6 Building Blocks to Strengthen Your Grip on Growth

“Grow or Die”
PHENOMENON FOLLOWING PEAKS
THE CASE FOR GROWTH

➢ Financial Factors #1 Driver of Valuation

➢ Future Income Most Valuable Business Asset

➢ RISKS – Dependency of Owners

➢ Next Generation of Owners

➢ VALUATION Improves with Proven Processes
BUSINESS HAVE 3 MAJOR FUNCTIONS

Integrator

S/M  OPS  FIN
6 BUILDING BLOCKS

DEVELOPMENT

ACTION

ACCOUNTABILITY

CLARITY

STRUCTURE

METHODOLOGY
DEVELOPMENT

ACTION

ACCOUNTABILITY

CLARITY

STRUCTURE

METHODOLOGY

MOST 20%

0%
Roles
Data
HARRIS POLL (23,000 RESPONDENTS)

➢ 37% Know Organization’s Goal

➢ 20% Tie Their Task to Goal

➢ 20% Enthusiastic About Goal

➢ 10% Felt Accountability to Goal
RIGHT PEOPLE RIGHT SEATS

Roles

1. XXXX
2. XXXX
3. XXXX
4. XXXX
5. XXXX
MINE THE HISTORICAL DATA

➢ Close Rate: $\frac{\text{# of Jobs Won}}{\text{# of Jobs Bid}}$

➢ Average Job Size: $\frac{\text{Total Dollars Won}}{\text{Total # of Jobs}}$

➢ Conversion Rate: $\frac{\text{# of Jobs Bid}}{\text{# of Sales Calls Made}}$

➢ Touch Rate: $\frac{\text{# of Sales Meetings Made}}{\text{# of Requests to Meet}}$
MINE THE HISTORICAL DATA

- Close Rate: \( \frac{\text{# of Jobs Won}}{\text{# of Jobs Bid}} = 30\% \)

- Average Job Size: \( \frac{\text{Total Dollars Won}}{\text{Total # of Jobs}} = \$50,000 \)

- Conversion Rate: \( \frac{\text{# of Jobs Bid}}{\text{# of Sales Calls Made}} = 33\% \)

- Touch Rate: \( \frac{\text{# of Sales Meetings Made}}{\text{# of Requests to Meet}} = 3 \)
Sales Quota = $1,000,000
Close Rate = 30%
Pipeline Needed = $3,333,333
Average Job Size = $50,000
# of Opportunities Needed = $3,333,333 ÷ $50,000 = 67
# of Leads Needed = 67 ÷ 33% (Conversion Rate) = 203
# of Touches Required = 203 X 3 (Touch Rate) = 609
Weekly Touches Needed = 609 ÷ 50 = 12
LEVERS TO PULL

1) Leverage Close Rate = 30%

2) Average Job Size = $50,000

3) Leverage Conversion Rate = 33%

4) Weekly Touches Needed = \( \frac{609}{50} = 12 \)
6 BUILDING BLOCKS

DEVELOPMENT

ACTION

ACCOUNTABILITY

CLARITY

STRUCTURE

METHODOLOGY
Customer Analyzer Calendar
# CUSTOMER ANALYZER

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<tr>
<th>A</th>
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<th>D</th>
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## THE IDEAL CUSTOMER PROFILE

<table>
<thead>
<tr>
<th>Name</th>
<th>Value the relationship</th>
<th>Our niche</th>
<th>Profitability</th>
<th>Easy to do business with</th>
<th>Best in Class</th>
<th>Share of Wallet</th>
<th>Little/no energy</th>
<th>Target</th>
<th>Cease &amp; Desist</th>
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## CUSTOMER SEGMENTS

- Value the relationship
- Our niche
- Profitability
- Easy to do business with
- Best in Class
- Share of Wallet
- Little/no energy
- Target
- Cease & Desist
WHAT WE FOUND LEAD INDICATORS

High-Value Activities

Low-Value Activities

Customer Interfacing

Not Customer Interfacing
UNDERSTANDING EACH QUADRANT

- High-Value Activities
  - Q1
  - Customer Interfacing
- Low-Value Activities
  - Q3
  - Not Customer Interfacing

- Q2
- Q4
# TYPES OF ACTIVITIES PER QUADRANT

<table>
<thead>
<tr>
<th>High-Value Activities</th>
<th>Q1</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Prospecting</td>
<td>1) Planning / Preparation</td>
</tr>
<tr>
<td>2) Establish Relationship</td>
<td>2) Research / Rehearse</td>
</tr>
<tr>
<td>3) Need Discovery</td>
<td>3) Creating email / scripts</td>
</tr>
<tr>
<td>4) Presenting Solutions</td>
<td>4) Design Sales Collateral</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Low-Value Activities</th>
<th>Q2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Donut Drop</td>
<td>1) Wind-Shield Time</td>
</tr>
<tr>
<td>2) Wrong Conversations</td>
<td>2) Administrative Work</td>
</tr>
<tr>
<td>3) Meeting Wrong People</td>
<td>3) Internal Meetings</td>
</tr>
<tr>
<td>4) Customer / Tech Service</td>
<td>4) Checking Email</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer Interfacing</th>
<th>Not Customer Interfacing</th>
</tr>
</thead>
</table>
SELF-REPORTING SURVEY SAYS . . .

<table>
<thead>
<tr>
<th></th>
<th>High-Value Activities</th>
<th>Low-Value Activities</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Q1</td>
<td>Q2</td>
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<tr>
<td>10%</td>
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<td>20%</td>
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<tr>
<td>30%</td>
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<td>40%</td>
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</tbody>
</table>

Customer Interfacing | Not Customer Interfacing

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CALENDAR BREAKDOWN

- Prospect Meeting: 2 hours
- Conversation Prep & Follow Up: 4 hours
- Sending Out Prospect Messaging: 3 hours
- Follow Up & Nurture: 4 hours
- Bounce Meeting: 2 hours
- Tracking & Administrative: 2 hours
### CALENDAR

<table>
<thead>
<tr>
<th>TIME</th>
<th>SUN</th>
<th>MON</th>
<th>TUE</th>
<th>WED</th>
<th>THU</th>
<th>FRI</th>
<th>SAT</th>
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<tbody>
<tr>
<td>8:00 AM</td>
<td></td>
<td>sending out prospect messaging</td>
<td>Bounce Meeting</td>
<td>follow up &amp; nurture</td>
<td>conversation prep &amp; follow-up</td>
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<tr>
<td>9:00 AM</td>
<td></td>
<td></td>
<td>Prospect Meeting</td>
<td>follow up &amp; nurture</td>
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<td>10:00 AM</td>
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<td>12:00 PM</td>
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<tr>
<td>1:00 PM</td>
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<td>Rehearsing Discovery Questions</td>
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<td>2:00 PM</td>
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6 BUILDING BLOCKS

DEVELOPMENT

ACTION

ACCOUNTABILITY

CLARITY

STRUCTURE

METHODOLOGY
METHODOLOGY

Process
Props
CREATING A **COMPETITIVE ADVANTAGE**

PRICE  
SERVICE

UNATTAINABLE TRIANGLE

PRODUCT
BUYERS VALUE

➢ Salesperson Competency 39%
➢ Total Solution 22%
➢ Product Quality 21%
➢ Lowest Price 18%
New Customer

Prospecting

Cloud

Top Trust

Middle Urgency

Bottom Preference

Leads

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THEY AGREE TO MEET WHEN . . .

1) They want to expand their product offering or entertain new bidders
2) When their current supplier (your competition) is having problems
3) When they are performing a product / supplier / contractor review
4) When they are having problems
5) When they want different ideas about how to solve their problems
6) You reach out with relevant information to their challenges/priorities
ACCESS TO THE RIGHT PEOPLE

80%

That’s the percentage of decision-makers that say they would take a meeting with an outside supplier when it’s relevant to their priorities.
4 **VALID BUSINESS REASONS TO MEET YOU PROBABLY DON’T KNOW ABOUT**

1) Strategic Introduction  

2) Capabilities Briefing  

3) Bounce Meeting  

4) Executive Roundtable
1) STRATEGIC INTRODUCTIONS

➢ Transfer of Credibility

➢ Cold-Calls = .05% - 5.0%

➢ Personalization = 10% - 15%

➢ Direct Introductions = 15% - 20%
2) CAPABILITIES BRIEFING

1) Not pushy, just to let you know what we do before you need it.

2) Avoids objections, because not trying to sell them anything.

3) Not trying to sell, trying to start a conversation.

4) Frames the conversation to be had.

5) Positions you as Hip-Pocket Resource
3) BOUNCE MEETINGS
4) EXECUTIVE ROUNDTABLE
EXECUTIVE ROUND TABLE

1) High-caliber executives (invitation only)

2) Virtual Meeting (Zoom, GoToMeeting, Skype)

3) Who else is going to attend (Your Anchor)

4) Topics that are of the most interest to attendees (we ask them)

5) Limited to 8-12 Attendees

6) Your role is to facilitate (connection economy)
6 BUILDING BLOCKS

DEVELOPMENT
- Obstacles
- Coaching

ACTION
- SAP Sales Action Plan
- Sales Planner

ACCOUNTABILITY
- Rocks
- Cadence

CLARITY
- Roles
- Data

STRUCTURE
- Customer Analyzer
- Calendar

METHODOLOGY
- Process
- Props
Jim’s Cell 770-331-0277
The Coaching Journey

**Kick-Off**
- 6 Building Blocks
- 360 Survey
- Scorecard
- Journey Assessment

**Foundation Stage**
- Sales Planner
- Customer Analyzer
- Sales Process
- Custom Props

**Launch Stage**
- SAP
- Calendar
- Rocks
- Cadence

**Mastery Stage**
- Accountability
  - SAP
  - Rocks
  - Obstacles
  - Anticipate
  - Mindset
  - Coaching

**Frequency**
- Every 2 Weeks
- 2-3 Weeks
- 2-3 Weeks
- Every 4 Weeks

**Duration**
- ~1 Month
- 1-2 Months
- 1-2 Months
- Ongoing