Prime Technical Services

Prospecting & Sales Playbook (Transcribed from Field Guide)

PROSPECTING

Prospecting is the most important part of your job as an account manager. Great account managers never stop prospecting. This is your main business development generator and should be done every week. Being in tune with what is happening in the market will build your credibility, allow you to leverage relationships, and create new business. We want to be everywhere that our competitors are. If our competition is working on a req that we don't have, it's your goal to get that business.

WHY?

If a client is working with our competition, they have open business that is already approved to be filled by a third party such as ourselves. That is money sitting on the table for us to take.\ **The hard work is already done – we just need to deliver and fast.**

DIFFERENT WAYS TO PROSPECT

Spending your day in a LinkedIn or CareerShift rabbit hole is not a good use of your time. Mindlessly calling through 200+ leads who may or may not be hiring is also not the best use of your time. Your lead sheet should be filled with manager names that you KNOW are USERS. There are numerous different avenues to hunt down business, but we want your attack to be as targeted as possible. Below are the three main prospecting tactics to keep you on track:

1. Talking to contractors and getting leads
2. Gathering references/referrals from your candidates
3. From our competitors' websites

INFORMATION WE NEED TO GET WHEN PROSPECTING

As mentioned before, prospecting should turn into the most targeted cold calls possible. The only way we can make that happen is by gathering information. When you're talking to candidates in the market, we want to understand the following information as much as possible. This information is directly translated into a req intake.

1. What are the skillsets being used?
2. Where is this located? Onsite or remote?
3. What is the size of the team?
4. How much are they making hourly/salary?
5. What was the interview process?
6. Why was this role open?
7. Why does the candidate want to leave?
8. (GOV) What is the clearance? Program? End customer?

PROSPECTING

WHAT TO LOOK FOR ON RESUMES

1. Are they on a contract / contract to hire / temporary project?
2. Did they go through one of our competitors?
3. Have they mentioned any programs/business units in their resume to help us identify info?

EXAMPLE RESUME WITH POTENTIAL LEADS:\ Lockheed Martin (Contract through Apex) – July 2022 - December 2022\ **Systems Administrator**

- Set up and configured computers with software for the U.S. Marine Corps mission.
- Maintaining users & computers on the U.S. Marine Corps domain using Active Directory.

How to Screen Candidates When Prospecting:

The more we can get these candidates talking about their job experience, the better. We're trying to gather as much intel as possible about their position/team despite not having a specific requisition we're calling about. The best way to go about this is by framing all of our questions with the intent to find them the perfect position in the future! Every candidate you speak with will have their profile added and updated in Bullhorn.

INTRODUCTION:

Your introduction when calling candidates to pull leads will be very similar to when you're calling to screen them for a specific position.

- Reframe your intro to be centered around networking. We want to connect with them for future roles with (x,y,z) customers because they frequently hire candidates with their background!
- **WHY:** We need to establish credibility with these candidates in order for them to open up about their current work. Network and build a rapport with them and reference the numerous roles we have open - do not mislead them with a fake job opening.

SKILLSET:

This information can be applied to future positions for them but also, these are the details we would be getting on a req intake.

- Dig in on what they're currently doing on their team. What are their main job functions? What tools/ technologies are they using?
- **WHY:** We want to identify which skill sets are being placed by our competition AND put accurate data in Bullhorn.

PROGRAM/TEAM:

We are gathering this information about the program/team and informing the candidate that this is to better understand what they may prefer in their next job.

- What line of business do they fall under (ex: development, testing, networking)?
- How many people are on their team?
- Location? Remote/onsite?
- Clearance (for government)?
- **WHY:** We need to understand the team size, environment, how they were brought on, and more importantly why they were brought on.

COMPENSATION:

We need to figure out the general pay range so we can accurately provide a bill rate to the customer. You're not asking any differently than you would on a prescreen.

- How much are you currently making?
- **WHY:** When we call the manager, we can now sell the correct caliber of candidates and know what they're usually looking to "buy." You have to have the right product and price to make a sale!

THE SALES PROCESS

COLD CALLING

GOAL: Set the Meeting

- ID Spec Accounts
- Build Out a Call Sheet
- Repetition is Key
- Are you Calling the Right People?
- Do You Have Cell Phone Numbers?
- Manage Your Time

FIRST MEETING

GOAL: Discovery / Relationship development

- Intro to Prime
- Understand What They Do
- Identify Opportunities
- Do They Use Our Services?
- Set the Follow-Up
- Get Referrals
- RTB / RTP

SECOND MEETING

GOAL: Add Value

- Clarify Anything You Missed
- Get their Business Update and Forecast for Hiring
- Set the Follow-Up
- Ask for Reqs
- RTB / RTP

LUNCH / COFFEE

GOAL: Build the Relationship

- Solidify the Relationship
- Make Yourself Memorable
- 80% Personal and 20% Business
- How Much Do You Know About Them?
- How Much Do They Know About You?
- RTB / RTP

LUNCH / HAPPY HOUR / DINNER / OTHER

GOAL: Build the Relationship

- 80% Personal and 20% Business
- Invite Them Alongside Other Team Members
- Business Update
- RTB / RTP

THIRD MEETING

GOAL: Fill in the Gaps

- Business Update
- Forecast for Hiring
- Tie-Ins That Are Mutually Beneficial
- Relationship
- Ask for Reqs
- RTB / RTP

COLD CALLING STRATEGY

Don't let your cold call sound like a sales call. Sales calls sound scripted, and it sounds like a longer call is coming. Your cold call should sound like a short call for a very specific purpose. Try and make your call sound as natural, casual, and relaxed as possible.\ **Be confident. Remember: it's not always what you say, but how you say it.**

A FEW THINGS TO REMEMBER WITH YOUR COLD CALL:

- Don’t call 100 people one time, call 40 people 4 times.
- Repetition is key (reps focused).
- Pick a plan and go to work with it.\
- We’re calling people to work with in the future.
- Work life: Real job titles help. Have examples of companies in similar industries or other local/nearby work we’re approved to support.

The Cold Call – Keep It Simple

You don’t sell anything on a cold call. The goal is to get the meeting. Learn your cold call by thinking about what YOU want to say.

Here Are Some Ideas:

1. Say who you are: "Hey, it’s Brandon Blane with Prime Tech."
2. State what you do: "We’re a veteran-owned business specializing in IT contracting services."
3. Say why you’re calling: "We’re working with X, Y, Z and just want to connect."
4. Ask for something: "Any specific times that work for you? Would you have time around 2:00 p.m. on Thursday to connect for 10 minutes?"

Cold Call Rebuttal Reasoning

Most people you cold call don’t want to meet with you. Here’s what their rebuttals are telling you and how to respond:

- "Why Are You Calling?" → You need to improve your introduction. Be more clear on who you are, what we do, and why we want to meet with them.
- "Not Hiring Manager / Not in Charge / Not the Right Person" → Make sure you're focusing on setting the meeting. Disqualify people not tied to the type of roles you're supporting (engineers, test leads, etc.).
- "Are You Approved?" / "Talk to HR" → If we’re approved: remind them we already have a relationship. If we’re not approved: position it as vendor-agnostic and ask for the introduction to HR/procurement proactively.

CLIENT MEETING STRATEGY

PRE-MEETING PLAN

1. Understand what the company does.
2. Do we work with any of their competitors?
3. What are their past performance metrics? Use Bullhorn.
4. What is the manager's job title?
5. First meeting or follow-up?
6. Refresh your notes and load credibility ammo.

RUNNING THE MEETING

1. **Small Talk** – Build rapport. Break the ice, set tone.
2. **Intro** – Prime Tech story. Service offerings.
3. **Agenda** – Why you set this meeting. Outline goals.
4. **Understand What They Do** – Zoom in on company/org. Mission.
5. **Organization Breakdown** – Team size, structure, how they bring people on, etc.
6. **Identify Opportunities** – Pain points, gaps, project goals.
7. **Next Steps** – Referrals, follow-up reqs, thank them.

HOW TO: MEETING OUTLINE

- **Start with small talk but read the room** – some managers want to get straight to business.
- **PRE-MEETING PLAN INFO:**
- What do we know? Who do they work with?
- What approvals do we have and which competitors staff similar roles?
- **GIVE YOUR MEETING INTRO:**
- Who we are. Prime story. Purpose of the meeting agenda.
- **ORGANIZATION BREAKDOWN:**
- Team size, responsibilities, current tools/technologies, contractors vs full-time.
- **HOW DO THEY BRING PEOPLE ON:**
- Internal referrals, feedback loops, userbuy-in, req formation.
- **CURRENT / UPCOMING NEEDS**
- **REFERRALS**
- **NEXT STEPS:**
- Book next step. Calendar follow-up. Meeting loop closure.

End of Sales Prospecting Playbook.

Let me know if you'd like a downloadable PDF version or visual slides next.