CHECKLIST

6 Steps to Find, Engage & Get Corporate Clients, CONSISTENTLY

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BUSINESS ACADEMY

INTRODUCTION: B2B Sales

These six steps are the exact process I use in the B2B side of my business – and that I share with my 1:1 clients, which has served us very well. It's a proven shortcut to get corporate clients or other organisational contracts – even if you're just starting out of the gate.

If you want to get corporate clients, your prospect is not the participant, it's their employer, the organization.

And that's what this guide will help you line up – in six steps.

The six steps are all mutually reinforcing, each underpins and strengthens the next stage and ensure you will streamline your efforts and have a greater chance of success. They all begin with a P, so easy to remember!

1. Positioning
2. Pipeline
3. Prospecting
4. Proposals
5. Presentations (or pitches)
6. Persistence (and follow up).

Let's dive in!

STEP #1 – POSITIONING

How are you being unique in the marketplace?

- ☐ Always act with integrity and authenticity
- ☐ Differentiate yourself so you stand out
- ☐ Don't just show up as a commodity service
- ☐ Offer tangible outcomes/benefits that your competitors don't

One thing consultants and coaches forget, all too often:

Your client list makes you unique!

STEP #2 – PIPELINE

Are you doing due diligence on your target companies?

- ☐ Draw up a profile of your ideal B2B client
- ☐ List organizations you want to get as a corporate client
- ☐ Do your research on the key roles relevant to what you do
- ☐ Create a pipeline using a simple spreadsheet to rank/priorities reaching out
- ☐ Search for connections in those organizations and roles on LinkedIn
- ☐ Find out who are the decision makers in the area of what you provide (who may not be the first person you contacted or spoke with)

One thing you can start doing right away:

Proactively plan, prioritize and manage your pipeline outreach

STEP #3 – PROSPECTING

How are you getting in front of the decision makers?

- ☐ Send a personal email to your contact and make it mutually beneficial to connect
- ☐ Mention something relevant in the news or that they posted on LinkedIn
- ☐ Ask to speak and find out or interview them for a study you're doing
- ☐ Share good thought leadership pieces to position you as credible authority
- ☐ Offer a free 'white paper' or 'research report' to get them to contact you

One thing you want to achieve, ultimately:

Be the hunted, not the hunter.

STEP #4 – PROPOSAL

How are you preparing and tailoring your proposal to the specific organization?

- ☐ Ask what format they need from you or if they want you to use their template
- ☐ Make clear how your proposal meets what they need, by when
- ☐ Emphasise benefits, outcomes and impact over methodology and team info
- ☐ Offer at least two price options or phases of work
- ☐ Don't just write a CV and list of qualifications
- ☐ Leave detailed scope and legal T&Cs until the letter of engagement/formal contract
- ☐ Include a cover letter and state when and how you'll follow up

One thing to remember at this stage:

You want a decision in principle, you don't need every detail pinned down

STEP #5 – PRESENTATION (or PITCH)

Are you taking opportunities to present your proposal or offer in spoken form?

- ☐ Demonstrate you understand their market and risk environments
- ☐ Talk about high-level objectives that drives decisions strategically within an organization
- ☐ Consider the likely stakeholder interests and include all perspectives
- ☐ Think about when your ideal client organizations typically need your services
- ☐ Identify budget cycles and timeframes for collaborative work you do with them
- ☐ Identify timeframes for carry-over funding
- ☐ Ask specific questions so you get back specific answers

One thing consultants and coaches overlook:

A presentation or pitch can be re-used in any speaking engagement

STEP #6 – PERSISTENCE ☺

How are you moving on from a 'no'?

- ☐ Always ask for feedback to understand your proposal's strengths and weaknesses
- ☐ Reframe or pivot the offer to keep it uber-relevant and compelling
- ☐ Be persistent with follow up communications that add value
- ☐ Know when to stop so you don't become a pest

One thing you may be doing wrong:

You can't start with a product and then try to figure out how to sell it.

The #7 DIMENSION – PARTNERSHIPS

Here's where you have an opportunity to create a proposal that brings in more than just yourself. If you're a sole trader, you may not think to do this, but it's how you can accommodate a bigger scope or a short timeframe to deliver if you're already maxed out yourself.

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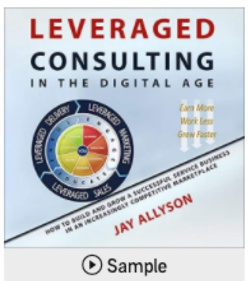

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