**Introduction and Setup**

We are going to be working in this session. If you paid attention and did the homework, you should have reviewed July's session on closing the sale presentation.

I asked you to watch that. You should have brought a pitch deck to work on your quote, your proposal, whatever it is that you use, your documents that you use in the closing the sale presentation. I would encourage you, if you haven't watched those things, you should have downloaded my deck that I'm sharing with you because there's going to be examples in there and I can't keep the slide going back and forth. If you downloaded this deck, you can open it up and you can look at some of the examples there. Obviously, you should have your laptop that you're working off of.

Let me also just say, I want to give a special thanks because I get a lot of the credit for what goes on around here, but really, everything that we have developed from day one, 22 years ago, when I started TMT officially, has always been a collaborative effort with my members. I don't sit in a room and come up with stuff and put it out there. I work with all of you in different groups in different ways to develop the content.

I want to just give Roland Parker, Lisa Neacamp, Stephen Taylor, Todd Clark, and Adam Spencer some credit because they have worked with me over this last quarter in developing this pitch deck. Just know that this wasn't just me dreaming this up. I'm going to use their examples throughout and I would tell all of them wherever they're sitting in the room that please, if you guys want to comment, come up to a mic. If you guys have a question, this is a working session.

So I really do appreciate that. Ray Green is also somewhere in the room and he's over there. Okay, so Ray is going to be, when we're in the working session, he will be walking around to help you.

So again, this is going to be a working session, say engaged, don't check out, respond to emails, or get on, do some clear some tickets, or get on social media. It's weird that I even have to say that, but you have your laptops, you have your phones in front of you and it's very easy to go into distraction mode. So stay connected with the people at your group. Hold each other, the whole term of accountability group is so that you hold each other accountable to being your best self.

You know, last night I was, came home from the BFCC presentation club that we were working and I go and I was working out and I come out and Emily is on her phone and I looked at her, Emily is my 10-year-old and I said, Emily, did you do any exercise today and she kind of looked at me and she goes, well, I guess I ran around at recess. I said, okay, all right, it's better than nothing. I said, have you read a book outside of school? And she's like, no, and I said, you have any homework you need to do? And she says, no, no, I got that done. And I could tell she was getting irritated with me.

I also wondered and asked her what happened to the bag of Reese's peanut butter cups that was sitting there on the counter. See, they're really clever. They think if they leave one in the bag, mom won't notice, right? You know, that all the rest are gone. And she's getting irritated with me. I said, look, darling, I love you so much. I am not going to let you be less than you can be. And we take that stance with our children because we love them and we want them to be better than we are. And so when we talk about accountability, that's what you guys got to have to do to each other and you have to be allowed to be held accountable as well.

So make sure you stay engaged, work together, don't check emails, don't look at tickets, don't surf the web, okay? Don't get up and wander around because that's the other thing. When we go on to break, I'll see people getting up to go get coffee or go to the bathroom or have a chat with somebody or whatever it is. You know, again, stay in the work. Stay in the work. If your group sucks by another group, all right? So if I see you up wandering around, it should be with laptop and hand to try and find a more productive group. And that's okay, you know? That all allow. And if you're by yourself, get in a group of people to join, okay?

So that you can get the most out of this because I think, you know, people feel bad. They come to me and they say, you know, I feel bad asking your questions because I feel like I know what the answer is going to be and I don't want to bother you and all that. And they're not bothering me. It's sometimes you just have to talk something out loud with another person to process it yourself. That's really what consultations are. It's like, I got this issue. I've got this problem. I've got this idea. Maybe it's a good idea and I need to flesh it out. Talking with other people helps you to mentally process that through.

So in your groups, make sure you're, you know, you're working together and getting the most out of that.

**The Sales Process**

As a reminder, this is where we are in the sales process. As you guys know, there should be a qualification process. So the lead comes in. However it comes in by email, by phone. So I'm walking up to you at a trade show or networking event or however it comes in. There's a little process of qualification to make sure that this is somebody that that you want as a client and has potential to be a right fit client, a high value client for you.

Then there is full discovery and the full discovery is an hour long plus meeting where you're really digging into the problems, the pain, the goals, the situation, the budgets, the whatever it is, right. You're assessing their environment, you know, from the standpoint of like the owner CEO standpoint.

Then you're doing your technical assessment just like if you go to a doctor, the doctor asks you questions but then doesn't x-ray or does blood work or doesn't MRI. So the technical assessment is to get, to gather more information.

Then you're coming back to the prospect or even the client and you are saying, here's the problem. We've assessed the problem and here's the recommendation. We're prescribing a recommendation and we're closing that deal and then number five follow up only happens.

Well follow up happens either way either following up because they're a customer and you're onboarding them or you're following up to close the deal per whatever it loosens or things that need to be done, right.

So when we last time we got together I went through this seven component part of closing this part of the sales process, the closed the pitch, the prescribed the closed meeting and we talked about all seven of these things. I'm not going to go over number one because that's really not part of the pitch deck. That's just more part of preparation for the meeting. But the agenda, the pain train, the why us, the sell the solution, the money talk and the ask for the order.

**Creating Your Pitch Deck**

What I would suggest for all of you is to have at least one slide as a visual prompt. Okay so we are putting to we're going to use a slide deck. Now if you don't like slide decks you can use a PDF. It's up to you guys. It doesn't matter to me. I'm just saying that what I have found is if you give some sort of a flow like the bones of a presentation in a slide, either a slide deck or in a PDF report, it's a visual prompt for talking points for you.

But then when you hire sales people to work for you, this is the framework you're going to teach him and you want to give him this framework and you want to give him the visual prompts so that they remember, oh on this slide, I tell this story. Oh on this slide, I go over money and this is how we have the money talk, right?

So there's just understand like there's the magic, if you wasn't really magic in a PowerPoint, the magic is in your tonality and your certainty and the stories that you tell and how you overcome objections and how you listen and how you stay and report. All of that is still super critical to closing the sale and way more important than a slide deck. Like so I just want you to know I'm not suggesting that if you have a great kick ass slide deck you're going to close every deal.

What the slide deck is just to give you a framework or the bones of a presentation so that you can stay organized and not get lost in the process when you're trying to close the sale. Does everyone understand you still have to overcome objections, you still have to have great tonalities, you still have to great certainty, you have to stay and report, you have to do all those things. Does everyone understand that, right? But this slide deck will help you prompt now.

Another thing to keep in mind as you're putting together your slide deck because I've looked at since the last time we got together, I've looked at a lot of people's presentations and here's the rule. Everything you say or do should build certainly in the prospect to buy if it doesn't take it out. So I look at a lot of slide decks or sometimes they're not a slide deck, they're in a PDF or whatever it is you're giving the client and there's a bunch of information in there.

And I love audit, don't get me wrong, I love the audit process, I love that presentation tool but you don't need to have 20 pages about what fishing is and what malware is and what cloud is and because a lot of that stuff gets then what you're doing is you're watering down your presentation because there's so much information.

So if it does not build certainty, if it doesn't overcome an objection, if it doesn't build trust, take it out. Like sometimes you're just throwing a bunch of shit up there because you don't know what else to do. If it does ask yourself, does this talk track, does this graph, does this thing, whatever it is that you're doing, does this build certainty so that the prospect goes high on a 10 scale and says I'm very certain about the solution you're selling, the price in terms, you as a company and you as an individual. I'm very certain that you're the right company, you're the right person, you're the right solution at the right price at the right time and yes, I'm going to buy because that's what we're trying to do.

We're trying to build certainty because in a sale, when you're at this part in the sales process, guys, okay? So if you've done your qualification and you've done great discovery and you've done your technical assessment and you're coming back to pitch the deal, there's only three things that could happen, right?

So one thing is the prospect could see your presentation, you ask for the order and they say yeah, looks great, let's do it. You get a total lay down sale and probably about maybe 5-10% of sales are just that. Someone who's just absolutely yes, we want it, we need it, we love it, let's go, all right?

The other thing that could happen is they say no, this is absolute, I'm not buying, this is a hard no, that's actually even more rare because at this point, they've gone through all this, they're not going to just turn around and say absolutely not unless you really hosed it up somewhere in the process.

What you're most likely to get is what? Let me think, maybe, maybe, I'll buy, maybe I won't, let me talk to someone, let me look at this, let me talk to my attorney, my spouse, my business partner, the Easter bunny, whoever it is that they need to go over this thing, right?

So what we're trying to do in everything we're doing is stay in, when I say stay in rapport, I don't mean that they're like, you know, like you're talking about sports and you got kids, that's fake rapport. Report, as you can tell, have you ever been talking to someone and trying to sell them something and you can sense they're not agreeing with what you're saying?

Have you ever been talking to someone and you can sense they're getting distracted, they're getting disgruntled, they're right, you get that sense, see now you're out of rapport. And so the goal is all along the way you're checking in, you're, are, am I in rapport? Are they, are they agreeing? Are we in agreement with what we're discussing? Are we in agreement about terms and price? Are we in agreement about what the problem is? Are we in agreement about how we should move forward?

And so you're doing that through the whole sales process and that's like emotional intelligence that takes a little bit of time to learn and it also I think even more it takes a little bit of time to know how to respond when someone hits you with something that kind of throws you sideways.

So just the rule is when you're building this ask yourself does this story, this image, this talk track, this piece of information, does it build certainty or does it remove it? That's the question you want to add, that's the rule, all right? Because the purpose of the slide deck is not to close the sale but to give you a visual prompts to stay on track.

So if you, like for example, if you're in a closing meeting and you've got, let's say you've got a, you've got one slide that's about fishing and one slide that's about malware and one slide that's about, I don't know, whatever else that you've got in there right cloud and what it is and you know, if you find yourself going, well, oh, slip through those real quick, oh, that's just some information like then don't put it in there. There's no point in having, if you're just going to skip over it, then don't put it in there. Does that make sense? Like don't put anything in there that isn't moving the sale forward, all right?

**Cover Slide and Agenda**

Okay. So what we're going to work on first and this should only take two slides is we are going to have your cover slide, which is the cover of the document, the PDF or the first slide in the presentation and the agenda. And if you remember what I said, the last time we got together, you want to set the agenda in advance. And the reason you do that is because number one, it shows that you are in control of the sale. One of the first things, one of the things you have to do if you're going to be successful at selling is you have to take control of the conversation.

Now, asking questions is taking control. If they're starting to hammer you with questions, they're in control. So you've got to, and it's not to say that they can't ask questions. I'm not saying that. I'm just saying that like you have to stay in control. So by presenting in an agenda, you're saying here's how this meeting is going to go because this is the agenda and you get agreement on that.

Then the other reason you have it on there is because in the agenda, it should always say at the end, if appropriate, we're going to sign the paperwork and move forward. That should always be the last item on your agenda. Does everyone understand? So I'm setting the expectation that if appropriate and you like and everything is appropriate, we're going to sign the steal and move ahead. And again, looking at some of you putting this together, I haven't seen that.

So, this is Lisa, Lisa knee camps. This is her. I'm not going to show. By the way, I've taken some of their their slide. Like I said, Lisa Roland, Steven, they've all worked with me to create this. So I'm going to show some parts of their slide. So that's an example of a cover slide and here's an example of agenda, review the problems, reveal the reveal our report of finding, show you what we discovered, recommend a plan to solve your problems and secure your network, discuss our services in the budget, work through any questions or concerns and if appropriate, okay, the paperwork. You can cut and paste that folks, all right? Don't feel like you got to be super creative, but you got to have it in your presentation, all right?

This is Todd Clarks and prepared for company. Here's his agenda, review the problems, the challenges, challenges, same thing. If appropriate, okay, the paperwork and selected onboarding date and Todd, yes, I did add that because you had it off. So if just so the people in the room are like, wait a minute, that doesn't look like mine, that's right, because I have to fix it, okay? So because you left that part off, all right?

And Stephen's actions, security and action plan, notice we didn't call it a proposal, all right? Don't call it a proposal that sails language, right? Agenda, now this is a little bit and then he has get started, so that's just the way he wrote it, right? Cybersecurity, critical issues, why us?

So I've given you some of those examples, Austin is going to put 10 minutes on the clock and I want you to work in your groups, pull your slide decks up and I want to make sure you have a cover slide and an agenda slide, let's do 10 minutes and get that done.

**Design Considerations**

Okay, a couple things, just walking around, I got some questions about, mostly about design, so one, like a couple questions were about just what images to use in the slides, is stock photography okay? Should you even put images in slides? And, you know, I'm okay with you putting images in slides, stock photography is perfectly acceptable, make sure you purchase the images, so any images, like, and you see in any decks, I use, I personally just use, I stock, I stock photo.com and I just buy credits and you go up there and you download images, so you should pay for those images, you shouldn't go on Google and just steal images, because technically that's, you're not supposed to do that.

But, yeah, stock photography is fine, what I would, what I would just say is keep it consistent and clean, so what I mean by consistent is sometimes when I've looked at what, again, I've been looking at a lot of your pitch materials and one of the problems is they're all different color fonts, they're, you know, different colors, different fonts, different layouts, different design, and it looks like a ransom note.

So one thing you want to, one thing you want to do is make sure that you have a consistent look through all your marketing, so your website and your pitch deck and your business card and your shopping all box, the one thing you want to do is make sure it looks consistent, that's and clean, because you don't want to muck it up too much, I don't like graphics behind text, graphics behind text makes the text difficult to read.

I don't like a lot of reverse copy, reverse copy is white text on a black or dark background, it is proven to make it difficult to comprehend the copy, so, you know, again, I'm okay with it if it's in small amounts, but if you actually want them to read what is on the page, do not use reverse type, okay, again, that's white text on a black, a little bit here and there fine, perfectly fine, you can add interest, it can add contrast, just don't make your whole deck dark with white text, because it's going to be very, very difficult to read.

Now, you can go on Upwork, I know Todd was saying he used someone on Upwork to kind of design his slide deck, the other thing that we are going to do at some point over the quarter is have Mike Stodola do a session on how do you get the cons, so just rough out the draft of your deck and you can upload it and use AI to design it and make it look nicer, okay, but we're not going to do that today, what I would just, what I would really focus on today is not so much the aesthetics, because you can go back and you can clean it up, and you should also have your decks proofread, by the way, because typos, typos in the deck stand out like a sore thumb, like we can't see our own typos and you're trying to get a check out of someone for, you know, $5,000, $10,000 a month and have them trust you with their network and your decks full of typos, that would make me second guess your attention to detail, so make sure you get it clean, make sure you get it proofread, and then again, we're going to have a session where you can use AI to make it look pretty, okay.

**The Pain Train**

Okay, now let's talk about starting the pain train, okay, I'll remind you 70% of all buying decisions in business are made to avoid a loss, so we are far more motivated as individuals to avoid a loss than we are to get a gain, but most people, sales people pitch the gain, you're going to have more uptime, you're going to have, you're going to be more productive, you're going to save money, and I'm not saying that those things are bad, I'm not saying that, don't misunderstand me, there's absolutely a place for that, but if, but the reality is an undisturbed prospect never buys, so peg one, square one of the sales board game is that we have to agree on the problems that you have, because if they don't think they have a problem they're not going to buy the solution to a problem they don't think they have, does everyone understand that?

Now we're going to have Rusty, I think it's tomorrow he's going to do a session on how to have a risk conversation with your clients, right, so in order for someone, so to give you a framework of risk, risk has three components, there's the probability that the risk or the threat is going to happen, how likely is it you're going to get in a car wreck, how likely is it that the plane is going to crash, how likely is it that you're going to get ransomed, so there's probability, then there's impact, is it going to be a minor inconvenience or no impact, or is it going to be a devastating loss that's going to be significant, a significant problem for you.

If they don't, if they think the probability is low, if they think that the impact is low, what do you think the chances are they're going to buy, whatever it is you're selling, low, right, and then the third is the third component of risk is how quickly can you recover, meaning do you have insurance, it's what insurance is for, it's like we could do everything we can, everything possible to try and protect your clients from getting ransomed, but there's still a possibility it's going to happen, so what you can do is mitigate the risk, so you can lower the probability, you can lower the negative impact, and you can provide some relief on the recovery, so like when Rusty's selling insurance, buying insurance policy does not like lower the probability, and it doesn't, it doesn't impact the impact it could have, but it does allow for recoverability, does that make sense?

So when you're talking to a prospect, you have to think in mind, do they think the probability if they don't buy is the probability of bad things happening very, very high, number one, number two they have to buy is, is this the impact of high, like whether it's hiring the wrong IT company or not buying cybersecurity solutions, they have to think that the probability is extremely high that this is going to happen, and when it happens it's going to have a great impact, and if you don't sell those two things, they're not going to move forward.

Okay? So you've got to really, when you start this pain train, their surface problems, and I want you in your deck to have a slide, at least one slide that summarizes the problems that they stated, that they have, not what you think they have, what they said they had, and what that does is it shows that you're paying attention, right?

So here's what you told me you had, you're frustrated because you can't get a hold of your current IT guy, it's taken way longer, problems keep coming up, and we are summarizing them, they might not be technical, they're probably more customer service related issues, and you want to summarize that on one slide, okay?

Then the next slide or slides is, but wait, there's more, that's the part where you're saying there are deeper problems going on, this is where you would use, if you're using audit, or even galactic, or whatever you're using, the red, yellow, green, okay? Here's the really significant problems that got to be fixed immediately, here's ones that are looming, we need to address, and here's the things that actually look okay, right?

Do not get too technical here unless you're selling to a technical audience, now if you're selling to the IT leader of an organization, some sort of a co-manage, that person probably does care a little bit more about the technical details, if you're selling to a CFO, they don't give a rats butt, okay? And if you get too technical, you're out of rapport with them, because now you're talking over their head, they don't understand what you're saying, they don't want to say they don't understand what you're saying, because they don't want to look stupid or foolish, so they just sit there and nod and smile, and then they say, I got to think it over, because you just confuse the hell out of them.

This is also why you won't get another meeting with them, because they don't want to sit there and go over technical jargon, they want to talk about costs, they want to talk about risks, they want to talk about business impact, all right, so don't get too technical, don't just sell the problem, convey the consequences, you have to get into the consequences, the impact areas, again, rusty session tomorrow, we'll show you how to have that conversation, and they need to feel anxious in PO by the end of the section, they need to be angry that the current IT company has to feel like they're being let down, ripped off, not taking care of them, and they've got to have a high level of anxiety, that if I don't get this fixed, so at the end of this section, if they're like visibly or verbally saying they're anxious, they're fearful, they're worried, you've done your job correctly, okay.

Now, here's some examples, again, this is Lisa, so this is a slide deck from one of her clients, you're not cutting and pasting this folks, all right, this is where you're actually listing, I'm just giving you an example, this is an example of one somebody that she was presenting to, there's a complete lack of IT support both day, day-to-day and strategic, you understand you're not secure lacking critical, so there's an acknowledgement there, you acknowledge you're extremely vulnerable, you were told by your insurance agent to get a technology provider, you had a past incident compromise on Google and you want these problems addressed, right.

Now when I'm sitting with that prospect, I look at them and I say, is that is that still correct, is there anything that's changed or anything that I've got wrong, and see now they're agreeing and they're saying, yep, that's exactly the problem I have, like we have to be in agreement, that's still being in rapport with your prospect, we have to agree that these are the known stated problems, okay, but wait, there's more, okay, because we did an audit, and by the way, your sneaking suspicion is absolutely correct, because there are serious gaps, failings and dangers in your security and compliance, and it's urgent, we remediate this, because this is what your score looks like, do you see what I mean, and then you're going to dig into that a little bit, okay.

Now this is Todd's, now this is more what you would put in your deck, you just have a, this is a holder, like you can see pain disclosed during discovery one, discovery two, like, so Todd just had this, just as a placeholder slide, and that's all you need to do, you just, for now, just create a placeholder slide that says your problems previously discussed or whatever it is, okay, and then what Todd does is, here's the baseline summary, now he displays the problems a little bit different, okay, so he is, he's taking these, so this is their overall score is 61 out of 100, so he's saying, okay, there's some managed support, security, infrastructure issues, this is the way he displays it, and then I believe this is a galactic image here that he's using, and he's giving them a cybersecurity rating of very poor or, you know, poor, and these are the issues that we uncovered, and here's the score, okay.

So everyone got it, so you're going to create, you're going to take 15 minutes, and I want you to put one placeholder, just a placeholder slide with a title on the top, so that you can put in the known problems that that prospect said they have, I don't think you need more than one slide, just do one slide, and then I want you to create two, three, maybe four, but really three slides should be enough, just to kind of cover the high level because you're giving them a score, you're giving them a visual, and, and, you know, you're building that pain train, now, there may be more things you want to put in there, and obviously you're going to have to have a placeholder because, like, like this, if, if Todd were to give this to his, his sales rep, he knows that they, he would have this image here, and issues we've uncovered, and he would have item one, item two, item three, you know, we get up, up, up, up, up, up, right, so normally you're going to customize this for the prospect you're talking to, for now you're creating just sort of the placeholder and the process, if you will, of how you're doing that, does that, does that make sense?

**Why Us - Your Unique Value**

Okay, now, the next segment, so again, we've set the agenda, we've gone over, here's all the known problems that you have, right, and now we're getting into, here's why we're uniquely qualified to help you solve these problems, here's why you want to do business with us, now as a reminder, you should have already sent out a shock in all box, that should have been after the qualification call, and before you do your discovery meeting, there should have been a shock in all box that goes out, that build your credibility and helps position you, right, but let's make sure we don't hope that they read it and remembered everything that was in there, okay, so I want to play a quick video of, you know, why selling why you is important and really selling it, meaning here's why we are really better than everybody else, all right?

Okay, so I've narrowed it down to two lawyers, do you know your rights? Because I do, if you are weak, I will fight for you, and if you are strong, we will fight together, I am Zumanikirouz, like her, yeah, check this guy out, we've been injured in accident or a slipping fall, call me Walt Worsh, I'll try my best, I got hit by a city bus, and Walt got me some of the money I asked for, I got arrested for drunk driving, I got found guilty and started six months, but I could tell Walt tried as hard as he could, he even cursed when he lost, caught three and three Walt tries, I'm Walt Worsh, and I try my best, he included testimonial from a guy who lost, I mean I think we got to go to Zumanikirouz.

So it's just a funny thing, you know, like hey, we'll try really, really hard, so you got to do a little bit better than that, okay, so now the why us, so in your slide notes, so one of the things that I do when I'm creating presentations is in the notes I'll put like my talk track, so at this slide this is what I should be saying, that's just what I do, but what you want to verbally be getting in the habit of doing is after you've delivered all the problems, the pain, the shortcomings, the failings, the risk, you say look, I know this sounds really bad, but the good news is you've got a problem that we solve around your every single day, now let me tell you why we're uniquely qualified to help you, all right, you want to, you want to just be able to get that to a sound might talk track that is your transition to talking about why us, all right, and what I would create in your deck is one of three slides is summarize how you're different from other MSPs, why you can be trusted to solve their problems, and make sure you interpret the value, so this is something, this is something I learned from Dr. Nito Cobain, right.

If you've, how many of you are familiar with High Point University, right, in Nito, right, outstanding place, but like when Nito first took over a high point he did a lot of things that he was changing, and one of the things he did was he put a stake house on campus and made it free to every student to eat at the stake house once a week, provided they made reservations, showed up on time, dressed appropriately and didn't have their cell phone, they also then had the wait staff were all instructors, so the idea was they would correct the students on how to eat properly, how to, and table manners, et cetera, and when he first did it everybody made fun of them and said this is ridiculous, why would you have a stake house, this is frivolous, what does this have to do with a higher education, et cetera, et cetera, so he had to interpret the value and he said to parents, he says look, you know, you're sending your child off to school so that they can learn a profession, so that they can interview, you know, for a higher paying job, and they have to learn social skills or soft skills as much as they have to learn hard skills, because if they're sitting at lunch with either a prospect or a potential employer, and they grab the fork and they stab it into a stake and start sawing away on it like it's an old shoe, and then chewing with their mouth open and checking their phone, and just generally having bad table manners, their chances of getting that that sale or that job go down exponentially, so we are not doing it frivolously, we are doing it because we want to make them the most successful human being possible, and when he interpreted the value people got it, and then now all of a sudden there's a bunch of universities that are copying them, right.

So you have to, you cannot assume they understand the value of what you're doing, so you've got to interpret the value verbally, add testimonials, award or other data to support while you're the superior choice and solve their problems, okay, so this is Stevens, why choose us, he's got the, you know, concierge support, unsolvable, solved, and values driven, we run on EOS, a client sat scores there, picture of the team, he's got client reviews and rewards, or excuse me, let me go back, I click too fast, client, so this is one slide one, this is slide two, and then slide three is his unbeatable guarantee, not satisfied after 60 days we've got you covered, and he offers an out on their agreement and three months fees to your next IT company, okay, so there's, that is in Stevens, now Lisa's is three reasons why we're uniquely qualified to help you, which is a really good headline on a slide, because that way I will remind you to say that when you're in the presentation, we specialize in construction companies, five star customer service, commitment to excellence, now one thing I will point out is Lisa doesn't only do construction companies, although that is one of her concentrations, so like if you're sitting down and they're not a construction company, obviously you don't have that, so you are free to have maybe five things and you interchange them based on who you're talking to, so if, for example, they say to you, we absolutely, one of their concerns, their pain points is they need to be compliant with a certain HIPAA, or PCI, or CMMC, or whatever it is, then you want to make sure if that's one of their goals, if that's one of their pain points, that one of the things you talk about why we're uniquely qualified to help you is one of those things, okay, so you can customize, you should customize this part based on the customer that you're talking to, all right.

This is Todd's more responsive faster solution for your problems, and again, just remember that Todd is going to be talking through these, these are just visual prompts, so 96% of all support calls made during business hours are answered live, 83% of problems tickets have been resolved, Todd, I think I added that, so I hope that's true, clients report 52% reduction, well, you get the idea, right, so still, like, don't depend on this, don't try to make the slide the sales letter, you're putting in just prompts, and then you should be talking through these points, okay, so don't write it all out on the slide in seven point, you know, copies, so small, gotta get everything on there, you're using these as talking points.

This is Adam Spencer, he's got the firm overview, and that's a picture of him with the sharks on Shark Tank, when we had that Shark Tank competition, relevant publications, he's got his Amazon bestseller, he's got the magazine, influence and inspiration, we're always learning from the best, he's got pictures of him with celebrities, so he's got a little bit more in this section than a lot of other people, response time, so he's got here details on his response average resolution time in the last 30 days, initial response, customer satisfaction score here, and then how to receive support is easy as one, two, three, easy button, so he actually has a physical easy button device that plugs in the computer and they can just tap that, and that creates a screenshot of the last 15 times the mouse was clicked, and gives him an overview of what was going on, they have phone support and email, okay, so this is his talking points.

This is Roland Parker, he's got why choose us, this is one like Roland and I haven't had a chance to work together on this as much, but this would be an example of why I don't like reverse copies so much, because it's so intense when you look at it, your eye doesn't get any rest, but still the content is very good, so Roland has a very good, so I'll give you this as well, why us hear some things to talk about, even if you have nothing unique, like you try your best, like Walt Warsh.

Specialization, if you can specialize, then talk about that, customer service and experience, five star reviews, guaranteed response time, everything will just work, peace of mind, hassle, free vendor management, true professional services, so like if you are providing really true professional services, where you have a fractional CIO, where you have or CISO, where you're doing real account management, they have a dedicated account manager, budgeting and road maps, you're doing the QBRs, you're doing the things that like Paul Sissel's been teaching us, and we've been doing in the account management masterclass, and well Noble's been leading that, if you're doing that, guys, that is a huge differentiator, because I'm telling you the vast majority MSPs don't do it, they don't have a dedicated account management team, they are not doing QBRs, they do not provide a budget or a road map for their clients, they're not doing those things, so if you have that, like showcase that risk mitigation, legal compliance, cybersecurity employee problems, onboarding and switching will be easy, and why are we the safest choice, so that your celebrity materials, okay.

So we are going to take another 15 minutes, and I want you to create two, three slides, Adam has I think five, but they're all very, very good, I want you to create a little mini section of why should they buy from you, all right.

**Sequencing Strategy**

Okay, so another question that came up was about the sequencing, and so you guys know we've set up the agenda of the meeting, here's what we're going to talk about, we've talked about, their problems, their concerns, but wait, there's more, we initiate that pain train, and then what some people have said, well, why can't I go to selling the solution at that point, why then why us?

I'm okay if you want to play with it a little bit, but the reality is so when you get into the selling of the solution, when you get into, here's the actual plan, we're going to sell you, you're getting into that plus the money talk, and you're going to be asking for the order, so that kind of goes together, and then to say, well, here's why we're qualified to help you after that is awkward, if that makes sense, because the minute we start to talk about the solution, we're already talking about money, and the two of them are going to be linked, so that's why I want to take first to say, here's why you want to trust us as a company, you're selling, they have to be sold on you, the individual, they've got to trust you, they've got to be sold on you, the company, making sure that you are the right company, that they can trust the company, and then the third thing is they've got to be bought into the solution, so we've got to get a 10 on all of those things, right?

If you've been doing a good job, and you've built rapport, and you're listening, and you're paying attention, then they're liking you, they're sold on you, so anyway, so that's why we do the why us, because now we're going to get into selling the solution, and explaining how your approach is in methodology or different, but remember, there's no power or advantage in your package or tech stack, unless you can explain it in a way that's going to persuade them, like I said, I don't care if my landscaper shows up with a pair of scissors, or a riding mower, as long as the grass gets done, the way it should get done, right? Your tools are entirely up to you, again, if you're selling them a very technical prospect, they probably will care about the tools, but for most CFOs, they're not going to get too much into the tech stack, right? They're not buying your tech stack, they're buying trust, they're buying, can I trust you to fix the problems that we have, right?

So do not just walk through a technical detail proposal at this point. Most proposals are parts list of hardware software services, they don't sell the value, they don't influence or persuade, they don't explain why something is needed, and they can be given to the incumbent MSP for you to beat, or for them to beat you on the price or replicate.

So I'm not a really big fan of giving all the detailed parts list, okay? So the other thing that you want to do is explain why your approach is different and help them. So we're still kind of on the YAS train, if you will, but we're getting into selling the solution a little bit, okay?

So remember, this is all, it's not like you go from here to here to here, you know what I mean? It's all kind of fluid, this conversation is very fluid, right?

**Your Unique Approach**

So how many of you remember Satima's prose model, the iconic, so this was her way of saying, here's how we're different, we bring you a prose team which is proactive, they have a proactive team, a reactive team, they take ownership and strategic, right?

So a lot of people like this framework of explaining it, and I do like having a way of explaining why your approach is unique, all right?

And I'll give you something new that we have been working on, which is what makes our approach unique.

And we came up with this acronym ACE, which is when most MSPs come to us, they think they have a marketing problem and they do.

But if we purely do what most marketing firms do, which is just start doing advertising and marketing with no strategy, no selection of target market, no thought through what value differentiation, no CRM, no inbound lead handling process, a dysfunctional broken sales process, and on top of that, your packet, your priced way too low, the whole thing is going to fail, because the A is the lead generation piece, like you've got to attract more leads in, but then the other part of that is to convert, so you've got to capture the leads, you've got to appropriately follow up with the leads, you've got to close the deal, so there's a sales process, and if they don't buy or they don't set the appointment, there is drip marketing.

And then the other part with the expand is once you close them, you want to make sure you have appropriate pricing and service delivery and good account management in QBR, so that way you make every single customer more valuable.

If your pricing is too low and we happen to add more customers to it, I'm going to sink your ship, so our approach is we cover all, and I have a whole talk track around this, we cover all three of these, and by the way, if you get an increase in each one, it's not a, like if I got a 10% increase in each of these, it's not a 10% increase in your business, it's a 51% increase in your business, and I can show you the math of how that works out.

But the other part that's different or unique is we're starting with the E part, which is the proper pricing and packaging, and then we've got to build like a good website, because you're driving people to a website, but your website's dysfunctional, because you don't have a phone number on there, you don't have any lead generation.

We've got to handle how you handle inbound phone calls. I can't tell you how many clients we do digital marketing for who still don't answer their damn phone.

And they're saying that marketing doesn't work, and it is working, they're just not answering the phone, they have no way of capturing leads, it's going to the technical department who's saying, you don't want to, you know, we don't do break fix, call a competitor.

I mean, it's just like this, like so most MSPs are grossly unprepared to handle even inbound leads and to get more customers, so if we don't fix the other two first, the whole thing is going to fall apart, right?

You know, and I have a whole talk track, so that's what this is how like we are differentiating ourselves, this is a point of differentiation in our approach, okay?

Now, this is Stevens, leading IT has the safer advantage, he used the acronym, safer, secure, advise, fast support, education, reduce risk.

So, you know, he's, again, guys, remember, the slide is just to prompt, you're going to verbally walk people through what this means, okay?

Roland, I really like what Roland did. Now, this is a long acronym, because Empress is the company name, and he used this, but he took every letter of the company name and turned it into something of their approach and the way they do things.

I'm not going to read the slides, because I have, I'm a little over on time right now, so I've got to go quick. Lisa came up with smart, so she's, everything that she is branding around her clothes is smart, so smart onboarding, smart support, so that means secure monitor, advocate, respond, and transform.

And again, this is just her acronym and her visual on that, and then when she's in the sales process, obviously she's talking about that. Todd came up with focus, foundation, optimization, customization, up-time security, that is their unique approach.

I have to candidly say this one's my favorite, because he sort of took Satima and myself, and he kind of took both, because you guys have heard me talk about wanting to be a real MSP, not a tech with helpers.

So he kind of said, we give you a team of pros instead of techs, and is explaining how their approach, the pros approach is different than the other guys.

So I like this because it has sort of like, here's us compared to the other guys, I do like that.

So do you have to have an acronym, not necessarily, but if you are going to do that, then that's great, so you have a couple examples here, and we're not going to get it done, I'm going to give you 15 minutes, and I want you to think about your approach to solving IT problems.

Why is it different? I would say one thing, if you are even remotely strategic in your approach, you are so different than the majority of MSPs that are out there, I know you have to trust me, because this room is a different room than the majority of MSPs that are out there.

You don't see them like I see them, they're putting cheap band-aid fixes on things, there's all kinds of holes in their service delivery, they do not have good account management, they are not doing QBRs, they are not doing advanced cyber in any way shape or form, they are definitely not doing compliance.

So I'm just telling you, the majority out there is not what they're doing, it's like their clients networks look like a Frankenstein monster that's been pieced together over time, and it's a rambling mess, you probably know because you've gone in to clean up the mess after they've done it.

So I want you just to noodle what would be your approach in explaining how your approach is different than most other firms, so let's go ahead and do that.

**Clarification on Approach vs Uniqueness**

Alright guys, a couple of things, so I know that this seems like the approach isn't the same as what's unique about us, and people are having a hard time with this, let me just say this in this section.

As long as you can convey, here's why we're uniquely qualified to help you, here's why this company, our company, our approach is going to be better than any other IT firm you're working with, now do you have to have an acronym like I've been showing you, no you do not.

I don't think it's going to make or break the sale if you have an acronym versus you don't.

I know a lot of people like Satima's pros, model, and they like that acronym for a way of explaining the approach, so I was giving you examples, if you're really struggling with it, just leave it out, but at least have three points of why somebody should do business with you.

That's the end of the day, that's what we care about.

So with hours, it's another way of differentiating us, so when we say you've got to ace your business, so when most MSPs come to us, they think they have a marketing problem, and they do, but the problem is bigger than that.

It's not, if you do what most MSPs do, they go hire some marketing firm, they hire an SEO firm, then a web design firm, then they hire telemarketing firm, and then they hire this other branding company, and all they do is write checks all along the way, getting more and more frustrated, making no progress and getting nowhere fast.

And that's because you're right, you do need more leads, but we've got a backup and solve your pricing problem, because there's like 99% of MSPs that come to us when they initially come to us, they are underpriced.

Their service packages aren't really well done, so they're not profitable, that's the majority when they first come to us, they're not profitable.

If I add more customers to a non-profitable business model, I'm going to sync you.

The other problem then is you have no sales process, you think you can sell because you've been selling to the lowest of lowest hanging fruit referrals, and referrals with a known need that are coming in hot, buyers in heat.

Well, anybody can close them. When you start going out into the real world where they wake up in the morning, eat their young and then turn on you, you're going to see your close rate tank, because you have no sales process, you have no differentiation, you do not know how to explain your value, you don't know any of those things.

So even if I was successful in generating more leads, you can't close them. At the right price point, you have no sales process, you have no CRM, you have no way of handling an inbound lead.

Believe me, I have secret shop thousands of MSPs. It is abysmal, and if you don't have a way of handling that inbound lead when it comes in, so that not only you qualify it, but you sell them on getting the next step in the appointment, you have a good sales process, you have appropriate pricing, you have good testimonials and reviews, you have a good strategy.

You have a good story to tell, you can differentiate. If I don't have all that in place, and I just add more leads, you've got a giant hole in your bucket, which is why you're so frustrated all the time, and nothing has worked before.

So when I explain that to someone, they go, that's right, that makes sense. So our approach is we start by making sure your packaging price properly.

So like we were just having this conversation with a member who sent somebody through rapid, we are changing the way we do rapid implementation, so it's not starting with marketing, we're starting with packaging pricing contracts, we're starting with getting a CRM in place, an inbound lead process in place, your website, things that we once the lead comes in, now we can be productive with it.

Because if we just put leads in, you're going to be unhappy. Now when I say that to people, they nod their head, they say that makes sense, and because I'm taking this approach, I'm demonstrating a level of expertise that I am a true consultant, I'm not just here to sell you more leads.

I'm not here just to sell you a Facebook advertising plan or an SEO plan, I'm here to really help you get what you want, which is you want more money. Isn't that what you want?

I mean, if I could deliver 100 leads to you, or I could deliver like 100,000 more in profitability, which would you prefer? Well, I'd rather just take the profits, thank you very much.

So we got to approach it different. Now why would you work with us? In addition to that, we specialize in working with MSPs, we run the largest peer group in our industry, which gives us data and feedback, and that's how we base all the things that we're basing it on.

And we have more documented client success stories than anybody else in this industry period. That is true, and you can verify it before you even buy from us.

So the approach is important in the story, because I'm teaching you when you come work with us, this is the approach we're going to apply.

And I have to tell you that, because if you come in and you want more leads and all of a sudden we start talking about your pricing and contract, you're going to be like, what the hell? I thought you were supposed to get me more leads, right?

So that's where you have to explain your approach to supporting and delivering IT. Why is it unique? Why is it correct where most everybody else doesn't do it properly?

Does that help clarify? Now, if you cannot figure out an acronym or an approach, leave it out until you work it out, and then just at least have here's why do business with us.

Don't trip yourself up. I mean, when we were working on this in the group, this is what took the longest. All the rest of it was relatively easy.

**Selling the Solution**

So don't let this hang you up. So we've explained the approach, we've explained why us, and now we're selling the solution, the services and the fees.

So as you walk through, and when you talk about the solution, you're also talking about price and fees, they're kind of together.

And we've told you, like again, always have an either or option because the close then becomes which one are you leaning towards, and then even have a third option in your back pocket that you might drop down to, but I like plant A or B.

Now, again, I want to be very clear, never sell a client less than they need, and you are going to be strongly recommending one and talking through one specifically, point out both will solve the problems, but really focus on the plan.

You think is most appropriate for them that they're going to be happiest with and why that is and walk them through that, keep verbally tying back the things you do to how you're going to solve their problems.

You know, the reason that you're having bad response time is because of this, because they're outsourcing their support to a third world country, and you don't know who it is, and that's why you're having to repeat yourself on the phone all the time, because you're getting a different person every time, and they're not taking notes and they're not taking history.

And our company, all our engineers and techs are local, so the person you talk on the phone could actually walk through the door, which was like leases, I don't know, where's leases, she here?

She's not, yeah, that was like from leases, she had it on her deck, which is like the person who you talked on the phone could physically walk through your door as well, so these are your notes.

So you have to, just remember, a lot of this is going to be verbal conversation that you're going to be talking to them through, and at this point you're giving specifics on your fees.

The other thing is just to be prepared to explain why they're reasonable, even if they're going to be spending more than they typically did.

Now again, I'll remind you that you should have floated price by now upfront in the discovery meeting.

When you sat down with them for an hour and you did more thorough diagnostic discovery meeting, you should have floated some price at that point before you did your assessment, before you did the proposal.

So, Mr. Bob, I'm not sure exactly what our quote is going to come back, because I actually have to do a deeper diagnostic or a techno assessment to see what's actually going on here.

But I can tell you a company of your size typically is going to be spending, there's probably going to be some projects, that's the thing I don't know what the projects are going to be, because I don't know anything about your environment.

But I can tell you just for ongoing support is going to be somewhere around $2,000 to $3,000 a month. Is there any issue with that? Do you have any problem with that?

Is that within your expected budget? Now, I am floating that in the very, not the qualification call, but in the discovery meeting.

And if they pass out and say there's no way I'm going to spend that kind of money, then you need to have that address that concern, air it out like we talked about.

And decide whether or not you're going to move forward, because you can say, well, look, we do have more budget options for a budget conscious customer, but they're not going to be below $2,000.

And if you're looking for $200, we're too far apart, there's no point in going through the rest of this exercise.

So remember, when you're giving them the fees, this shouldn't be the first time you've had a price conversation.

I will also remind you if you watch the previous session, we talked about floating price in this meeting early on saying, hey, we came in right around the budget that you expected.

I'll get into the details here, but it came in right around $2,500, which is what we talked about.

Because sometimes people are anxious about the price. They want to know the price, so you kind of leave a little pressure off that, and then you're getting into that.

So remember, this should not be a shock for price. And then again, the trial closes, which one are you leaning towards.

So again, a sound bite would be a company of your size should be spending somewhere in the 4% range of top line revenue for IT expenses.

You're currently only investing 1%, which is one of the reasons you're having so many problems.

The other reason you have so many problems is your current IT company's going to do XYZ, which you're reiterating, which is putting it risk.

As we talked about, that's why your environment is not secure in the way that we showed you.

So this was a slide that Satima used, this is an example, like they have, they named their plans.

So there's the Denali, there's the Olympic, and she's got the pricing there. So that's an example of how Satima's slide look.

This is Lisa, everything is great start, so installation of tools, remediate, technical, critical vulnerabilities, and then move devices.

And she's got her option, here's option A, here's option B, and then she says either one is going to work for you.

I think you're going to be really happy with the gold plan, here's why, but which one are you leaning towards.

And then that way you're opening up a negotiation, why saying negotiation, you're opening up a discussion.

So all throughout your, when you're closing, throughout the whole time, you're always checking in to see, are we still in rapport?

Are you still with me? Do you still, you know what I mean? So we're constantly, they sometimes they call it a trial close, but you're constantly just checking in to make sure that we're still in rapport.

Okay, Todd is this, this was his, he said, hey, we've got phase one, which are some, some implementation of critical fundamentals, then they had a project, I guess, of a firewall or server update.

Here's the managed services plans and how he's presenting it. Steven actually had a good recommendation for him. He's only got three things that are different between this plan and this plan, but this plan is like $1,200 more.

So this, we told him we need to stack more value. In other words, like, there's like, you know, I'm looking at these two things, I'm going to choose the cheaper, because do I really need cyber watch, server failover and failover internet?

I don't know, maybe it's worth it, maybe it's not. So we talked about that, all right. And then what Todd also had in his deck, which are like, which is after six months, after we implement this, here is what your score will be, because you had a 48, we should be at an 85, and that's going to be after six months, and then we're going to continually work to improve that. So that is the goal. So going for the goal, this is how Adam said, here's the third.

So he shows this on the slide, where here's where you are, and this is the goal, I guess, after 90 days, this is where we're going to be. There's still going to be some things we have to remediate and fix, but that's where we should be.

So what I want you to do is I want you to mostly just take 10 minutes. This shouldn't take you long. Again, if this is going to be customized for every client, but I want you to sort of placeholder slides, or if you can use a current quote that you're working on, here's the recommendations, and here's the price that we're going to ask for.

**Getting Into Details**

So go ahead and take 10 minutes and work on that. Some of the questions that I have had is really about how much detail do you get into? That is always the question, because you don't want to get into too much detail, but at the same time you still have to let them know it's included.

So when we're selling one of our platinum websites, I can't just say platinum website, line item. I've got a detail out a little bit of what they're getting, what about changes and updates, what about who's writing the copy, what about hosting, what about tracking, what about my Google business profile.

So you do need some level of detail to say, here's what we're including, but highlight the things that are important to deliver the service. Don't get into we're using webroot or we're using galactic or we're like, don't get into the tools and everything that you're using, because then you're getting too much in the weed.

So this is a balancing act, try to get headlines and summarize, if we're like, okay, one of the things, what's one of the basic things, help desk support.

Well, talk about have help desk, phone support is included in here, onsite is included, after hours is included or whatever. So you have to figure this out where it's detailed enough where they know what they're getting, but not so much in the minutia that they're getting tangled up and asking questions.

So it's one of those things that there's an art and a science to it, and I can't give you across the board because everybody, their service offerings are all different, so I can't just say here's the model, all right, but just try not to get into really, really minutia detail, okay.

And again, the criteria is does this build more trust in certainty or does it confuse and detract? In everything you do, it's got to build trust in certainty, because they might be looking at your quote versus another competitor, and if you've got to make sure that yours looks competitive and complete versus other people that they're looking at.

Does that make sense? Okay, I know it's a little fuzzy, it's one of those things you have to work on.

**Asking for the Order**

All right, now we're going to be asking for the order, and asking for the order, okay, so we've gone through, here's why us, here's our approach that's different, here's the plan, which one are you leaning towards? So they haven't said 100% yes, but remember, so let's say you show them the plan, which one are you leaning towards? And they're like, wow, I don't really know, is that someone who's high on certainty or low on certainty? Low, okay.

So, well, I think you'd be better with the plan B, okay, because plan B gives you A, B, and C, and so forth. So, how do you feeling about that plan and this approach that we've talked about so far? And they say, that looks good, are they high or are they low?

Somewhere maybe in the middle, do you see that? So the whole time you're doing this, you're taking sort of like a little mini pulse check to see where are they on the certainty level, right? So then, so now you've got more work to do, okay.

Now, so then this allows you to, so there, let me, one of the reasons that I have you talking about the plan and doing that check in, and then talking about the onboarding is because it gives you another opportunity to go back and, and, and like to use a wolf of the wall, of Wall Street to loop back over the benefits.

So now let's, okay, so let me tell you about the next steps. So like, let's say they say, yeah, it sounds pretty good, it sounds okay, right? So you know they're not high on certainty. Okay, well let me tell you about the next steps, all right.

Because one of the big problems that a lot of you have in getting somebody to move forward is they're concerned about the, about changing IT providers. How many of you feel that that's a very common issue? Okay, so if we know that's going to be something that's going to stop somebody from making a decision and cause them to hesitate.

We got to address it. So this is where we're addressing it, and we're using a story brand kind of framework where we are, we are using a three step process, and we're trying to remove the fear of moving forward because people don't move forward in the mystery. They want to know what's going to happen. So I say yes, what happens, what does that look like, right?

And I want you to get it down to three steps. Okay, step one could be on board after you prove the paperwork, we initiate onboarding. Step two is we do a deeper diagnostic and analysis of your network, documenting systems and so forth, and then we deploy and we implement the plan. Okay, does this sound good, is any, any problems with that.

So this is just an example, okay, it could be a lot better than this, it could be a lot worse if you don't even have it, but you know, this is just an example. Now if you remember, Satima had this, she had a slide where she said what to expect during onboarding, and she had this timeline. Now my criticism of this is that it's complicated.

It's kind of a lot to take in, right? So you do not want to make onboarding look difficult, complicated, and one of the things that I found when I was working with the group of people who are working with is that the actual onboarding process is don't give them that, give them the one, two, three easy.

If they want a more detailed process, have it. So for example, Adam, this is Adam Spencer, Adam has this as a very high level, okay, step one, we start here, step two, we do this, step three.

So it's like a five phase process of onboarding, and he has more detailed. If they want more detail, he can give them more detail.

But not everybody wants all the details. Some people will, but I think a lot of people won't know. This is another, again, he says then getting support is just easy again reiterating. This is how easy it is to get support.

David, who is here, will recognize this because like Satima's pros model, David's postcard has been copied a million times because it's really good.

Switching to embraces is easy as one, two, three. We do one, then we do two, then we go, you know, so discovery network audit, deployment setup, and then we go live, okay.

This is how Lisa kind of showed onboarding for the first 30 days. You pick a start date, sign paperwork, da, da, da, da, da, da, da, da, right, and then, but then she, so this is her more detailed and then she says but switching is very easy. Here's what we do, one, two, three.

Okay, so how we switch, this is Todd's, we discover, we align, and we improve, okay.