PROSPECTING SCRIPT WORKSHEET

1. Select a target market
2. Create a list of companies in that target
3. Look on LinkedIn to see how you are connected to them
    a. Direct connections – if you find someone you're directly connected to then email him or her about having a short meeting so you can learn more about what's going on with them.
    b. Someone in common – when you find someone who is a 2nd connection take a look at who you have in common.

If it's someone you know well, reach out to YYOUR connection and say, "I see you're connected to Joe Smith. Would you feel comfortable introducing me to him? I'd like to learn more about his business. I might have a program that could be valuable for him. It might not be. Learning about his business will give me some insights into where he is."

Or simply

"I see you're connected to Joe Smith. Would you feel comfortable introducing me to him? I'd like to learn more about his business."

When they say, "yes", say, "that's great. Could you do an email introduction? That way you'll have each other's contact information."

When you receive the email intro, you reply all and say, "thanks (contact name). Hello (prospect). So nice to meet you. Would you be available for coffee or a quick call? I'd like to learn about you and your business."

a. In groups with them – these people are now 2nd connections. You can ask to connect directly with them through LinkedIn. To do this, go to their profile and click the connect button. When the box pops up choose the group option. In the box where you can put a message say, "Hello (contact name). We share (fill in the name of the group) group. I'd like to connect with you and learn more about your business. Sincerely, (your name)."

Once they accept your connection, you can grab their email address from their LinkedIn profile (in the contact info section). Send them an email that says, "Thank you for accepting my LinkedIn connection request. I'm wondering if we could schedule a short phone call or grab coffee so I can learn more about your business."

Take it from there. You're not meeting with them to sell them on your product/service. You're meeting with them to learn about their business FIRST. Then, if what they tell you coincides with what you offer, you can ask some questions to see if there's an opportunity there.

(Or you can ask about a specific day and time. For example, "how does Tuesday at 3 look for you?")

For those companies where you have no connection, you will have to do some form of cold calling. Sending an introductory letter with your brochure is a great first step.

1. Send a letter with a brochure and business card in an envelope with a handwritten address and real stamp, not something from the postage meter. Go to the post office and buy some stamps.

2. Put an appointment on your calendar to do the follow up call. Call to follow up 3-5 business days after you send the letter.

If you get them on the phone you can say:

"Hi {prospect}. This is (you) at (your company). I'm calling to follow up on the information I sent you a couple of days ago. Have you had a chance to take a look at it?

Is it something you'd be interested in exploring? I promise I'm not going to sell you anything! I'd simply love to learn more about your company. If we have a program that could help you, I'd be happy to tell you about it then. If not, I'll tell you that as well. How's next Tuesday at 3?"

If you get voicemail –

"Hi {prospect}. I'm sorry I missed you. This is (you) at (your company). I'm following up on some information I sent you a couple of days ago regarding (your solution).

I'd love to learn about the kinds of programs you have implemented at {name of company}. I'm not trying to sell you anything. I'm merely interested in learning about your company and (issues you resolve). There's the possibility that our program might be a good addition. Or not. Either way, I always find value in meeting other business leaders in the community. I'll send you an email with the same information from this voice mail, in case that's your preferred communication method.

Please feel free to reach out at xxx-xxx-xxxx if you'd like. I'll follow up with a call in a couple of days to try to connect.

(Be sure to send that email detailing the same information.)

If they don't reach out to you, call them in 3-5 business days to follow up. You don't have to leave a voicemail the second time. But do put a note in your records that you tried. Try again in 3-5 business days. You get to decide how many times you are going to try to connect with them by phone and/or email. When you reach the point where you think they aren't interested, you can either stop the outreach, or you can call one more time and let them know you are going to stop calling for now. You can say something like you are starting to feel like a pest and don't want to feel that way, so you're going to put a note in your calendar to check in a couple months from now. In the meantime, if they determine they'd like to talk, they can reach you at xxx-xxx-xxxx.

You can also say something like – "I get it if (your offering) is not something that is at the top of your priority list at this time. Please know you won't offend me if you tell me you don't want to meet. I appreciate that this isn't for every company. I certainly don't want to be pestering you, but I also don't want to assume to know your level of interest. I'll try you again in a couple of days unless I hear otherwise."

What to do in the meeting

Once you've secured a meeting date and time you want, be sure to be ready for it. Refresh yourself on any research you've done on the company. If you haven't done any, schedule time to research them online. The more you know about them the more you'll have to talk with them about.

You'll also want to have a list of questions to ask them in the meeting. Resource E is a start. You can download the list and add to it with the questions that are specific to the product or service you offer. Just make sure the list is as comprehensive as possible. You're on a discovery mission.

Once you have the answers to your questions, you'll know whether you can provide them with a proposal. Thank them for the information and offer to create a proposal.

"Thank you so much for taking time with me today and sharing so much information. Based on what you've shared, I think you might be able to provide you with a program that can result in improved {____________________}. Can we schedule a follow up meeting when I can bring in the proposal and we can go over it?"

If you find from their answers that either you can't provide them with a proposal, or, they are not a company you want to work with, respond like this: "Thank you so much for taking time with me today and sharing so much information. I truly appreciate you allowing me to learn about your business. I don't want to take any more of your time. Based on what I've learned, I don't believe we are the best resource for you. Thank you. Have a good day."

If you're going to provide a proposal, go back to the office and create it. The beginning should be a recap of what you heard from them. The second section is the solution you're proposing. The last section is the details – their investment, amount of time, location, etc. When you take the proposal to the prospect, start by reviewing what you heard them say. "What I heard you say is this ... "

“Based on that information we propose to . . . . . . “

“How does that look?”

Remember, you can offer a pilot program so they can get an idea of what you can do for them before they sign on for a long program at a larger investment.

If you’re not going to provide a proposal, then send them a handwritten note thanking them for their time.