

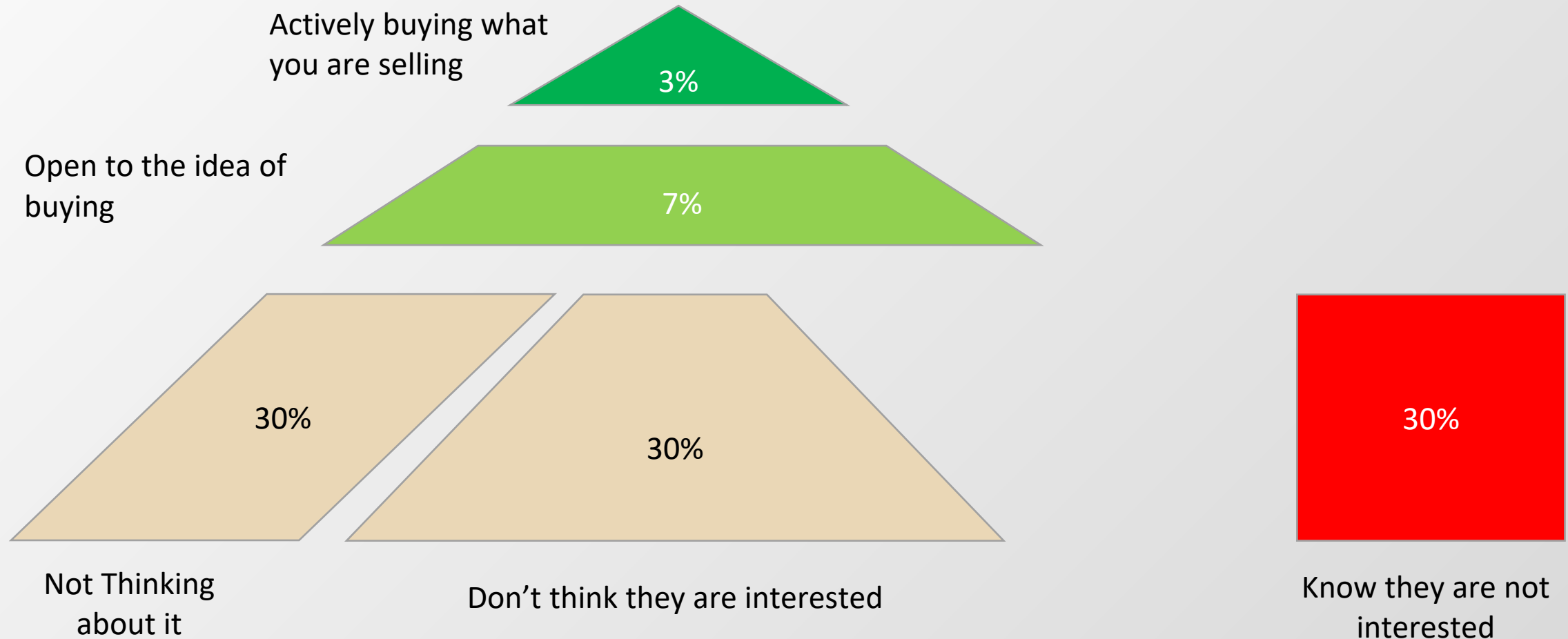


3 Part Formula to a Healthy Sales Pipeline

*Aligning Customer Success, INBOUND and OUTBOUND into ALLBOUND
and Creating More New Sales Opportunities*

September 29, 2021

Who's Buying



**Let's prospect 70% versus
3-10%, okay?**

Deliver the Right Message

to the Right Target

at the Right Time

through the Right Medium

EPOCH
EBOCH
SALES MANAGEMENT SOLUTIONS



Typical Challenges

- Work sales funnel from the bottom up, creating “roller coaster effect”
- Salespeople are winging it
- Underutilized technology
- Lack of effective management
- Sales compensation not aligned with new business development goals
- Failure to evaluate what is working and what is not working

Program Highlights

- 3 “must do” items to lead your sales team
 - Or yourself
- Complete ALLBOUND process to create more opportunities
- New opportunity process “bucket” concept
 - Leads to a repeatable framework to create more new opportunities
 - How to build your company toolkits/playbooks for each “bucket”
- Key coaching tips to develop “sales hunters”
 - Or yourself

LEARN



3 Part Formula to a Healthy Sales Pipeline

**Prepare
Foundational
Elements**

**Design a
Blueprint for
Success**

**Accelerate the
Process**



Prepare Foundational Elements

New Business Development Culture/Mindset

- Hire people with the right stuff
 - With grit and resilience
- Set New Opportunity goals
 - Track weekly
- Prospecting Priorities
 - Put it on the calendar
- Sales Compensation
 - Support new business development goals



“Everything flows from culture. Culture is everything.”

Get the Targeting Right

- Building Ideal Client Profiles
- Written target lists: finite, focused and workable
- Good, clean data



“The List is the strategy. Don’t leave this to chance.”

Get the Sales Messaging Right

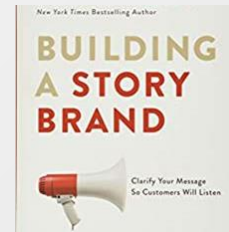
- **Collect data from recent wins**
 - What were the presenting issues?
 - What benefits have they realized?
 - What makes you different?

EPOCH
EPOCH
SALES MANAGEMENT SOLUTIONS



Align Sales and Marketing Messaging

Marketing Messaging Framework



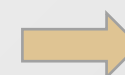
Unaware



Aware



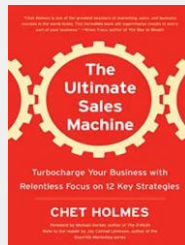
Interested



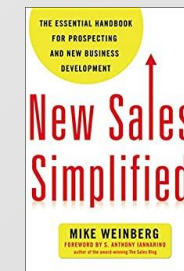
Evaluating



Taking Action



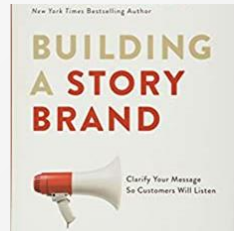
Sales Messaging Frameworks



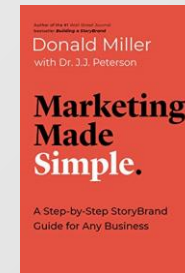
Golden Rule of Messaging: It's about them, It's not about you!!!

Align Sales and Marketing Messaging

Marketing Messaging Framework



Story Brand Framework



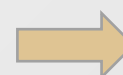
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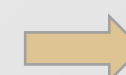
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Sales Messaging Frameworks

Golden Rule of Messaging: It's about them, It's not about you!!!

Align Sales and Marketing Messaging

Marketing Messaging Framework

Unaware



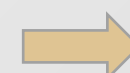
Aware



Interested



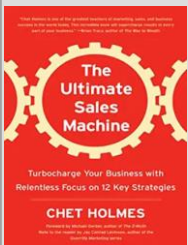
Evaluating



Taking Action

Stadium Pitch
Core Story
Concept

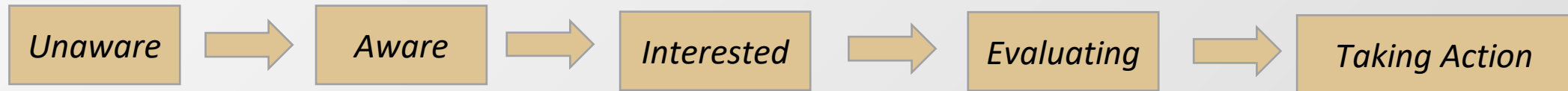
Sales Messaging Frameworks



Golden Rule of Messaging: It's about them, It's not about you!!!

Align Sales and Marketing Messaging

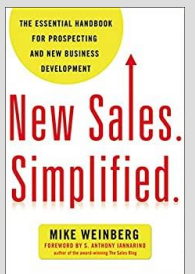
Marketing Messaging Framework



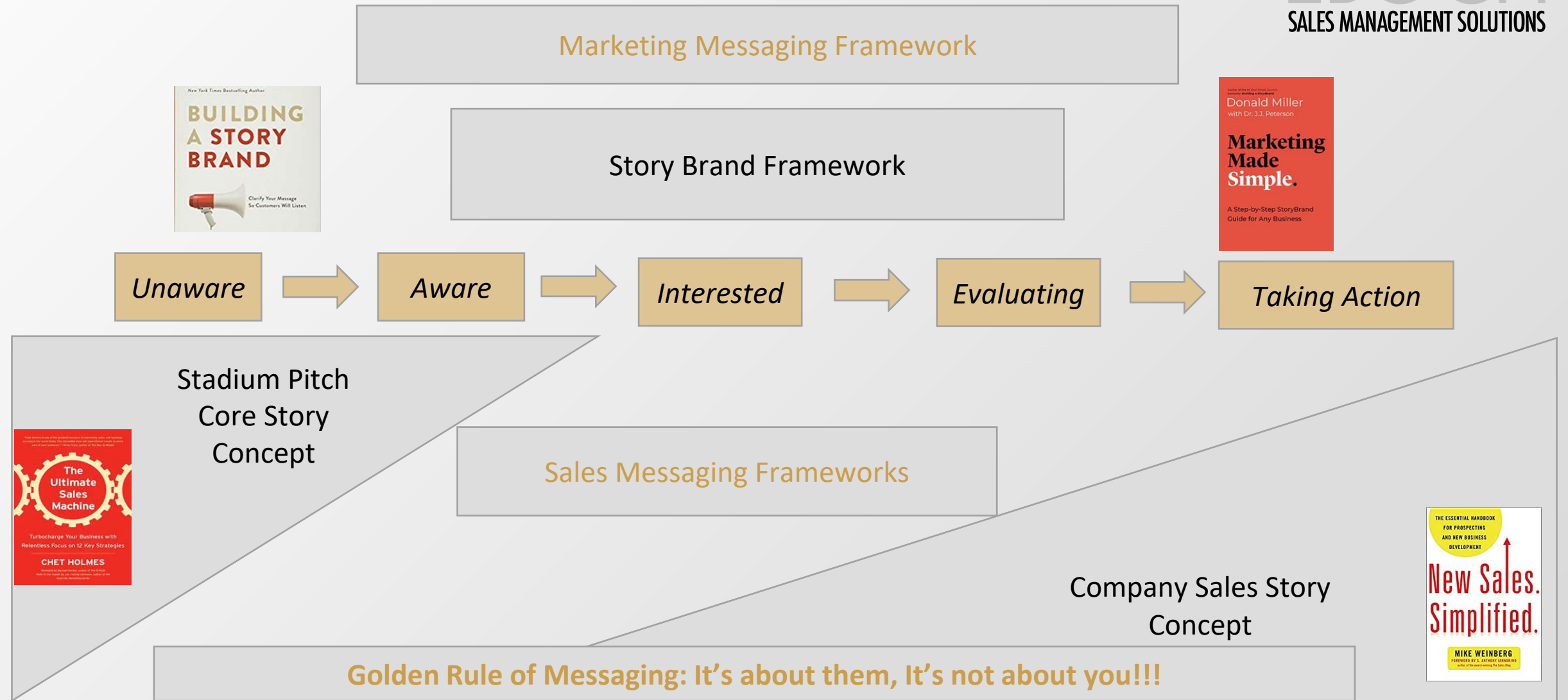
Sales Messaging Frameworks

Company Sales Story
Concept

Golden Rule of Messaging: It's about them, It's not about you!!!



Align Sales and Marketing Messaging



Own the Sales Messaging Right

- **Business owners: Own the process**
 - Make sure the message is right
 - Every Salesperson knows it cold
 - Spot check usage



Determine Sales Roles

	What	Where	Sales Role
Who	Closes New Business	at New Accounts	
		at Existing Accounts	
	Creates New Opportunities through sales outreach	at New Account	
	Creates New Opportunities from Inbound leads	at New Accounts	
	Created New Opportunities	At Existing Accounts	
	Builds clean target prospect lists		





Design a blueprint for success

Determine New Opportunity Process “Buckets” usage

- 5 New Opportunity Process Buckets
 - Existing Clients/Customer Success
 - Intentional Networking/Referrals
 - Multi-Touch, Multi-Channel Targeted Sales Outreach
 - Speak about Thought Leadership
 - Leverage INBOUND Marketing Engine
- Focus on 3-4 buckets
- Target no more than 50% of new opportunities from any bucket



Common Tasks

- Build Metrics
- Target Companies, Sell to People
 - Work Target lists
 - Use Sales Messaging
 - Email Templates
 - Phone call “openers”
 - Voice Mail Templates
 - Presentations
- Define Roles



“Failure to plan is planning to fail.”

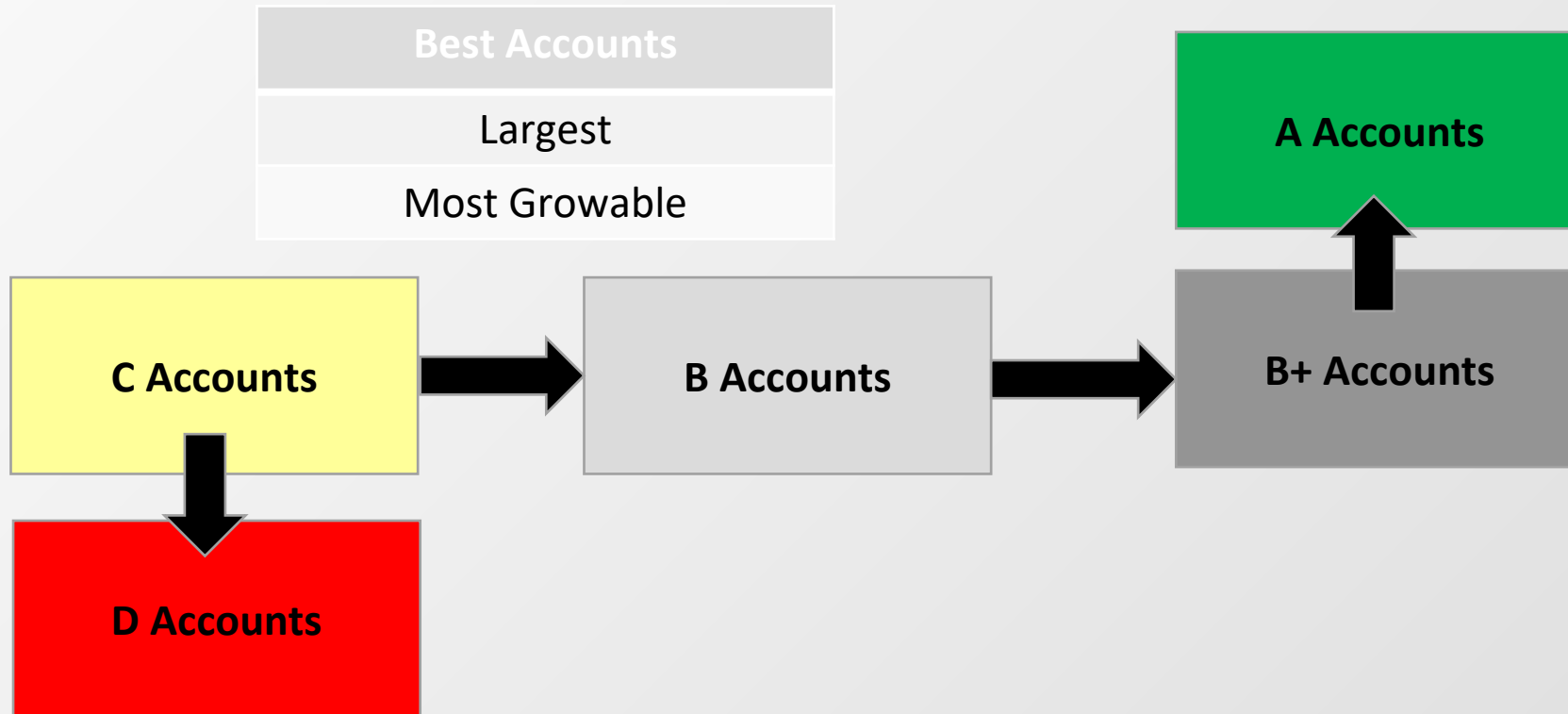
Customer Success/ Existing Clients

- Concepts
 - 80/20
 - Top 100
 - ABCD



Typically, 80% of the revenue comes from 20% of your clients

Growing Existing Clients



What are your upselling opportunities?

What are your cross-selling opportunities?

Did you ask for a referral?

OUTBOUND

- Intentional Networking
 - Networking
 - Quality over quantity
 - Lead, where possible
 - Prioritize your network contacts
 - Seek Introductions
 - Strategic Centers of Influence
 - Leverage 2nd Connections
- Referrals
 - Ask when clients are happiest
 - Gain permission
 - CAPS concept to provide focus
- Multi-touch, Multi-Channel
 - Channels used
 - Number of touches per channel
 - Duration/Frequency



Is there a need?

Speaking about Thought Leadership

- Formats such as:
 - Video Podcast
 - Webinars
 - Public Speaking
- Prospect for:
 - Participants
 - Attendees
- Provide Value



"Failure to plan is planning to fail."

INBOUND

- Build Inbound Marketing Engine Resources
 - Building a StoryBrand
 - Marketing Made Simple
 - HubSpot Guide
- Follow-up to INBOUND leads
- Looks a lot like OUTBOUND Multi-Touch, Multi-Channel Targeted Sales Outreach
 - First responders win most often
 - Need to qualify for fit



Is it a good fit?



Accelerate the Process

Optimize your Tech Stack

- CRM
- Lead Sources
- Contact Tools

Provide tools not toys



Coach and develop salespeople into sales hunters

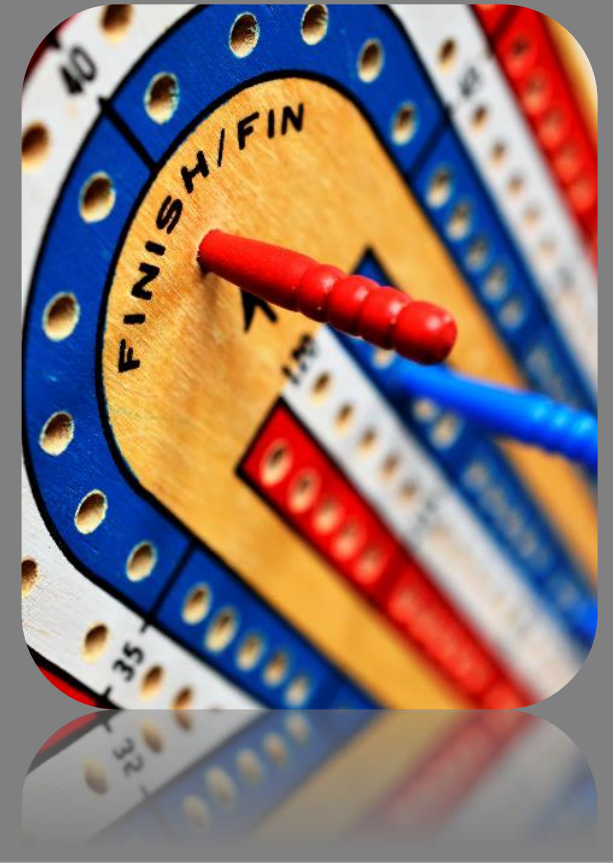
- **Enrollment**
 - Must want coaching
- **Seek to Understand**
 - Understand goals/Why
 - What is their Sales plan?
 - What obstacles do they see?
- **Co-create** new possibilities
 - Uncover the what and the how?
 - Uncover the why?
 - Uncover the who, how and when?



Are they role playing?

Success

Work these three stages to build a team of fanatical prospectors, armed with the processes and tools to provide continuous new opportunities and sustainable growth for your company.



BUT ... One more thing before you go

Want a guide to help you through the process?

- 3 Part Formula to a Healthy Sales Pipeline **Virtual Group** Program
 - Structured to help create more new opportunities in first month
 - Prioritized bucket toolkit development to optimize business growth
 - Guide each participant to complete Sales Toolkits/Playbooks for 3-5 “buckets” for their company
 - Provide instruction on 4 Foundational elements, 5 New Opportunity Process “buckets”, Optimizing Tech Stack and Coaching Sales Champions
 - **Special 50% off discount for Fall Program**
 - **Sale Price of \$1200 or 5 monthly payments of \$240**
 - Starts Monday, November 15th
- 3 Part Formula to a Healthy Sales Pipeline **Individual Company** Program
 - Contact us for more information

Content - 3 Part Formula to a Healthy Sales Pipeline Virtual Group Program



Session # (90 min each)	New Opportunity Process Buckets	Foundational Elements			Accelerate for Success	
(Held Every 2 weeks)	Bucket	Messaging Framework	Targeting	Culture/Mindset and People	Optimize Tech Stack	Coaching and Development
1	Existing Clients/ Customer Success	Company Sales Story	ICP#1			
2	Intentional Networking/ Referrals		Working Target Contacts		CRM	
3	Build and leverage Inbound Marketing Engine	StoryBrand			Lead Source Tools	
4	Multi-touch/ Multi-Channel Targeted Sales Outreach		ICP #2	Culture/ Mindset/ Metrics		
5	Speaking about Thought Leadership	Core Story		Determine Sales Roles		
6			Dream Accounts		Sales Contact Tools	Coaching
7	Priority 1 Bucket Toolkit Review Workshops					
8	Priority 2 Bucket Toolkit Review Workshops					

Schedule – 3 Part Formula to a Healthy Sales Pipeline Virtual Group Program

- **Starts Monday November 15, 2021 – 3:30 PM – 5:00 PM CT**
- Format includes 8 each 90-minute group sessions every two weeks and 4 each 60-minute one-on-one coaching sessions held every 4 weeks.
- Group Session Dates (3:30-5 PM CT on Zoom)
 - November 2021: 11/15, 11/29
 - December 2021: 12/13
 - January 2022: 1/3, 1/17, 1/31
 - February 2022: 2/14, 2/28
- One-on-one Coaching Periods (Scheduled by individuals on Zoom)
 - 11/16 – 12/13
 - 12/14 – 1/10
 - 1/11 – 2/7
 - 2/8 – 3/7



Contact us for more information

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