



Increase Your Sales Performance
by **80%** with Ulistic's
17-Step Sales & Marketing Process
for MSPs



Ulistic's 17-Step Sales & Marketing Process

Each month, Ulistic works with both startup- and mature-managed service providers (MSPs) by assisting them in building solid marketing strategies and providing expert guidance to improve their sales performance.

We've developed a 17-Step Sales and Marketing Process designed to ensure our clients close more deals and beat their competitors. It's based on our successful KNOW, LIKE and TRUST method of turning prospects into clients. Our 17-Step Process helps track exactly where a prospect is in the sales cycle and provides "key-performance indicators" to track their progress.

The steps consist of easy-to-track checkpoints and can easily be inserted into any Professional Services Automation (PSA) or Customer Relationship Management (CRM) tool such as ConnectWise or Autotask to aid in automation.

Ulistic's 17-Step Sales Process incorporates four key-qualification checkpoints and three face-to-face meetings with prospects, as well as a number of other touch points to help you win you more clients.

Step 1: QUALIFICATION POINT 1 – You're fortunate to receive a lead.

Timeline – Day One

Leads come to your MSP business in various ways: through your website, a referral from an existing client or through face-to-face business networking.

Your job is to immediately follow up on any lead and qualify them. Begin by asking yourself: “Are they the right type of business for my company to work with?” A phone meeting can help you decide if you should pursue this opportunity. It's important to ask a few critical questions. Find out:

- The size of the business
- Their annual revenue
- The number of employees
- Their IT budget
- If they're already working with an MSP
- How many computer users, servers they have, etc.
- Any other technical questions or business questions that are important to you.

Also find out if they're interviewing or meeting with other IT service firms, and if so, are these meetings scheduled? Ask who the other firms are—Try to get as much information as you can.

Remember, you want enough information to qualify them over the phone. It's okay to say “no” at this point. Especially if you don't think they'll value your services. Thank them and politely pass up the opportunity. In this case, compose a letter recommending three of your competitors as referrals. You can download an example at: <http://www.ulistic.com/competitor-referral-letter>

If the prospect passes your telephone interview and they agree to a meeting to discuss their needs, schedule the meeting two to three days from this point. **Don't schedule it for the next day.** You want to be the last company to present to them.

Don't, under any circumstances offer pricing—You don't have the information you need such as the status of their network, the computer literacy of their users and other valuable insights. Simple state: “At this time it would be unfair to quote you a price for services. There are many factors that must be addressed prior to offering you a fair price for our services.”

If they insist on a price, they may simply be “tire-kicking” and don't value technology support. Or the person you're talking to isn't the decision maker. Keep trying to get a meeting with them.

Step 2: SEND YOUR NEW-PROSPECT QUESTIONNAIRE

Timeline – Day One

Many Managed Services Providers are keen to immediately qualify any prospect that graces their presence. Many times this can lead to future relationship issues if your homework isn't thoroughly completed. Countless hours are wasted on dead opportunities or tire kickers from day one.

Serious prospects interested in speaking to you about your MSP services will do whatever it takes to work with your firm. This is especially true if you are a proven winner in your marketplace. We will discuss the importance of case studies, technical reviews and client testimonials later. However, it's crucial to your success as a managed services provider to have an overflowing library full of great success stories of your work.

During Step 2, you will send them your New-Prospect Questionnaire. This important step will prove to you how interested your prospect is in working with your MSP business.

Your prospect questionnaire shouldn't be a long, drawn-out document. We all know how much detail technical companies want to have upfront—Trust me, there will be time to gather this information later.

Use your favorite online survey software or even an online form on your company website to collect this information.

What are you collecting? No more than six simple pieces of information. **Don't modify these questions. They're all important:**

1. The size of the company.
2. How many offices they have and where they're located.
3. Do they have a technology budget and if so, how much is allocated per year for support and new equipment.
4. Do they work with an existing MSP? If yes, who?
5. What is the one thing they wish their current MSP did for them that they aren't doing now?
6. Why are they looking to change MSPs?

Here is one question I will leave to you to ask. It's not mandatory, but heck, you have nothing to lose but a dead prospect. Here goes:

“Do you have any vendors you're currently working with that we can call as a reference to assess your relationship with them?”

Pretty bold—But they ask for references from you, why not ask for references the other way? You aren't looking for a long-winded dialog here. You just want simple YES/NO or one-sentence answer.

You must set a deadline for them to complete your questionnaire. If your prospect shows no urgency now, will they show urgency later? We're reminded about an important lesson: "How you do anything, is how you do everything." This is true for you as well as them.

Your goal is to work together in a professional manner.

Step 3: SEND YOUR MARKETING KIT

Timeline – Day One

After agreeing on a meeting date and time, and the successful completion of the New-Prospect Questionnaire in Step 2, send your Marketing Kit to your prospect consisting of the following:

- Testimonials
- Client Case Studies
- Technical Spotlights
- Company History
- Press Releases
- News Clipping
- Any other valuable information about your company.

It's important to tailor your marketing kit to the vertical market or technology you've been called to support. For example, use legal information for a legal opportunity or IT security case studies if a lead is looking for security support.

It's critical that you send your Marketing Kit immediately using a courier service. It must arrive before your meeting with your prospect. This allows them time to review information about your company and develop questions to ask you. This will hopefully also give you more time with your prospect.

Enter all leads into your CRM, PSA and email-marketing service so you can constantly drip-market to everyone that comes in contact with your business.

Ulistic can help your MSP develop your marketing kit. Visit <http://www.ulistic.com/marketing-kit> to learn more.

Step 4: DO YOUR RESEARCH

Timeline – Day One

- Perform research on your prospect immediately after sending them your Marketing Kit in Step 3 and between your first onsite meeting in Step 5.
- Use the information found in the New-Prospect Questionnaire in Step 2.
- “Google” your prospect, visit their website, their company profiles and individual profiles on LinkedIn, and call their competitors for information about them (this may result in another lead).
- Find out as much information as possible about your lead and what makes them tick. This is important.
- Print out their website and LinkedIn profiles and highlight key messages with a highlighter. Include this in your sales folder to take with you for your first meeting. (This demonstrates that you’re extremely interested in their business. When they see this during the first sales meeting it will impress them.)
- Call your prospect and ask some questions about their business. This also demonstrates that you’re interested in their business and also provides you additional valuable insight into their business. Ask questions about their company, executives, competitors and any industry trends that may affect them.
- Ask them the following question: “How would I know if someone we’re speaking with is a good lead for your company?” This gives you perspective on what type of company they’re looking to work with, and you may even have a lead for them.
- This step is crucial and must never be skipped. Get valuable insight into the personality type of your prospect. Are they a D, I, S, or C personality? Don’t know the DISC profile? Visit <http://www.ulistic.com/disc> or other your DISC-profile assessments, or learn more about the DISC Tool.
- After your telephone meeting, thank the prospect and make sure you mention that you’re looking forward to your meeting on “insert date and time here.”
- Make sure they received the Marketing Kit you sent by courier in Step 1.

Step 5: QUALIFICATION POINT 2 – You're Invited By The Prospect To Your First Onsite Meeting

Timeline – Day Three

The day has come for the first onsite meeting; this is an important part of the sales process. You actually have a chance to observe the business operations of your prospect for the first time and meet their key people.

- The day of the meeting, call your prospect before 9 a.m. and say: “Hi (INSERT NAME HERE), there’s a chance I may be early for our meeting as I’ll be visiting clients in the area. Is it okay if I arrive 30 minutes early for our meeting?” This allows you to confirm your meeting.
- Always arrive 15 minutes early for your meeting. There’s no excuse for tardiness. Arriving early provides you the opportunity to:
 - Look around the office to see what type of computers they have and the state of the office.
 - Get a basic sense regarding the culture of the business.
 - Survey the business landscape, artwork, awards and other clues.
- When meeting with your prospect, allow them to set the flow, but you control the agenda. If they are a “D” in the DISC, get down to business right away. If they are an “I,” discuss items you see in their office, or if they’re a “C,” they want facts and figures. You would know this information from your telephone interview during Step 2.
- Be sure you understand their goals and obstacles to their success. Capture as much information as possible without talking about technology. Ask detailed questions about their company’s goals, objectives, business strategy and what they need from a technology support company.
- The quality of your questions is crucial at this point. Find out valuable information such as:
 - Do they see IT as an asset or liability?
 - What is their budget for IT?
 - If they’re switching IT providers, why are they changing?
 - How can you make their business life easier?
 - How can technology help them meet their goals and objectives?
 - How can technology provide a positive return and increase shareholder value?
 - How can technology provide them a competitive advantage over their competitors?
- **Don’t engage in a technical discussion at this stage;** keep this purely a business discussion. If your business acumen is low or talking business makes you uncomfortable, hire someone who can do this for you.
- Prior to leaving your meeting schedule the following appointments if your prospect qualifies past this stage:

- A technical-discovery meeting, two or three days out.
- A project-overview phone call, four or five days out.
- **Don't book time for a proposal presentation at this time.**
- If at this point, you don't wish to work with this prospect, wrap up your meeting quickly. Don't waste your time. Graciously exit the meeting and send your non-qualified letter in the mail to the prospect. **Don't email it.**

Step 6: YOUR PPROSPECT QUALIFIED – Mail Your Company Comfort Letter

Timeline – Day Three or Four

Immediately upon your return to your office, mail a Comfort Letter to your prospect. Don't email this letter; send it out in the mail.

A Comfort Letter is a letter from an industry association, community group or business club that you are a member of. It comes from the association leader such as the president of your local chamber of commerce or executive director of the group you belong to.

It's not an endorsement of your services but a simple letter stating that you're a member and under this membership you adhere to strict guidelines and commitment to services.

- Some organizations that could provide a Comfort Letter for you might include:
 - Peer-group memberships such as [HTG](#), [Taylor Business Group](#) or [Gary Pica's Winners Circle](#). 
 - [VTN](#) or [Tech Select](#)
 - Chamber of Commerce
 - Rotary
 - [BNJ](#) group
 - Industry associations
- You're not restricted to just one Comfort Letter. It's recommended that you have many comfort letters on hand and ready to match the industry or needs of your prospect.
- Comfort Letters are written from the association, so you must use their letterhead.
- Print Comfort Letters in color whenever possible and mail them right after your meeting.
- Use the return address of your MSP business, but refrain from putting the actual MSP business name on the envelope.
- You want this Comfort Letter to appear as if it was coming from the actual association itself.
- Download Comfort Letter examples at: <http://www.ullistic.com/comfort>

Step 7: SEND YOUR ENDORSEMENT LETTER

Timeline – Day Five

- Just like Step 5, the Endorsement Letter is something you send out to the prospect via the mail (not email) using the company letterhead of the person providing the endorsement. An Endorsement Letter is a letter to your prospect from your top client endorsing your services.
- You should write the endorsement on behalf of your client and let them edit it as necessary. Focus on key items such as:
 - The length of time they've worked with your business.
 - What life was like prior to them working with you.
 - Key performance indicators such as service quality, response times and other measurements of your performance.
 - Quality return-on-investment data if available.
 - Other valuable insights into your business relationship.
- In the Endorsement Letter your top clients should state that they would be “crazy” to work with anyone else but your managed services business.
- Your endorsement letter must match the vertical market whenever possible or describe the technologies that are being used.
- It's perfectly normal to have a library of endorsement letters on hand and to send a number of endorsement letters to your prospect. Endorsement letters should be mailed the day after sending your Comfort Letter in Step 4.

Step 8: SEND YOUR MARKETING VIDEO

Timeline – Day Five

Do you have a marketing video?

- If not, order one immediately from Ulistic at <http://www.ulistic.com/msp-videos>. This touch point in the sales process is a critical one for outlining your services.
- Your MSP video maybe a bird's-eye view describing the value your company provides. It can contain client testimonials relating their story about how you've helped them.
- A best practice is to setup a landing page on your website and embed your marketing video on your website versus sending them to a YouTube link or other video service. This allows you to measure if the prospect has watched your video.
- Setup a separate landing page for each prospect such as <http://www.domain.com/prospect1>. With today's CMS systems this can be done very easily.
- Include a welcome message for your prospects and invite them to call or email you with any questions after they've watched your video.
- Setup an alert to indicate when a prospect lands on your video page.

Timeline – Day Five or Six

Many managed services providers make the fatal mistake of providing an onsite assessment too early in the sales process. They use a technical assessment as a key part of their marketing strategy.

- **Your prospect should NEVER see your technical discovery. This is an internal exercise for you only**, and important step in the qualification process.
- Your sales professional and sales engineer should conduct the technical discovery. During this stage you're looking for potential hidden landmines and doing fact gathering such as determining:
 - The age and condition of machines.
 - If computers have been patched and security updates completed.
 - If warranties are up to date.
 - The condition of cabling.
 - The age of computer systems.
 - The security of the network.
 - What staff members need.
 - Any other technical focus-points your company needs.
- This valuable information will tell you if you can take care of this prospect without any significant changes, or if a standardization project is needed prior to offering a fixed-fee managed services contract.
- This is a critical qualification point.
- **UNDER NO CIRCUMSTANCE should you ever install software or setup any sort of network sniffer without the written permission of the prospect.**
- If at this point, if you don't wish to work with this prospect, wrap up your meeting quickly; don't waste your time and graciously exit the meeting and send your non-qualified letter in the mail to the prospect. **Don't email this to your prospect.**

Step 10: SEND YOUR TECHNICAL COMFORT LETTER

Timeline – Day Five or Six

- After the onsite technical discovery has been completed and the prospect has qualified successfully past this stage, you must send out your Technical Comfort Letter. The Technical Comfort Letter is exactly like the Comfort Letter used in Step 4, but this letter comes from your Technology Partners.
- Most vendors won't endorse your MSP over others to avoid channel conflict, however there's nothing wrong with them stating the following:
 - Your MSP's certification status in their partner program
 - How long you've been a partner
 - What it takes to be a partner
 - The value partners play in their channel
- This Technical Comfort Letter should be sent in the mail after the technical discovery is completed.
- Download an example of a Technical Comfort Letter at <http://www.ulistic.com/technical>.

Step 11: QUALIFICATION POINT 4 – Project Overview Meeting

Timeline – Day Seven

The Project Overview is a meeting that can take place in person or over the phone. It's a critical part and final qualification step. The Project Overview is basically an abbreviated project plan that incorporates all information collected during the sales process to date.

- Pricing isn't discussed during this phase.
- It ensures that you've heard all their challenges and incorporated feedback from your technical discovery.
- You should restate key concerns and talk about the goals of the business and how technology can support their business.
- At this stage you should have a high-level technical discussion including information such as:
 - Remote Access
 - Business Continuity
 - Security
 - Workstations and Servers
 - Cloud
 - Mobility
- Verify the prospect's current budget for technology and technology services. This will help you tailor your proposal to meet their budget.
- Tackle all the challenges and individually address each area of concern and how technology or one of your MSP services can remove these obstacles.
- Whenever possible, use the exact words the prospect used during your first on-site meeting (Step 3). Address each point using the prospect's own words. Example:

"During our meeting you mentioned that your existing technology company is slow to respond to your requests for help. As part of our services, you'll have access to our 24/7 help desk service that, on average, answers calls within three minutes. You will have a real person on the phone that can help you immediately. All calls are logged to ensure details are addressed thoroughly."

- At this time, seek approval for a certain budget range. The prospect may ask what all this will cost. Your job is to offer a ballpark range. Say: "Similar solutions with other clients cost around \$9,000 to \$11,000. Is this range okay?" It should be okay, since you previously asked them what their technology budget is.

- When giving any number, the prospect will always remember the lowest number. Start high and if your number is less, you look like a hero and it also gives you room when negotiations begin.
- It's important during this phase to ask about competitors. Ask the important question: "Have the other IT firms submitted proposals to you?" This is a timing call for you to adjust your agenda to ensure you're the last one to present.
- If the prospect says: "ABC IT has presented theirs and DEF consulting is scheduled for next Tuesday." Your response should be: "Perfect, I need a few more days to digest the notes from this meeting. Can we schedule a time for next Wednesday?"
- This is a critical qualification step and if you feel the prospect hasn't bought into your process you should disqualify them at this time.
- **BEFORE YOU HANG UP THE PHONE – GO TO STEP 12**

Step 12: QUALIFICATION POINT 5 – Introduce Your Managed Services Agreement

Timeline – Day Seven

- While you're reviewing the project overview during Step 9, this is the perfect opportunity to introduce your managed services program and the benefits managed services offers.
- Prospects may assume that your project includes ongoing support. This isn't true in many situations. It's your job to define early in the process that ongoing support occurs after the project is implemented.
- Outline how your offering will benefit their business. Make it about them and not about you.
- It's highly recommended that you have case studies prepared at this time that speak to the value of your managed services program, and how your clients have come to rely on you as their trusted IT and technology support professionals.
- Cover these important facts:
 - Day-to-day IT support
 - After-hours support
 - Help-desk services
 - Remote support
 - Monitoring services
 - Training services
 - Security services
 - Cloud services if any
 - Licenses and subscriptions
 - Any other details about your MSP offering
- Get buy-in now for your support agreement.
- At this point, if you're asked about the price to support their business network, you can use ballpark numbers. It's best to word your response in this manner: "Companies similar to yours pay \$1,000 to \$1,500 monthly."
- It's important to note that the lowest number mentioned is often the one they remember. Plan accordingly.
- If the prospect doesn't want or see value in your ongoing support agreement, you may elect to disqualify them at this stage.
- Step 9 and Step 10 are designed for you to get buy-in for your services without providing any pricing.

- Make sure to hit all the key points mentioned throughout your sales process, especially the initial phone call, onsite meeting and technical discovery.
- Use the prospect's own words at all times.
- Set the expectation of what needs to happen to qualify for managed services. A first month's payment at the acceptance of your offer and/or any standardization work is important to address.

Step 13: MEET WITH YOUR ENTIRE TEAM – Knock Out Your Proposal

It's critical to have your entire team involved in the proposal creation process. Sales Professionals, Sales Engineers and your technical professionals must be included in the research and development of the prospect's proposal.

On a personal note, not having buy-in from your staff can create animosity amongst sales and technical teams. This relationship is one that requires a "kid-glove" treatment due to natural personality differences between sales and technical resources.

Use all the information gathered throughout the sales process, including notes from your meetings and telephone calls, technical discovery, project overviews and any other communications to build your proposal.

Make sure you keep in mind the budget number your prospect gave you at the start of your meeting. This number is not your final number but a number that you must meet annually. Knowing the prospect's annual IT budget will allow you to meet their financial objectives and better your chances at winning the deal.

The annual budget number must be highlighted throughout your proposal. Top sales professionals know creative ways to meet prospect's financial requirements. Leveraging leasing and Hardware As A Service (HaaS) are strategic ways to meet the prospect's financial objectives and also get them the services they require.

When it comes to presenting your proposal whenever possible use the EXACT words the prospect used. Don't confuse them with technical jargon or canned material. Each prospect deserves a custom proposal, especially with big-ticket proposals. Take the time to prepare your proposals, using English language and cover ALL prospect wants, needs and objectives.

When you align your solutions to meet the prospect's needs... the magic happens.

Bind your proposal and print professionally. Don't print on your low-end black and white laser printer. Print your proposal in high-gloss color and include more examples of your recent case studies and project reviews. This increases your credibility.

Call your prospect and book a time for an onsite meeting to present your proposal. Never send a proposal by email.

Step 14: THE PROPOSAL PRESENTATION

At this time, if you followed all the steps in your sales process, the proposal presentation is just a formality and a logical conclusion to a well-thought-out and well-executed sales process.

Do you bring a projector and PowerPoint? No.

This is a meeting between you, your prospect and any influencers.

It's important to bring your sales engineer with you to your proposal meeting. The sales engineer has in-depth knowledge of the technical status of the network, computers and any technology used in the prospect's business.

It's also critically important for you not attend any sales meeting on your own. "Four-legged" sales meetings increase credibility and also allows for questions to be answered when they arise, accelerating the sales process towards its conclusion.

At this point, you've:

- Shown that your managed services business is a force to be reckoned with.
- Proved that you are a low-risk option through your case studies, press releases and project reviews.
- Offered testimonials and names of key clients your prospect can interview.
- Set their minds at ease with your comfort letters, and with one of your best clients stepping up to endorse you.
- Addressed all the prospect's concerns and objectives throughout your process.
- Confirmed everything with your project overview.
- Obtained early buy-in for your managed services program.

Now it's time to ask for their business.

This is the first time you're showing any concrete numbers to your prospect. However, this should not be a major problem. After all, you have approval at this time for a certain budget — your job is to work with this budget.

You'll have to deal with questions, objections and start any negotiations. Don't expect your prospect to accept your proposal, even though they've approved your budget. Savvy business owners will always try to negotiate to get a better deal.

Never leave the meeting without a commitment from your prospect. "I'll get back to you." is not a commitment. If the prospect needs to take your proposal to a committee or others, then shame on you for not getting to the ultimate decision maker. Always ask for the opportunity to come back to meet with the entire team of decision makers.

If the prospect needs time to review your proposal, schedule a follow up meeting to come back to address any questions or objections. However, we don't recommend giving them too much breathing

room. **Always get a commitment to move forward before you leave. After all, at this time, this deal should be yours:**

- You're the last to present and they can compare you to everyone else.
- You've demonstrated that you are little or zero risk.
- It's time to get a commitment to start working and transition your prospect into a client.

Have your client sign all your agreements, including for managed services at this meeting. Secure payment for the first month's managed services. This shouldn't be a problem since you already set up this expectation during your managed services meeting.

Step 15: THE ONBOARDING PROCESS

After your prospect has successfully graduated to a client and has accepted your proposal and managed services agreement, it's time for them to move onto your account management team. This is done with an Onboarding Process.

The Onboarding Process includes you and your account team plus everyone at the client's side who is involved in the day-to-day management of their business. This includes C levels, VP's, Managers and anyone else.

This is a meeting to introduce everyone and start the relationship in the right direction. Some items to discuss in the onboarding meeting include:

- Day-to-day support processes
- After-hours support
- How to submit tickets by email, web portal or phone
- Define who's authorized to submit tickets
- Define the service-level agreement and commitments on both sides
- Training
- Accounting
- Plus more as needed.

At this point, your sales professional should hand off the daily management of the client to your account management team; however they should still maintain a relationship for future sales and remain involved at a high level.

It's also important that you advertise your new-client "win" with a press release on your website and distribution through media channels. It's also a great idea to draft up a press release for the client to announce their selection of your managed services business.

Step 16: THANK YOU

Perhaps the two most important and most neglected words are THANK YOU.

These two small words can have massive impact.

Our recommendation is for your business to thank your client for putting their trust in you as their new managed services provider by making your thank-you gift valued at 1% of the total gross revenue of the annual managed services contract.

If your MSP contract is \$100,000 then your thank-you gift must be \$1,000.00. This is a small token of appreciation. It will get them talking about how great you are with friends, colleagues and business associates.

Step 17: ASK FOR A REFERRAL

No better time to do this since your client is now super happy with the sales and onboarding processes and the level of detail your MSP has shown!

In Conclusion

We know that some of these steps will make you feel uncomfortable. However they've been proven by our own managed services business in Calgary, Canada. By using these 17 Steps, we've built an MSP business with \$5.4 million in revenue, and 34 employees, in just eight years. **THESE STEPS WORK, but you have to follow them.**

IMPORTANT NOTE: Don't agree to take on any new business until all qualification steps have been completed. It's okay to accelerate through the steps after Step 3 is completed if the prospect has immediate needs.

If so, provide them service based on time and materials until they've met your MSP agreement terms. Have them sign a "Time and Materials" Agreement and get a retainer of \$1,000 up front to cover your fees.

Ulistic guarantees that if you follow these 17 Steps as suggested, you'll win more MSP business and GROW to NEW STRATOSPHERIC levels of success.

Call 716.799.1999 ext. 102 to book your no-obligation meeting with Ulistic.

Like ULISTIC on Facebook at <http://www.facebook.com/ulistic>