



CREATE AN AUTOMATED SALES PROCESS

How to Create an Automated Sales Process

Day 5: What's Next? How to Maintain Your Automated Sales Process to
Create New Opportunities and Close More Clients

Thank you!!!



Over \$2100 Dollars Raised!

With me today...



Steph Broecker

Missed Any Previous Sessions?

Replays at:

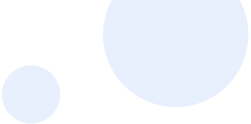
<https://connect365.io/casp-bootcamp-sessions>

Today's Workbook:

<https://connect365.io/casp-5>

Agenda:

1. *Creating your weekly action plan full of bite-sized action to keep your automated sales process rolling*
2. *Our 5 Step Discovery Call process to create more closeable opportunities*
3. *Looking ahead to optimize your process in the future*



The surefire way to
grow your business is to get in front of **more prospects**
and **book more appointments.**

That is the key to getting more clients, making a much greater impact, having more freedom, and making more money.



74%
Close Rate

The first viable vendor to reach a decision maker and set the buying vision have an **74% close ratio.**

- Forrester Research

You have a **56% greater chance** to attain quota (sales goals) if you engage a buyer before they contact a seller.

- Sales Benchmark Index



56%
Increase

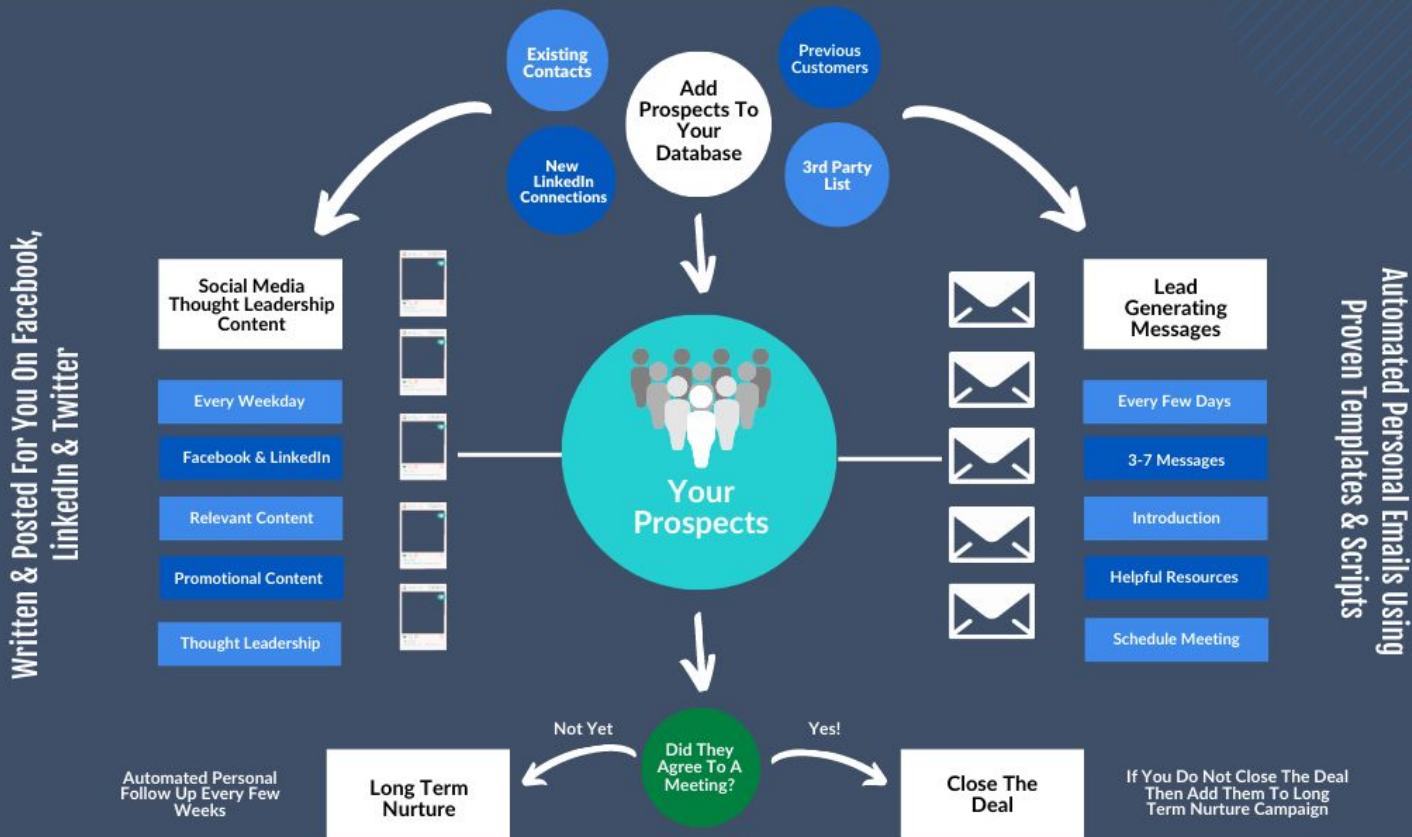
Key Takeaway #1

The most successful businesses are proactive with lead generation.

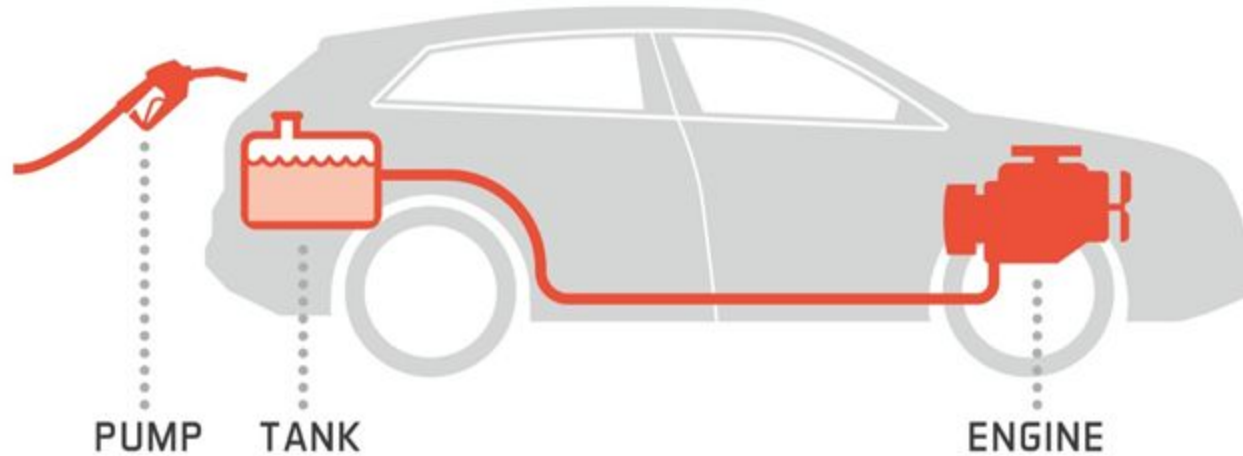
You can't rely on passive marketing, word of mouth, and referrals.

Key Takeaway #2

Trust should be at the center of everything you do.

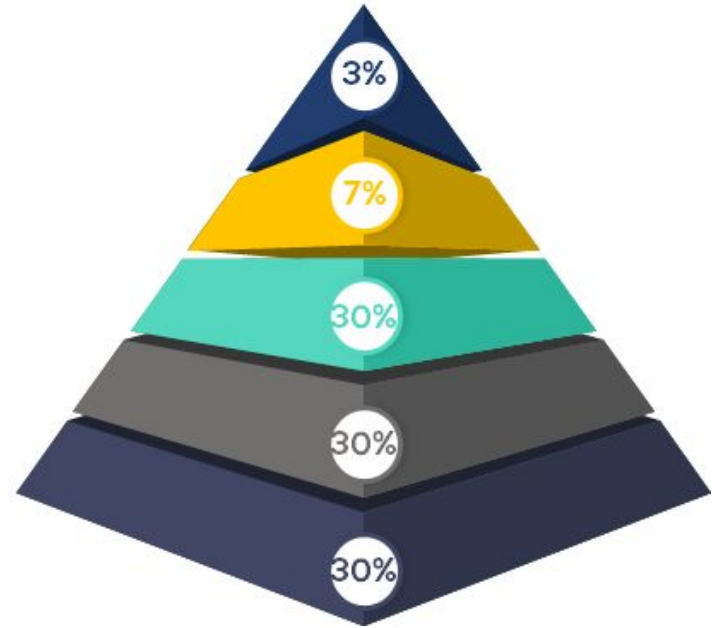


You've gotta put gas in the tank!



The 3% Fallacy

- Ready to purchase
- Open to buying, but not looking
- Not thinking about it (indifferent)
- Think they aren't interested
- Know they aren't interested



*This 70% section of your market
leads to more sustainable results.*

The Prospecting Treasure Map

A hand-drawn treasure map of an island. The map features a compass rose in the top right corner with 'N', 'S', 'E', and 'W' directions. A skull and crossbones is located on the right side of the island, with a dotted line leading to a treasure chest. The island is divided into several sections with different terrain: a forest of trees on the left, a mountain range in the center, a body of water in the middle, and another forest on the right. A small boat is visible in the bottom right corner of the map.

1. The Hidden Goldmine **

2. 3rd Party Databases

3. Social Prospecting

3rd Party Databases



Pro Tip:

With 3rd-party tools...go slow.

I recommend not adding more than 25-50 per day to a campaign.



“The system has allowed me to build a sequence of campaigns that educate like-minded people to take action.

I started with zero and I have about 20 new customers and 4 recommendations on partnering since beginning a few months ago.

The system has become a significant marketing arm of my organization, like a member of my staff.”

- Diane Wells, Supply Justice

6,017

Total results

216

Changed jobs in past 90 days

2

Mentioned in the news in past 30 days

678

Posted on LinkedIn in past 30 days

1,385

Share experience

4

Select all

 Save to list

 Tag




Linda Aldred 2nd

Senior Vice President and Chief Human Resources Officer at Texas Children's Hospital

14 years 10 months in role | 24 years 10 months in company
Houston, Texas Area

Past role

Vice President, Human Resources at Texas Children's Hospital (2002 - 2005)

Show more 



21 shared connections

Save

...

 Add tag



Catherine Shutts 2nd

Senior Vice President - Director of Human Resources (Corp) at Prosperity Bank

1 year 3 months in role and company
Houston, Texas Area

Past role

HR Director - Employee Relations, Benefits and Compensation at BakerRipley (2016 - 2018)

Show more 

Save

...

 Add tag

Keywords

Enter keywords ...

Filters

Clear (3)

Past Lead and Account Activity +

Geography +

Relationship +

Company +

Industry

Included:

Marketing and Advertising X

Company headcount

201-500 X

501-1000 X

+

Seniority level

+

10,374

Total results

958

Changed jobs in past 90 days

49

Mentioned in the news in past 30 days

2,933

Posted on LinkedIn in past 30 days

3,579

Share experience with you

Select all

Save to list

Tag



David Sendroff 2nd

Founder of Forensiq by Impact at Impact

3 years 10 months in role and company
New York, New York, United States

Past role

Founder & CEO at Forensiq (2010 - 2016)



51 shared connections

Save

...

Add tag



Walt Koval 2nd

Co-Founder / President at ClubCard, LLC

10 years 3 months in role and company
Philadelphia, Pennsylvania, United States



106 shared connections

Save

...

Add tag



Stefan Thomas 2nd

Founder at The Networking Retreat

Save

...

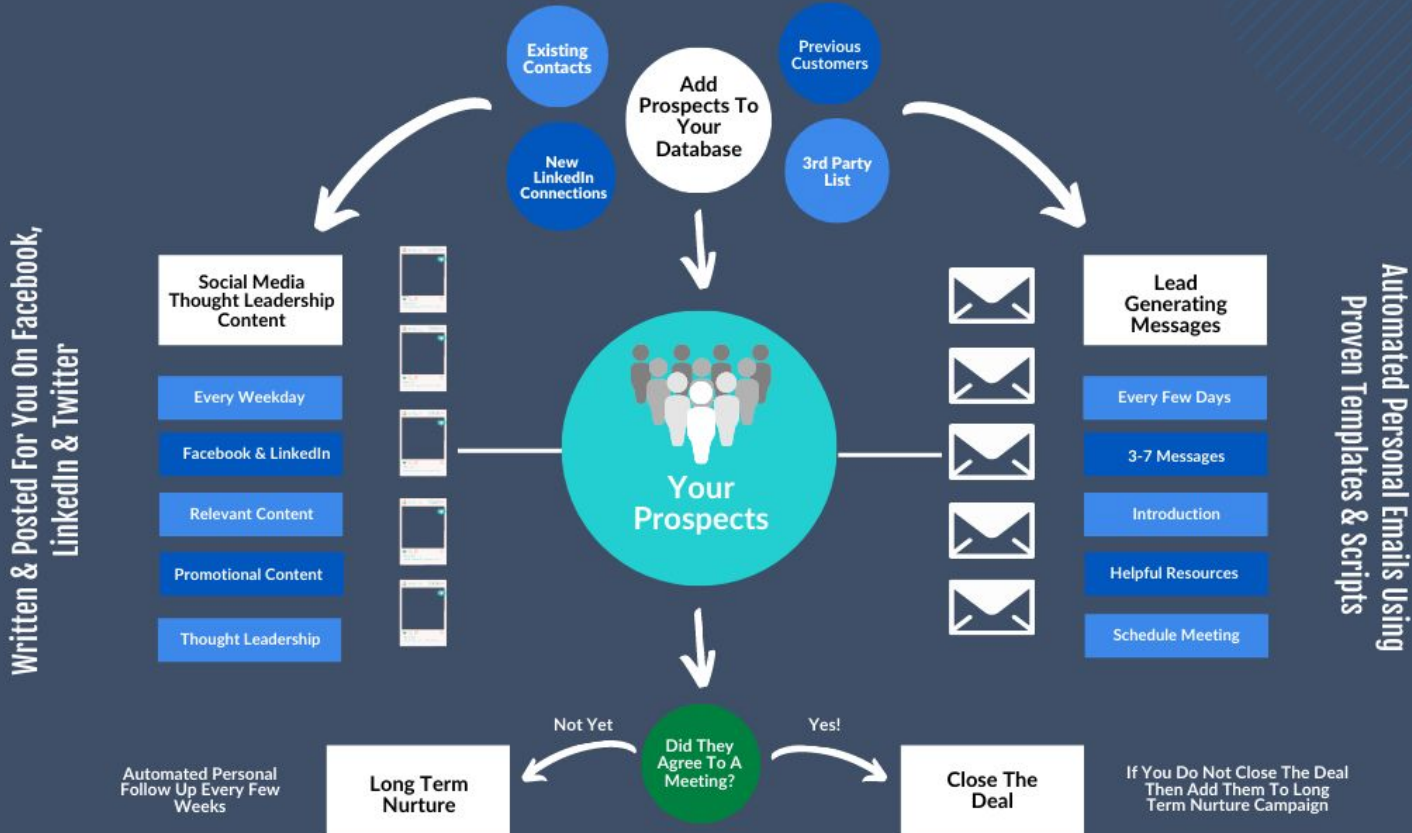


“My ***revenue doubled*** after working with Josh and the team. And ***it’s continued to double every year I’ve stuck with them.***”

I went from 100 clients to 212+ clients in just that first year. If you’re a small business and need clients, you’ve got to have a system like this in place.

- Mike Mertz, Mertz-International Limited

*What's so great about adding them
as a connection on LinkedIn?...*



Sample Weekly Agenda:

Mon: 10-20 min LinkedIn Connection Requests

Tues: LinkedIn requests

Wed: LinkedIn requests

Thurs: LinkedIn requests

Fri: Add Contact Details & Prepare to Upload

Sample Week 2:

Mon: Upload Contacts & Tag; LinkedIn requests

Tues: LinkedIn requests

Wed: LinkedIn requests

Thurs: LinkedIn requests

Fri: Add Contact Details & Prepare to Upload

*Review Emphatic posts

How should I handle the sales conversation?...

Key Concept - Discovery Calls:

A discovery call is an initial conversation with a prospect.

The goal is for them to qualify you (and you qualify them) for a deeper conversation.

**PROFESSIONAL
SELLING IS NOT
PRESENTING.**

KEY RULE



**LET'S COME UP WITH
A PLAN TOGETHER.**

Outline:

1. *Intro*
2. *Set the Agenda*
3. *Transition/30 Sec Commercial*
4. *Discovery/Uncovering Pain*
5. *Invitation to Next Step*

Want to dive deeper?



PAIN CAN BE TRICKY. A realization they haven't really thought about in this way before.



Qualification Standards:

Do they have the pain you solve?

Can they quantify the impact?

Are they committed to solving the pain?

THE PAIN FUNNEL



Goal:

Get them to a decision.

What's Next?...

Your free trial includes a total of 30 days access before your billing begins...Use that time to grow your process.

1. Keep prospecting.



Answering the phone, and taking an order from a person who is reaching out to you is not prospecting...it's called customer service.

What's Next?...

Your free trial includes a total of 30 days access before your billing begins...Use that time to grow your process.

- 1. Keep prospecting.*
- 2. Dig deeper with 'The Lead Generator' training.*
- 3. Stay in touch at -> support@connect365.io*

“I don't know if there's a 'secret sauce' to my campaigns. I think most people have failure to execute. They try once or twice for a magic bullet sales pitch in their email. My secret sauce is salt and pepper. That's all you need to make a steak taste great.

And for my campaigns, the salt and pepper is just sharing good, educational content (videos or blogs) with my ideal clients every 3-4 weeks.

Since starting with you guys 4 months ago, I've closed 2 clients and likely will have a 3rd soon. With the clients I typically work with [business owners of companies doing \$50 mil to \$1 bil annual revenue], 4-5 new clients in a full calendar year is a great year.

This has been like a godsend - the best money I've ever spent for my business.”

- John McAlister, The Beringer Group





TURNKEY LEAD GENERATOR

BY CONNECT 365

A Fully Done-with-You System to Build an Automated Lead Generation Campaign...Start-to-Finish!

What's included:

The Lead Generator System: (4 modules of Online Lead Generation and Sales training - videos, workbooks, scripts, templates) -

\$3000 value

Hand-Delivered Prospect List Every Month – 100-200 per month (\$1497 value)

Automated Posting to your Social Media Accounts (\$500 annual)

Done-for-You Custom Written Posts per month –30/month (\$3000)

Personal Email Campaigns Automated with Connect 365 (\$2,400 annually)

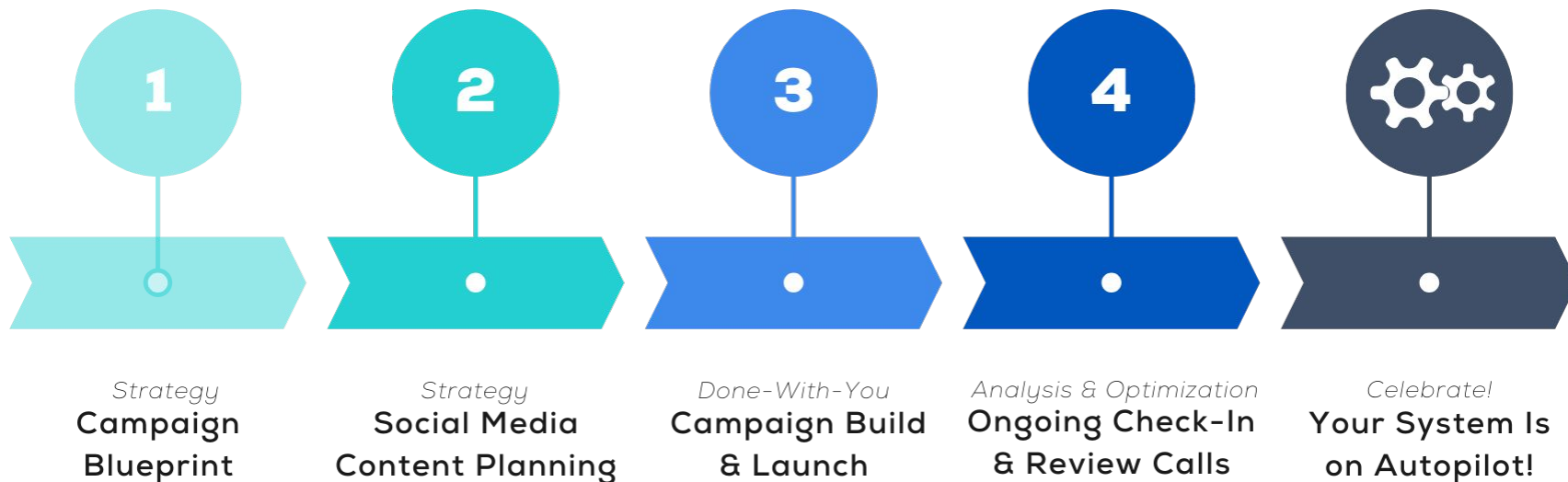
1-on-1 Campaign Coach – who will help you set up, manage and gameplan your entire system (\$5000 value)

Powered
by **CONNECT** 



BUILDING THE SYSTEM

Our 4-Step Coaching Process



So how can you get started?...



If all that sounds good to you, then I'm excited to personally invite you to join us in

The Lead Generator Turnkey!

...Open through the end of the bootcamp!

[Connect365.io/Turnkey](https://connect365.io/Turnkey)



TURNKEY LEAD GENERATOR

BY CONNECT 365

Finally, a proactive system to generate leads
AND clients on autopilot!

What's included:

The Lead Generator System: (4 modules of Online Lead Generation and Sales training - videos, workbooks, scripts, templates) - \$3000 value

Hand-Delivered Prospect List Every Month – 100-200 per month (\$1497 value)

Automated Posting to your Social Media Accounts (\$500 annual)

Done-for-You Custom Written Posts per month –30/month (\$3000 value)

Personal Email Campaigns Automated with Connect 365 (\$2,400 annually)

1-on-1 Campaign Coach - who will help you set up, manage and gameplan your entire system (\$5000 value)

Fast-Movers: Outbound **Sales Mastery Mastermind** (Value: \$5,000)

TOTAL VALUE:

\$20,397+

Powered
by **CONNECT** 

\$997

**for 3-Months
Access!**

Get Started Today At:

Connect365.io/Turnkey

Get Started at...

Connect365.io/Turnkey

Then just:

**Just \$166 a month after
that!!!**

To keep your email campaigns and social media content going.

Questions???