of your mix)

• Q. Are there other channels that might perform better than cold calling?
• A. Absolutely.

As a whole, sales hasn’t focused on the highest leverage point in prospecting.
Which Sales Channels Convert the Best?

Conversion by Channel (Lead to Opportunity)

- Referrals: 100%
- Seminars / Events: 80%
- Networking: 60%
- Webinars: 40%
- In-Person Prospecting: 20%
- Trade Show / Society Mtgs: 10%
- Cold Calling: 0%
- Social Media: 0%
- Email: 0%

Lead to Opportunity Conversion %
Why Are Referrals So Effective?

Trusted Advisor
Statistics on Referrals

• Engagement
  – Peers influence 90% of all buying decisions.
  – 84% of decision-makers begin their process with a referral.
  – B2B buyers are 500% more likely to engage with a referral.
  – Appointments are 420% more likely with a personal connection.

• Conversion
  – Referrals convert to sales 300-500% higher than any other channel.

• Value
  – Referred customers spend 13.2% more than non-referred customers.
  – Referred customer have 16-25% higher lifetime value than non-referred customers.
  – Salespeople who actively seek referrals earn 400-500% more than those who don’t.

Sources: Influative, Sales Benchmark Index, International Data Corporation, LinkedIn, IncentiveFox, Nielson, DemandGen, Journal of Marketing, Wharton, TopSalesWorld, CustomerThink
My Personal Data on Referrals

Q. “What made you go to [channel] in the first place?”

74%

Of all leads could be traced back to a referral source.

Supporting Data:
Q. What percentage of business comes from referrals?

• New York Times – 65%
• BNI Global – 70%
Key Point # 13

Referrals are the highest-leverage, most underutilized channel in sales.
## Why Don’t We Leverage Referrals?

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>They forget to ask. No process or system.</td>
<td>- Let clients know you do business by referral.</td>
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<td></td>
<td>- Implement a process &amp; system for asking for referrals.</td>
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<td>- Get sold on your solution. Selling is serving.</td>
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<td>Asking in the wrong way.</td>
<td>Learn the most successful way to ask for referrals.</td>
</tr>
<tr>
<td>Fear rejection.</td>
<td>Ask in a way that won’t cause you to get rejected.</td>
</tr>
<tr>
<td>Feel they haven't earned it yet.</td>
<td>- Change your mindset.</td>
</tr>
<tr>
<td></td>
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<tr>
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- Implement a process & system for asking for referrals. |
| Lack confidence.                   | - Get sold on your solution. Selling is serving.  
- When you’re selling something you’re improving their lives. |
| Asking in the wrong way.           | Learn the most successful way to ask for referrals.                                                                                     |
| Fear rejection.                    | Ask in a way that won’t cause you to get rejected.                                                                                      |
| Feel they haven't earned it yet.   | - Change your mindset.  
- You don’t have to wait till you’ve “earned” it to ask for referrals.                                                                |
| Feel great service alone is enough. | It isn’t. The sale will not close itself. You must ask.                                                                                |
The Most Successful Way to Get Referrals

• **Key Steps**
  – Research the **EXACT** name you want an introduction to before you meet.
  – Ask for just **one** name at a time.
  – Keep your client informed on your progress.
Focus Area #3 – Medium Getting Tactical
What Does It Mean to Get Tactical?

• Tactical – Relating to actions carefully planned to gain a specific end.

“Every minute you spend in planning saves 10 minutes in execution; this gives you a 1,000 percent Return on Energy!” - Brian Tracy
## Your Tactical Plan – Metrics

### 4 Steps to Getting Tactical

1. Define Objectives
2. Select Ideal Channels for Engagement
3. Calculate Activities
4. Incorporate Into Daily Calendar

<table>
<thead>
<tr>
<th>Define Objectives</th>
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<tbody>
<tr>
<td>• Company Goal</td>
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<tr>
<td>• Income Goal</td>
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<table>
<thead>
<tr>
<th>Set Timeframe</th>
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<tbody>
<tr>
<td>• Time to Accomplish Objectives</td>
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<table>
<thead>
<tr>
<th>Define Your Metrics</th>
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<tbody>
<tr>
<td>• Average Deal Size</td>
</tr>
<tr>
<td>• Salary</td>
</tr>
<tr>
<td>• Average Commission Rate</td>
</tr>
<tr>
<td>• Current Pipeline</td>
</tr>
<tr>
<td>• General Close Ratio</td>
</tr>
<tr>
<td>• Sales Cycle Time</td>
</tr>
<tr>
<td>• Channel Conversion Metrics</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Calculate Intermediate Targets</th>
</tr>
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<tbody>
<tr>
<td>• Total Needed Pipeline</td>
</tr>
<tr>
<td>• # Opportunities</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Select Ideal Channels</th>
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<tr>
<td>• Target Channels</td>
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<table>
<thead>
<tr>
<th>Calculate Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Total Activities per Channel</td>
</tr>
<tr>
<td>• # Activities per Day</td>
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<tr>
<th>Incorporate Into Daily Schedule</th>
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<tbody>
<tr>
<td>• Tasks</td>
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<tr>
<td>• Time Blocking</td>
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Download the Tactical Prospecting Planning Tool here:

https://puremuir.com/TacTool
## Setup

### JAMES MUIR Commission Activity Planning Worksheet

<table>
<thead>
<tr>
<th>Company Goal</th>
<th>Personal Goal</th>
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</thead>
<tbody>
<tr>
<td><strong>Plan Starts On:</strong></td>
<td><strong>Commission at Quota</strong></td>
</tr>
<tr>
<td>Quota Goal:</td>
<td>$192,500</td>
</tr>
<tr>
<td>By Date:</td>
<td><strong>Avg Commission Rate</strong></td>
</tr>
<tr>
<td>Revenue to Date:</td>
<td>5.50%</td>
</tr>
<tr>
<td>Additional Revenue Needed:</td>
<td><strong>Personal Income Goal</strong></td>
</tr>
<tr>
<td>$0</td>
<td>$350,000</td>
</tr>
<tr>
<td>$3,500,000</td>
<td><strong>Salary</strong></td>
</tr>
<tr>
<td><strong>Pipeline Value:</strong></td>
<td><strong>Required Sales</strong></td>
</tr>
<tr>
<td>Current # of Good Opportunities:</td>
<td>$4,545,455</td>
</tr>
<tr>
<td>Close Ratio (%):</td>
<td><strong>Average Deal Size</strong></td>
</tr>
<tr>
<td>20%</td>
<td>$250,000</td>
</tr>
<tr>
<td><strong>Average Deal Size:</strong></td>
<td><strong>Average Sales Cycle</strong></td>
</tr>
<tr>
<td>Average Sales Cycle (in days):</td>
<td>90</td>
</tr>
<tr>
<td><strong>Total Additional Pipeline Value Needed:</strong></td>
<td><strong>Plan Start &amp; End</strong></td>
</tr>
<tr>
<td>Total # of Additional Opportunities Needed:</td>
<td>04/01/2018</td>
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<tr>
<td>Days in Plan Period</td>
<td>12/31/2018</td>
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<tr>
<td>Days Left to Add New Opportunities:</td>
<td>$0</td>
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<td><strong>Ideal # Good Opportunities</strong></td>
<td>70.0</td>
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<tr>
<td><strong>Total Opportunities</strong></td>
<td>0</td>
</tr>
</tbody>
</table>
### Setup

**Company Goal**

- **Plan Starts On:** 04/01/2018
- **Quota Goal:** $3,500,000
- **By Date:** 12/31/2018
- **Revenue to Date:** $0
- **Additional Revenue Needed:** $3,500,000

**Pipeline Value:**

- **Current # of Good Opportunities:** 0
- **Close Ratio (%):** 20%
- **Average Deal Size:** $250,000
- **Average Sales Cycle (in days):** 90

**Total Additional Pipeline Value Needed:** $17,500,000

**Total # of Additional Opportunities Needed:** 70.00

**Days in Plan Period:** 274

**Days Left to Add New Opportunities:** 184

**Ideal # Good Opportunities**

- **Ideal # Good Opportunities:** 70.0
- **Total Opportunities:** 0

**Personal Goal**

- **Commission at Quota:** $192,500
- **Avg Commission Rate:** 5.50%
- **Personal Income Goal:** $350,000
- **Salary:** $100,000
- **Required Sales:** $4,545,455

- How much additional pipeline you need
- How many additional opportunities you need
- How many days left in selling period
- How many days left to add opportunities
## Setup

### JAMES MUIR Commission Activity Planning Worksheet

<table>
<thead>
<tr>
<th>Company Goal</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Starts On:</td>
<td>04/01/2018</td>
</tr>
<tr>
<td>Quota Goal:</td>
<td>$3,500,000</td>
</tr>
<tr>
<td>By Date:</td>
<td>12/31/2018</td>
</tr>
<tr>
<td>Revenue to Date:</td>
<td>$0</td>
</tr>
<tr>
<td>Additional Revenue Needed:</td>
<td>$3,500,000</td>
</tr>
<tr>
<td>Pipeline Value:</td>
<td>$0</td>
</tr>
<tr>
<td>Current # of Good Opportunities:</td>
<td>0</td>
</tr>
<tr>
<td>Close Ratio (%):</td>
<td>20%</td>
</tr>
<tr>
<td>Average Deal Size:</td>
<td>$250,000</td>
</tr>
<tr>
<td>Average Sales Cycle (in days):</td>
<td>90</td>
</tr>
<tr>
<td>Total Additional Pipeline Value Needed:</td>
<td>$17,500,000</td>
</tr>
<tr>
<td>Total # of Additional Opportunities Needed:</td>
<td>70.00</td>
</tr>
<tr>
<td>Days in Plan Period</td>
<td>274</td>
</tr>
<tr>
<td>Days Left to Add New Opportunities:</td>
<td>184</td>
</tr>
<tr>
<td>Ideal # Good Opportunities</td>
<td>70.0</td>
</tr>
<tr>
<td>Total Opportunities</td>
<td>0</td>
</tr>
</tbody>
</table>

### Personal Goal

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Commission at Quota</td>
<td>$192,500</td>
</tr>
<tr>
<td>Avg Comission Rate</td>
<td>5.50%</td>
</tr>
<tr>
<td>Personal Income Goal</td>
<td>350,000</td>
</tr>
<tr>
<td>Salary</td>
<td>100,000</td>
</tr>
<tr>
<td>Required Sales</td>
<td>$4,545,455</td>
</tr>
</tbody>
</table>

---

**Personal Income Goal & Salary**

---

(OutBound: Prospecting, Pipeline, Productivity)
## Setup

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<table>
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<td>Salary</td>
<td>100,000</td>
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</table>

Average Commission Rate
## Important Lesson

### JAMES MUIR Commission Activity Planning Worksheet

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<thead>
<tr>
<th>Company Goal</th>
<th>Personal Goal</th>
</tr>
</thead>
<tbody>
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<td><strong>Plan Starts On:</strong></td>
<td><strong>Commission at Quota:</strong> $192,500</td>
</tr>
<tr>
<td><strong>Quota Goal:</strong></td>
<td><strong>Avg Commission Rate:</strong> 5.50%</td>
</tr>
<tr>
<td><strong>By Date:</strong></td>
<td><strong>Personal Income Goal:</strong> 350,000</td>
</tr>
<tr>
<td><strong>Revenue to Date:</strong></td>
<td><strong>Salary:</strong> 100,000</td>
</tr>
<tr>
<td><strong>$0</strong></td>
<td></td>
</tr>
<tr>
<td><strong>$3,500,000</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Additional Revenue Needed:</strong></td>
<td><strong>Required Sales:</strong> $4,545,455</td>
</tr>
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<td><strong>Pipeline Value:</strong></td>
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<td><strong>Current # of Good Opportunities:</strong></td>
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<tr>
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</tr>
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<td><strong>Days Left to Add New Opportunities:</strong></td>
</tr>
<tr>
<td><strong>184</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Ideal # Good Opportunities</strong></td>
<td><strong>Total Opportunities</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Sales Required to Earn Personal Goal**

**Sales Required to Hit Quota**

Which one is driving you higher?
## Manage Channels

### Channel Planner

**1. Manage Channels**

<table>
<thead>
<tr>
<th>Channel</th>
<th>Avg Time / Activity</th>
<th>Max / Period</th>
<th>Conversion to Opportunities</th>
<th>Close Ratio</th>
<th>Sales Cycle (Days)</th>
<th>Average Deal Size</th>
<th>Commission / Deal</th>
<th>$ / Hour</th>
<th>Min Time / Deal</th>
<th># Activities / Deal</th>
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<tbody>
<tr>
<td>Cold Calling</td>
<td>0 0 10 1</td>
<td></td>
<td>1.0%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$165</td>
<td>10:30:20</td>
<td>500</td>
</tr>
<tr>
<td>Email</td>
<td>0 0 10 1</td>
<td></td>
<td>1.0%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$165</td>
<td>10:03:20</td>
<td>500</td>
</tr>
<tr>
<td>In-Person Prospecting</td>
<td>0 0 45 1</td>
<td></td>
<td>3.0%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$110</td>
<td>15:05:15</td>
<td>187</td>
</tr>
<tr>
<td>Networking</td>
<td>0 2 0 5</td>
<td></td>
<td>3.0%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$202</td>
<td>08:04:00</td>
<td>34</td>
</tr>
<tr>
<td>Referrals</td>
<td>0 1 15 1</td>
<td></td>
<td>80.0%</td>
<td>70.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$5,500</td>
<td>00:02:30</td>
<td>2</td>
</tr>
<tr>
<td>Seminars</td>
<td>2 0 0 30</td>
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<td>5.0%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$215</td>
<td>08:00:00</td>
<td>4</td>
</tr>
<tr>
<td>Social Networking</td>
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<td></td>
<td>0.5%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$83</td>
<td>20:06:40</td>
<td>1000</td>
</tr>
<tr>
<td>Trade Show / Society Meetings</td>
<td>2 0 0 100</td>
<td></td>
<td>5.0%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$859</td>
<td>02:00:00</td>
<td>1</td>
</tr>
<tr>
<td>Webinars (promoting)</td>
<td>0 0 3 1</td>
<td></td>
<td>5.0%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$2,750</td>
<td>00:05:00</td>
<td>100</td>
</tr>
<tr>
<td>Combo - Phone, Voicemail, Email, Social</td>
<td>0 0 15 1</td>
<td></td>
<td>1.5%</td>
<td>20.0%</td>
<td>90</td>
<td>$250,000</td>
<td>$13,750</td>
<td>$165</td>
<td>10:03:30</td>
<td>334</td>
</tr>
</tbody>
</table>

**Total**                                                                 90
### Manage Channels

#### 1. Manage Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>Avg Time / Activity</th>
<th>Conversion to Opportunities</th>
<th>Revenue Generated Per Hour</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Days</td>
<td>Hours</td>
<td>Minutes</td>
</tr>
<tr>
<td>Cold Calling</td>
<td>0</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Email</td>
<td>0</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>In-Person Prospecting</td>
<td>0</td>
<td>0</td>
<td>45</td>
</tr>
<tr>
<td>Networking</td>
<td>0</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Referrals</td>
<td>0</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td>Seminars</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Social Networking</td>
<td>0</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Trade Show / Society Meetings</td>
<td>2</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>Webinars (promoting)</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Combo - Phone, Voicemail, Email, Social</td>
<td>0</td>
<td>0</td>
<td>15</td>
</tr>
</tbody>
</table>

Total: 90
Activity Planning

Green = Sufficient Activities to Hit That Goal

Activity Target Summary

<table>
<thead>
<tr>
<th>Activity Plan</th>
<th>Deals</th>
<th>Pipeline</th>
<th>Revenue</th>
<th>Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Goal</td>
<td>14</td>
<td>$17,500,000</td>
<td>$3,500,000</td>
<td>$192,500</td>
</tr>
<tr>
<td>Personal Goal</td>
<td>19</td>
<td>$22,727,273</td>
<td>$4,545,455</td>
<td>$250,000</td>
</tr>
</tbody>
</table>

Planned

<table>
<thead>
<tr>
<th>Channel</th>
<th>Deals</th>
<th>Pipeline</th>
<th>Revenue</th>
<th>Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>14</td>
<td>$17,500,000</td>
<td>$3,500,000</td>
<td>$192,500</td>
</tr>
</tbody>
</table>

OutBound
Prospecting. Pipeline. Productivity
Sponsored by:

Outreach
ConnectAndSell
zoominfo
Adding Activities

### Activity Target Summary

<table>
<thead>
<tr>
<th>Activity Plan</th>
<th>Deals</th>
<th>Pipeline</th>
<th>Revenue</th>
<th>Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Goal</td>
<td>14</td>
<td>$17,500,000</td>
<td>$3,500,000</td>
<td>$192,500</td>
</tr>
<tr>
<td>Personal Goal</td>
<td>19</td>
<td>$22,727,273</td>
<td>$4,545,455</td>
<td>$250,000</td>
</tr>
</tbody>
</table>

### 3. Monthly Activity Planner

<table>
<thead>
<tr>
<th>Channel</th>
<th>$ / Hour</th>
<th># Activities / Deal</th>
<th># Activities in Plan Period</th>
<th>Total Plan Time (dd:hh:mm)</th>
<th>Time Per Day (hh:mm)</th>
<th>Deals</th>
<th>Pipeline</th>
<th>Revenue</th>
<th>Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cold Calling</td>
<td>$185</td>
<td>500</td>
<td></td>
<td>00:00:00</td>
<td>00:00:00</td>
<td>0</td>
<td>$0</td>
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<tr>
<td>Email</td>
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<td>00:00:00</td>
<td>00:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>In-Person Prospecting</td>
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<td>167</td>
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<td>00:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Networking</td>
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<td>34</td>
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<td>00:00:00</td>
<td>00:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Referrals</td>
<td>$5,500</td>
<td>2</td>
<td>10</td>
<td>01:04:30</td>
<td>00:04:00</td>
<td>5</td>
<td>$1,785,714</td>
<td>$1,250,000</td>
<td>$68,750</td>
</tr>
<tr>
<td>Seminars</td>
<td>$215</td>
<td>4</td>
<td></td>
<td>00:00:00</td>
<td>00:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Social Networking</td>
<td>$83</td>
<td>1,000</td>
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<td>00:00:00</td>
<td>00:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Trade Show / Society Meetings</td>
<td>$859</td>
<td>1</td>
<td></td>
<td>00:00:00</td>
<td>00:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Webinars (promoting)</td>
<td>$2,750</td>
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<td></td>
<td>00:00:00</td>
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<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Combo - Phone, Voicemail, Email, Social</td>
<td>$165</td>
<td>334</td>
<td></td>
<td>00:00:00</td>
<td>00:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
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<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td>01:04:30</td>
<td>00:00:04</td>
<td>5</td>
<td>$1,785,714</td>
<td>$1,250,000</td>
<td>$68,750</td>
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OutBound
Prospecting, Pipeline, Productivity

Sponsored by:

- Outreach
- ConnectAndSell
- ZoomInfo
### Activity Target Summary

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<td>$250,000</td>
</tr>
<tr>
<td>Placed</td>
<td>11</td>
<td>$13,750,000</td>
<td>$2,750,000</td>
<td>$151,250</td>
</tr>
<tr>
<td>Company Goal</td>
<td>14</td>
<td>$17,500,000</td>
<td>$3,500,000</td>
<td>$192,500</td>
</tr>
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</table>

### Monthly Activity Planner

<table>
<thead>
<tr>
<th>Channel</th>
<th>Add New Channel</th>
<th>$ / Hour</th>
<th># Activities / Deal</th>
<th># Activities in Plan Period</th>
<th>Total Plan Time (dd:hh:mm)</th>
<th>Time Per Day (hh:mm)</th>
<th>Deals</th>
<th>Pipeline</th>
<th>Revenue</th>
<th>Commission</th>
</tr>
</thead>
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<td></td>
<td>$185</td>
<td>500</td>
<td></td>
<td>0:00:00</td>
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<td>$0</td>
<td>$0</td>
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</tr>
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<td>0:00:00</td>
<td>0:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>In-Person Prospecting</td>
<td></td>
<td>$110</td>
<td>167</td>
<td></td>
<td>0:00:00</td>
<td>0:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Networking</td>
<td></td>
<td>$202</td>
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<td></td>
<td>0:00:00</td>
<td>0:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
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<tr>
<td>Referrals</td>
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<td>00:04</td>
<td>5</td>
<td>$1,785,714</td>
<td>$1,250,000</td>
<td>$68,750</td>
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</tr>
<tr>
<td>Seminars</td>
<td>$215</td>
<td>1</td>
<td>100</td>
<td>0:00:00</td>
<td>0:00:00</td>
<td>0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Social Networking</td>
<td>$83</td>
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</table>
Monthly Activity

Calculates Number of Activities by Month

Opportunities Entered During This Time May Not Close This Year
### Activities Per Day

#### Activities / Day Column

<table>
<thead>
<tr>
<th>Activity</th>
<th>Days</th>
<th>Payroll</th>
<th>Revenue</th>
<th>Commission</th>
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<tr>
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#### Monthly Target Summary

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<td>$71,000</td>
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### 3. Monthly Activity Planner

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<tr>
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### Time Allocation

- **Total Activities:** 1000
- **Total Time Hours:** 1000
- **Total Fee:** 1000
- **Total Revenue:** 1000
- **Total Commission:** 1000

**OutBound**

Prospecting. Pipeline. Productivity

Sponsored by:

- Outreach
- ConnectAndSell
- Zoominfo
### 3. Monthly Activity Planner

<table>
<thead>
<tr>
<th>Channel</th>
<th>Add New Channel</th>
<th>$ / Hour</th>
<th># Activities / Deal</th>
<th># Activities in Plan Period</th>
<th>Total Plan Time (ddhhmm)</th>
<th>Time Per Day (hh:mm)</th>
<th>Deals</th>
<th>Pipeline</th>
<th>Revenue</th>
<th>Commission</th>
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<tbody>
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**Total**

|                |                 |          |                      |                             | 55:01:50                 | 00:02:24 | 15     | $14,285,714 | $3,750,000 | $208,250   |
Taking Cycle Time Into Account

Company Goal Met
But Not Personal Goal
Achieving Goals & Time Allocated

Company Goal Met

Personal Goal Met

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<th>Days</th>
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Time Allocated (Hours) 393
## Getting Tactical

### 1. Manage Channels

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<th>Days</th>
<th>Hours</th>
<th>Minutes</th>
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<th>Period</th>
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<th>$ / Hour</th>
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<td>$250,000</td>
<td>$13,750</td>
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<td>10:03:30</td>
</tr>
</tbody>
</table>

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**Outbound**

Prospecting, Pipeline, Productivity

**Sponsored by:**

- Outreach
- ConnectAndSell
- zoominfo
Getting Tactical

Company Goal Met
Personal Goal Met

From 26.7% to 21%
83 Hours Saved by Getting Tactical
4 Key Areas

• Market
• Message
• Medium
• Motivation
GET MOTIVATED, STAY MOTIVATED
WHAT DO YOU WANT?
Key Point # 14

Knowing WHAT you want is key for sustained motivation.
Your current job is an excellent vehicle to get you there…

IF you know what you want

Sales is an amazing profession, sales offers unlimited potential.

It Scales

• Sales is the 4th largest category of millionaires in the US
Millionaire Sales Professionals

<table>
<thead>
<tr>
<th>Sales Professionals Who Became Millionaires</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alfred Fuller - “Fuller Brush Man”</td>
</tr>
<tr>
<td>Bella Weems - Origami Owl</td>
</tr>
<tr>
<td>Ben Feldman - Insurance</td>
</tr>
<tr>
<td>Benjamin Franklin - Printing</td>
</tr>
<tr>
<td>BR Shetty - Medical Sales, NMC Healthcare</td>
</tr>
<tr>
<td>Brian Tracy - Human Development, Real-Estate, Imports, Distribution</td>
</tr>
<tr>
<td>Dale Carnegie - Author of How to Win</td>
</tr>
<tr>
<td>Friends &amp; Influence People</td>
</tr>
<tr>
<td>David Ogilvy - Hathaway</td>
</tr>
<tr>
<td>Erica Feidner - Steinway Pianos</td>
</tr>
<tr>
<td>Francis G. “Buck” Rodgers - IBM</td>
</tr>
<tr>
<td>Gary Vaynerchuk - Retail Wine, Social Media</td>
</tr>
<tr>
<td>Howard Schultz – Starbucks</td>
</tr>
<tr>
<td>Joe Girard - Automotive Sales</td>
</tr>
<tr>
<td>John H. Patterson - National Cash Register</td>
</tr>
<tr>
<td>John Paul DeJoria - Paul Mitchell Systems, Hair Products</td>
</tr>
<tr>
<td>Larry Ellison - Oracle</td>
</tr>
<tr>
<td>Mark Cuban - MicroSolutions &amp; others</td>
</tr>
<tr>
<td>Mary Kay Ash - Mary Kay Cosmetics</td>
</tr>
<tr>
<td>Napoleon Barragan - 1-800-Mattress</td>
</tr>
<tr>
<td>Napoleon Hill - Author, Reporter</td>
</tr>
<tr>
<td>Nick Woodman - GoPro</td>
</tr>
<tr>
<td>Ralph Lauren - Fashion Designer</td>
</tr>
<tr>
<td>Ron Popeil - Ronco</td>
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<tr>
<td>Ross Perot - IBM</td>
</tr>
<tr>
<td>Steve Jobs - Apple Computer</td>
</tr>
<tr>
<td>Zig Ziglar - Door-to-door, Speaking</td>
</tr>
</tbody>
</table>

OutBound
Prospecting. Pipeline. Productivity

Sponsored by:
Outreach
ConnectAndSell™
zoominfo.
Key Point # 15

Motivation requires motive.
The Power of Why

Once you determined WHAT you want, ask yourself...

“Why do I want this?

• Willpower & fear of consequence only work for a brief time.

The answer to WHY is the source of **long-term, sustained motivation**.

It connects our goals & activities to the things we really care about.
Workshop EXERCISE – Discover Your Why

120 Seconds – Individually, in your notebook:

1. Write down what you want. What were you hoping to get out of Outbound 2018?
2. Below your response, answer this question:
   – “Because that will enable me to ______.”
3. If necessary, below your response, answer this question:
   – “Because that (the answer to the previous question) will enable me to ______.”
4. Repeat as many times as necessary.
   – You’ll know when you’ve gotten to the end.
The Importance of Necessity

• High performers are motivated by necessity.
• They tap into reasons they must perform well to stay motivated.
• That necessity typically combines:
  – Internal Standards
  – External Demands

• Big Question: “What is your necessity?”
  – Why is it necessary that you succeed now?
  – Who is counting on you?

• EXERCISE: Answer this question: Why is it necessary that I succeed now?
SIDEBAR – What do you want to be?
Keys to Motivation

1. Know your WHAT
2. Know your WHY
3. Understand the true nature of selling.
This is Kaiba Gionfriddo

• Born with a defective trachea
• Would stop breathing daily
• Parents would perform CPR on him daily
• Not expected to live
Dr. Glenn Green

University of Michigan
C.S. Mott Children’s Hospital
Biodegradable 3D Printed Medical Splint
The Tracheal Splint Saved Kaiba’s Life

• Dr. Green used an emergency provision to get FDA approval to use this tracheal splint.
• It saved Kaiba life.
Did You Know There Was a Sale Here?

• CT & MRI scans make 3D printing possible
• Lasers, 3D Printers & Biodegradable Materials are required too
• Responsible: Scott Hollister

• We don’t hear much about the selling part of these stories.
  – Yet there are thousands just like it.
Why Do We See These Differently Than Other Sales?

• We see more clearly the positive effects on people’s lives.
Key Point # 16

Selling is an act of service.
Every Solution Serves Someone

• Not every solution aims to address the same lofty goals.
  – Some feed the hungry
  – Some ease pain with medicines
  – Some allow communication or travel or great distances
  – Some offer services that allow individuals to focus on higher-value activities
  – And many more...

• But every solution sold:
  – Helps someone achieve a goal
  – Fulfill a dream
  – Avert a crisis
Helping a customer move towards their goal is an act of service.

- It shouldn’t be stressful. It should be easy.
Sometime We Lose Sight...

• Selfish Motives
• Administrative Load
• We forget we are serving

• It doesn’t have to be that way...
Remember: Selling is an Act of Service

• 100% Nobel & 100% Satisfying
  – If you make it that way

• Improves both our customers & ourselves in a virtuous cycle

  Motivating in its own right
Keys to Motivation

1. Know your WHAT
2. Know your WHY
3. Selling is serving
Summary – Look what you accomplished!

• Get out of your comfort zone!
  – Necessity is the crucible of learning

• Top Sales Challenges
  – Why Prospecting is Getting Harder
  – New Upcoming Sales Challenges

• A Clear Path With 4 Key Areas
  – Market
  – Medium
  – Message
  – Motivation

1. Market
  – Identifying & Selling to Ideal Customers
  – Problems Determine Markets
  – Sales Leverage
  – What Constitutes Proof

2. Message
  – Value Propositions
  – Messaging & The Buyer's Journey
  – The Golden Rule of Engagement
  – Answering the 3 Whys
  – High-Impact Messaging Framework

3. Medium
  – Activities
  – Channels
  – Which Sales Channels Convert Best
  – Leveraging Referrals
  – Tactical Prospecting

4. Motivation
  – Know Your WHAT (What do you want?)
  – Know Your WHY (Why do you want it?)
  – Selling is an Act of Service
Key Points

• Key Point # 1 - Necessity is the crucible of learning.
• Key Point # 2 - Small changes make a big difference.
• Key Point # 3 - You’re better off finding an ideal prospect than continuing to waste time on non-ideal customers.
• Key Point # 4 - The highest leverage of your time is to focus on ideal, high-probably prospects to begin with.
• Key Point # 5 - The problems you solve determine who you sell to.
• Key Point # 6 - Focus on target markets where you have the strongest proof.
• Key Point # 7 - We are dependent on messaging to engage our target audience.
• Key Point # 8 - Your core value proposition is mission-critical information that you must have to succeed in selling.
• Key Point # 9 - Customers follow a predictable process when making decisions.
• Key Point # 10 - Messaging done right will have a massive impact on your success.
• Key Point # 11 - Clarity around activities makes every goal easier.
• Key Point # 12 - Uncertainty causes paralysis.
• Key Point # 13 - Referrals are the highest-leverage, most underutilized channel in sales.
• Key Point # 14 - Knowing WHAT you want is key for sustained motivation.
• Key Point # 15 - Motivation requires motive.
• Key Point # 16 - Selling is an act of service.
Tools For Your Success

James Muir

- Download the Tactical Prospecting Planning Tool For FREE Here: https://puremuir.com/TacTool
- Download the Tactical Prospecting Slides: https://puremuir.com/resources
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Pay It Forward

I’ll sum up the key to success in one word: generosity.

Keith Ferrazzi
THANK YOU