

Sales Approach System

Methods of Introduction:

1. Personal Contact
2. Telephone Approach
3. Social Approach
4. 3rd Party Introduction (LI, friend, referral, social/professional)
5. Pre-Approach Letter
6. Referral Sources
7. Business Partners/Affiliates
8. Email

Systematic contact method -

1. Research – to fit Ideal Client Profile and build list
2. Call for appropriate contact information
 - a. Name
 - b. Title?
 - c. Phone number
 - d. Email
 - e. Address
3. Introduction (letter)
4. Follow up 1 – (email 1)
5. Follow up 2 – (email 2)
6. Follow up 3 – (phone call)

Rotate this pattern systematically to a generally fixed number of “suspects” on a routine (monthly?) basis. For example – at the beginning of each month have 10 suspects ready and plan 1 hour to call/get contact information and send the intro letter; 2nd week – have an hour planned to send the follow up email 1; 3rd week – have an hour planned to send the follow up email 2; 4th week – have an hour planned to make the phone calls. Hopefully, by the fourth week, there will already be some appointments scheduled, some “no’s” and some “call/check in later”, leaving perhaps 5 or 6 to actually call. If you don’t reach them at this point, plan them into a longer term follow up, a routine newsletter, or drop them altogether.