# GabeDA Complete Meeting Preparation Summary

## Your Quick-Start Guide to Client Meetings

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## OVERVIEW: WHAT YOU NOW HAVE

You have created a comprehensive meeting preparation package containing:

1. **Main Meeting Preparation Pack** - Complete scripts, agendas, objection handling
2. **Sample Analysis Report** - Template for what clients will receive
3. **Data Processing Agreement** - Legal foundation for data handling
4. **Quick Reference Card** - Pocket guide for every meeting
5. **Launch Checklist** - Step-by-step action plan for first 30 days
6. **Pricing Guide** - How to price and justify value
7. **Email Templates** - Ready-to-use communications
8. **Client Intake Questionnaire** - Understanding each client deeply

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## THE GABEDA SALES PROCESS (OVERVIEW)

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STAGE 1: OUTREACH
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STAGE 2: FIRST MEETING (Discovery + Demo)
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STAGE 3: FOLLOW-UP & PROPOSAL
↓
STAGE 4: CLOSING
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STAGE 5: ONBOARDING
↓
STAGE 6: SERVICE DELIVERY
↓
STAGE 7: RETENTION & REFERRALS
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## STAGE 1: OUTREACH

### Goal

Book 5-10 initial meetings per week

### Actions

- [x] Identify 30 target businesses (Launch Checklist)
- [x] Prioritize: Warm leads → Cold leads
- [x] Use email templates for outreach

- [x] Walk-ins for retail/restaurants
- [x] LinkedIn for professional services

### Key Metrics

- Contacts made: ___
- Responses received: ___
- Meetings booked: ___
- Conversion rate: ___%

### Success Tips

- Personalize every message
- Lead with value, not features
- Make booking easy (calendar link)
- Follow up 2-3 times if no response

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## STAGE 2: FIRST MEETING

### Goal

Understand their needs, demonstrate value, determine fit

### Before Meeting (24 hours prior)

- [ ] Research business (15 min)
- [ ] Prepare 3 relevant industry examples
- [ ] Print materials: one-pager (2x), sample report, business cards
- [ ] Charge laptop/tablet
- [ ] Review Quick Reference Card
- [ ] Confirm meeting time/location

### Meeting Structure (45-60 min)

**Opening (5 min)**

- Build rapport
- Set agenda
- Ask permission to ask questions

**Discovery (20 min)**
*Key questions from Meeting Prep Pack:*

- How do you make decisions today?
- What systems do you use?
- What's your biggest frustration?
- What would you like to know that you don't?

**Presentation (15 min)**

- Show sample report (relevant to their industry)

- Walk through specific insights
- Explain process
- State pricing clearly

**Objection Handling (10 min)**

- Address concerns (use Quick Reference Card)
- Price objection? Use Pricing Guide responses
- Privacy concern? Emphasize data security
- Skepticism? Offer pilot

**Closing (5-10 min)**

- Hot lead: Schedule next step NOW
- Warm lead: Send proposal + follow-up date
- Cold lead: Thank them + permission to follow up

### Materials to Bring

- One-pager (2 copies)
- Sample report (1 copy)
- Business cards (5)
- Notebook
- Laptop/tablet
- Quick Reference Card in pocket

### After Meeting (within 24h)

- [ ] Write notes while fresh
- [ ] Send follow-up email (use template)
- [ ] Attach promised materials
- [ ] Propose specific next step
- [ ] Update CRM/tracking

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## STAGE 3: FOLLOW-UP & PROPOSAL

### Goal

Move warm leads to hot, convert hot leads to clients

### Follow-Up Timeline

**Day 1 (within 24h):**

- Send thank you + materials email
- Reference specific conversation points
- Attach: one-pager, sample report, data agreement

**Day 3-7:**

- Check if they reviewed materials

- Answer any questions
- Offer to prepare custom insight examples

**Day 7-14:**

- For hot leads: "Ready to move forward?"
- For warm leads: Share additional value (case study, tip)
- For cold leads: "Any questions I can answer?"

**Week 3-4:**

- Final push for hot/warm leads
- "This week works, or should I follow up later?"

### Proposal Components (use templates)

- Service overview
- Deliverables
- Process & timeline
- Pricing
- Privacy/security details
- Next steps

### Success Tips

- Be persistent but not pushy
- Add value in every follow-up
- Make next step crystal clear
- Use scarcity carefully ("limited capacity")

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## STAGE 4: CLOSING

### Goal

Convert proposals to signed clients

### Common Last-Minute Objections

**"I need to think about it"** → "What specifically do you need to evaluate?" → Offer: Prepare custom insight examples

**"Can we start next month?"** → "Sure. Let me book you now for [specific date]" → Or: "Any reason we can't start sooner?"

**"What if it doesn't work?"** → "No long-term contract - cancel anytime" → Or: Offer pilot (CLP 120k, one-time)

**"I need to discuss with [partner/accountant]"** → "Of course. Can I send them information?" → "Would a 3-way call help?"

### Closing Techniques

**Assumptive Close:** "Great! Next step is to sign the data agreement and schedule your onboarding call. Does Monday or Wednesday work better?"

**Alternative Choice:** "Would you prefer to start with a pilot analysis or go straight to monthly service?"

**Urgency (Use carefully):** "I only have capacity for 10 clients right now. If you want to start this month, we should lock it in this week."

### Documents to Sign

- Data Processing Agreement (both parties)
- First invoice
- Onboarding scheduled

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## STAGE 5: ONBOARDING

### Goal

Set client up for success, establish processes

### Onboarding Checklist

**Day 1: Welcome Email**

- Use template from Email Templates doc
- Confirm payment details
- Schedule onboarding call

**Week 1: Onboarding Call (30 min)**

- Review data agreement
- Show how to export data
- Confirm analysis priorities
- Answer questions
- Set expectations

**Send Client Intake Questionnaire**

- Can discuss during call or send after
- Critical for understanding business

**Week 1-4: First Analysis**

- Client sends data
- You analyze deeply
- Create amazing first report
- Deliver + consultation call

### Set Regular Schedule

- Data request: 1st of month
- Data received: by 5th

- Analysis: 6th-20th
- Report delivery: 25th
- Consultation call: 28th

### First Month is Critical

- Over-deliver
- Be responsive
- Find surprising insights
- Prove value immediately

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## STAGE 6: SERVICE DELIVERY

### Goal

Deliver consistent value, exceed expectations

### Monthly Cycle

**Week 1:**

- Request data (use email template)
- Receive and validate data
- Ask clarifying questions

**Week 2-3:**

- Deep analysis
- Find 3-5 meaningful insights
- Create professional report
- Prepare recommendations

**Week 4:**

- Deliver report (use email template)
- Schedule consultation call
- 30-min discussion
- Answer questions
- Delete raw data (7 days max)

### Best Practices

**Analysis Quality:**

- Always find something surprising
- Make insights specific and actionable
- Prioritize recommendations
- Show trends over time (month 2+)

**Communication:**

- Respond to emails <24h
- Be available between reports
- Check in mid-month
- Ask for feedback

**Relationship Building:**

- Remember personal details
- Celebrate their wins
- Be honest about limitations
- Position yourself as partner, not vendor

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# STAGE 7: RETENTION & REFERRALS

## Goal

Keep clients long-term, grow through referrals

## Retention Strategies

**Month 3:**

- Check in: "How's it going?"
- Ask: "What would make this even more useful?"
- Adjust based on feedback

**Month 6:**

- Request testimonial
- Offer incentive for referral
- Consider: "What else could we analyze?"

**Month 12:**

- Annual review: Wins from the year
- Discuss: Expanding scope or services
- Thank them for partnership

## Warning Signs (Address Immediately)

- Late payments (2+ times)
- Not implementing recommendations
- Short/disengaged in calls
- Negative feedback
- Reduced communication

**Action:** Proactive conversation "I've noticed [X]. Is everything okay? How can I improve?"

## Asking for Referrals

**When:**

- After 3+ months of good service
- After they implement a win
- After positive feedback

**How:** "I'm glad GabeDA has been useful! Do you know another business owner in Villarrica who might benefit from this?"

**Incentive:**

- 1 month free for each referral who becomes client
- Or CLP 100k cash
- Or 20% discount for 6 months

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## KEY SUCCESS FACTORS

### 1. Quality Over Quantity

Better 5 great clients than 15 mediocre ones

### 2. Focus on Value

Every interaction should add value

### 3. Be Honest

Admit limitations, don't overpromise

### 4. Listen More Than Talk

Their problems > Your solutions (at first)

### 5. Document Everything

CRM, notes, learnings

### 6. Iterate Quickly

Learn from each meeting, adjust approach

### 7. Build Reputation

Villarrica is small - reputation is everything

### 8. Stay Confident

You have 10 years expertise - own it

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## COMMON PITFALLS TO AVOID

### ❌ Don't:

- Discount too heavily too fast
- Take clients you know you can't help
- Ignore red flags (late payers, unrealistic expectations)
- Forget to follow up
- Neglect existing clients for new prospects
- Get defensive with objections
- Undervalue your expertise

✅ Do:

- Charge what you're worth
- Be selective about clients
- Set clear boundaries
- Follow up consistently
- Prioritize client success
- Learn from objections
- Believe in your value

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## YOUR FIRST WEEK ACTION PLAN

### Monday

- [ ] Print all materials (50 one-pagers, 20 sample reports, 100 business cards)
- [ ] Practice pitch 5 times
- [ ] Identify 30 target businesses

### Tuesday

- [ ] Contact 10 warm leads
- [ ] Walk downtown, note businesses
- [ ] Set up calendar/CRM system

### Wednesday

- [ ] Send 10 cold emails
- [ ] Do 5 walk-ins
- [ ] Follow up on warm leads

### Thursday

- [ ] First meetings (goal: 2-3)
- [ ] Send follow-ups
- [ ] Contact 5 more prospects

### Friday

- [ ] More meetings
- [ ] Follow up all week's contacts
- [ ] Review what's working/not working

### Weekend

- [ ] Prepare for next week
- [ ] Update materials based on learnings
- [ ] Plan next 10 contacts

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## METRICS TO TRACK WEEKLY

### Activity Metrics

- Contacts made: ___
- Meetings booked: ___
- Meetings completed: ___
- Proposals sent: ___

### Conversion Metrics

- Contact → Meeting: ___%
- Meeting → Proposal: ___%
- Proposal → Client: ___%
- Overall conversion: ___%

### Pipeline Metrics

- Hot leads: ___
- Warm leads: ___
- Proposals pending: ___
- Expected MRR: CLP ___

### Learning Metrics

- Most common objection: ___
- Best-performing pitch point: ___
- Most receptive industry: ___
- Average time to close: ___ days

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## RESOURCES QUICK REFERENCE

**For Meeting Prep:** → Main Meeting Preparation Pack → Quick Reference Card (print & carry)

**For Outreach:** → Email Templates (all scenarios) → Launch Checklist (target identification)

**For Pricing Conversations:** → Pricing Guide (value calculator, objection handling)

**For New Clients:** → Data Processing Agreement → Client Intake Questionnaire → Onboarding email templates

**For Ongoing Service:** → Sample Report Template → Monthly communication templates

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# FINAL REMINDERS

## You Are Ready

- 10 years at Experian
- Deep expertise in analytics
- Clear value proposition
- Complete meeting preparation
- Chilean PYMEs need you

## First Client is Hardest

- After that, it gets easier
- You'll have case studies
- You'll have refined pitch
- You'll have confidence

## Success Timeline

- Week 1-2: Learning, adjusting
- Week 3-4: First client (goal)
- Month 2: 2-3 clients
- Month 3: 3-5 clients
- Month 6: 5-8 clients
- Month 12: 10+ clients, sustainable business

## When You Feel Stuck

1. Review your "why"
2. Look at your expertise
3. Remember: You're solving real problems
4. Reach out to your support network
5. Adjust approach based on feedback
6. Keep going - consistency wins

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# YOU'VE GOT THIS! 🚀

Everything you need is in these documents:

- What to say
- How to handle objections
- How to price
- How to follow up
- How to deliver

Now it's time to **EXECUTE**.

Villarrica's PYMEs are making decisions without data.
You can change that.

One business at a time.
Starting today.

**First action: Print Quick Reference Card. Put it in your pocket. Make your first 3 contacts.**

**¡Vamos!** 💪

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*"The best time to start was yesterday. The second best time is now."*