



connected
platforms

Sales Process Playbook





Our Focus

To drive technology success for our Connectees.
Amazing Solutions, Stable Platforms, Enhanced Security.

10 Year Target™

Connected culture that provides stability, security and support for 20,000 Connectees.

Core Values

1 **We are Connected:**
To each other and our Connectees.

2 **Happy to Help:**
Service with a smile, nothing is a burden.

3 **We Solve Problems:**
It's what we do.

4 **Future Focused:**
Solutions for now and the future.

5 **Growing Together:**
Elevate ourselves and others for a greater future.



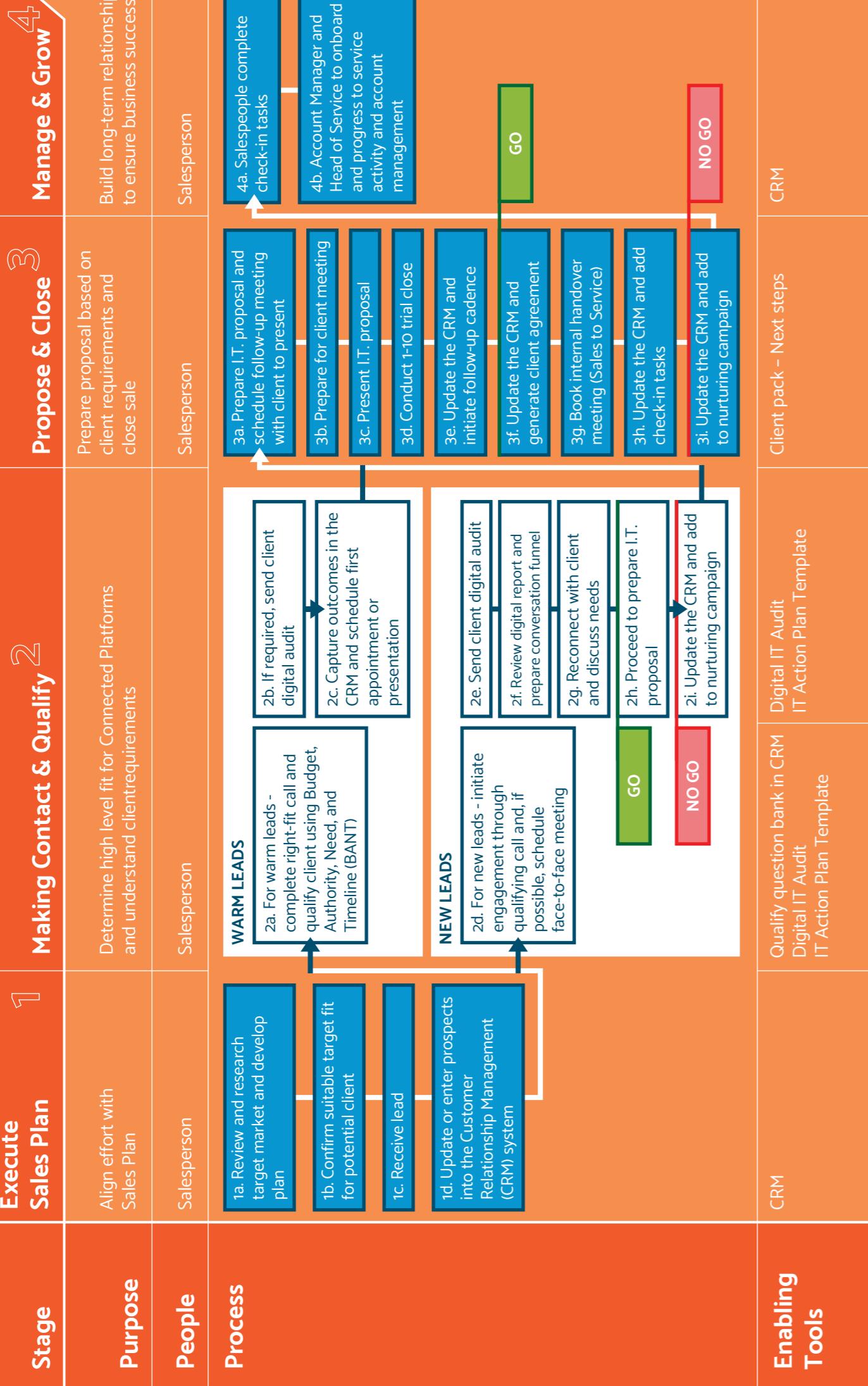
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Sales Process Wheel





Introduction

Purpose

The purpose of this playbook is to provide you, our sales people, with a sales process to follow. This process will provide greater consistency and a standard to follow across our team and improve the overall Client Experience.

Scope

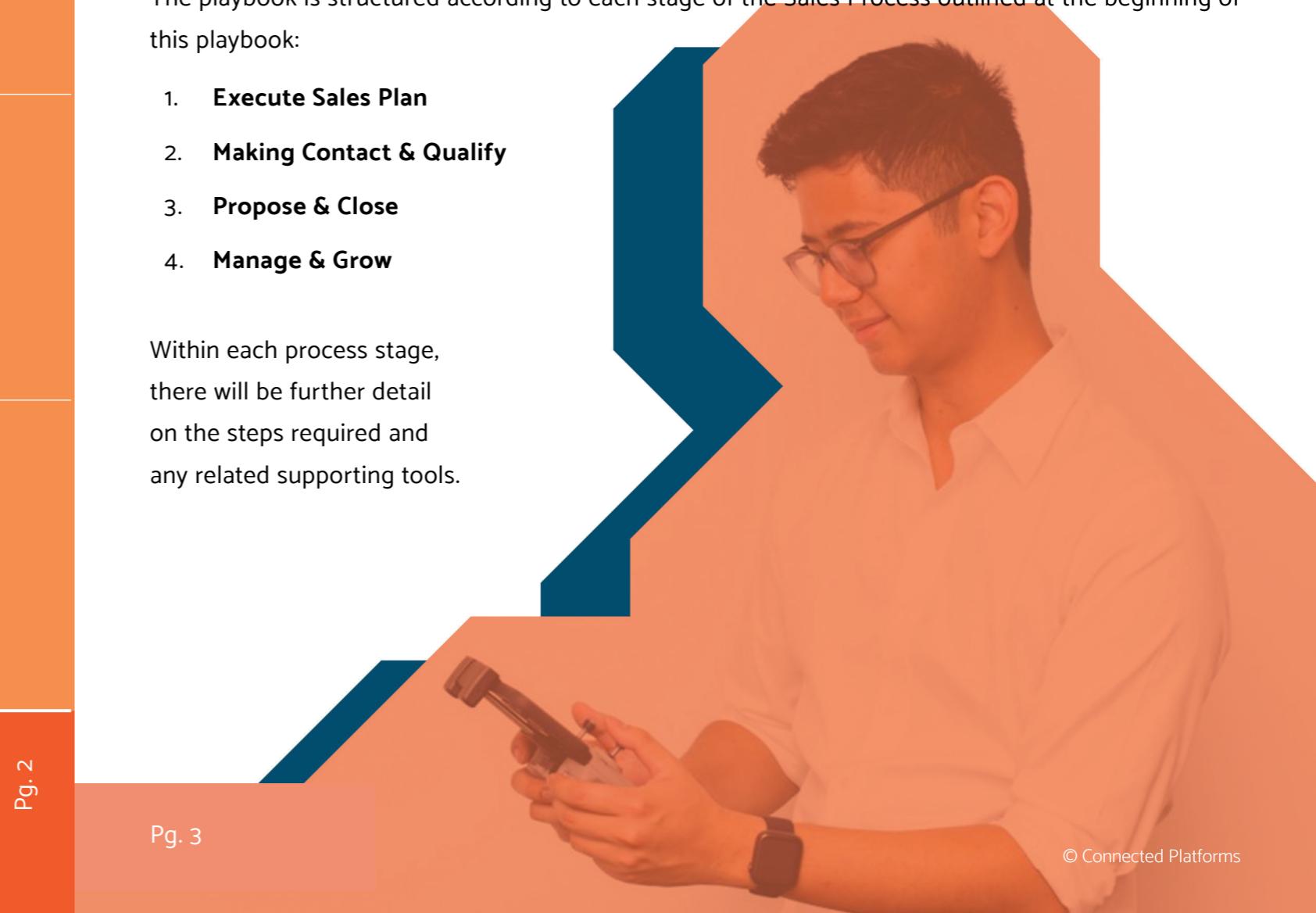
This Sales Process Playbook is designed to provide our sales people with the required understanding of our sales process. It is intended to focus on the process rather than providing details on each of the products.

Structure of this Playbook

The playbook is structured according to each stage of the Sales Process outlined at the beginning of this playbook:

1. **Execute Sales Plan**
2. **Making Contact & Qualify**
3. **Propose & Close**
4. **Manage & Grow**

Within each process stage, there will be further detail on the steps required and any related supporting tools.





✿ Roles and Responsibilities

This playbook outlines the sales cycle with respect to the key sales roles. Team members outside these roles do however have identified tasks that relate to the Sales Process, and these actions are included within the playbook. Any additional steps required by these roles to complete the identified tasks have not been detailed here.

The key sales roles outlined within this booklet are:

BDM Business Development Manager	Serves as the primary point of contact for existing clients, delivering strategic advice and technical knowledge to identify hardware and project sales opportunities whilst functioning as virtual CIOs during meetings. They provide customised guidance through complex technology landscapes, acting as trusted advisors and escalation points for technical issues, all whilst maintaining strong relationships that reduce churn and support company growth.
TAM Technical Account Manager	Maintains and grows sales through effective management of existing customers and active pursuit of new ones. Responsibilities include building relationships with wholesale and direct customers, increasing business with existing clients, identifying new opportunities, achieving sales targets, providing customer training, introducing new products, handling complaints, monitoring market trends, preparing account plans, and collaborating with company directors to develop growth strategies.

Digital IT Audit

Click Me!



Stage 1: Execute Sales Plan

Overview

Stage 1 establishes the strategic groundwork for finding and engaging with businesses that require, and could significantly benefit from, trusted I.T. services. Connected Platforms prides itself on being a personal and professional, managed services provider who aims to protect our clients' I.T. systems, maintain smooth operations, increase productivity and reduce downtime. By carefully researching potential sectors and validating each lead (a critical step) we can focus on organisations that appear to stand to gain the most from our approach—ultimately enhancing their efficiency and productivity through smart, reliable I.T. support.



Remember

ANY and ALL leads must go into the CRM.





Stage 1: Execute Sales Plan

Roles

These steps relate to the **BDM** (Business Development Manager) and **RAM** (Regional Account Manager) Roles.

Steps

1a. Review and research target market and develop plan

1b. Confirm suitable target fit for potential client

1c. Receive lead

1d. Update or enter prospects into the Customer Relationship Management (CRM) system



Stage 1: Execute Sales Plan

1a. Review and research target market and develop plan

In this essential first step, your focus is to delineate which businesses represent the most suitable fit for Connected Platforms.

We partner with organisations by identifying those businesses that fit our Go To Market Strategy:

- **Ideal Seat Size:** 40-60 Users
- **Target Industries:** Professional Services, Financial Services, Business Advisory Services & Not for Profits
- **Target Culture:** Growth Mindset, Willing to Change, Platform Alignment & Committed to Connect



Note

Some referrals may sit outside of this strategy but may be worthy of consideration. If you are unsure speak to the Leadership Team.





In a rapidly evolving digital landscape, I.T. support has become the backbone of successful businesses. When researching potential clients, in addition to the business' alignment with our 'Go To Market Strategy (see above), you need to consider the following to effectively assess their suitability:

▫ **Industry Specific Requirements:** Analysis of their industry needs:

- Are they in an industry sector where maintaining robust, secure I.T. systems are of vital importance? For example, professional services, healthcare or manufacturing.

▫ **Market Analysis Criteria:** Assess their suitability:

1. Current I.T. Setup - Do they currently lack formal I.T. support, utilise an in-house team, or engage an outsourced provider?
2. Growth Potential - Are they currently expanding operations, opening new locations, or have they recently secured funding?
3. Common Pain Points - Consider potential system reliability issues, security vulnerabilities, or stringent compliance requirements they may face.

Utilise tools such as LinkedIn Sales Navigator, industry databases, and your professional network to compile a list of potential targets. Pay particular attention to businesses that emphasise technology driven operations or have indicated a need for enhanced security, backup, or disaster recovery solutions.

Three Uniques

1

True predictable support costs

2

Your team Connected to our team

3

We help stop issues before they occur



1b. Confirm suitable target fit for potential client

Once your initial prospect list is compiled, determine whether each organisation genuinely aligns with Connected Platforms' service offerings. This is important to ensure your time is dedicated to pursuing leads that can truly benefit from our approach as a leading managed services provider.

Key validation criteria include:

- **Technical Requirements:** Do they require proactive I.T. management, remote support, or advanced security solutions that Connected Platforms is equipped to provide?
- **Geographic Feasibility:** Are they located within our core service region? Do their needs necessitate on-site visits, or is remote support likely to be sufficient?
- **Complexity of Needs:** Assess their existing technology stack and level of sophistication. Consider whether our services can effectively reduce their downtime, increase productivity, and address any compliance requirements they may have.

Document your findings meticulously in the CRM to establish a reliable and useful knowledge base of qualified prospects.



1c. Receive lead

Leads may originate from various sources, including:

- The Connected Platforms website
- telephone enquiries
- referrals.

Tailor your response according to the lead source.

- **Direct Enquiries:** These typically originate from our website forms or phone lines. Responses should be provided within agreed response time standards.
- **Referral Leads:** Thank the referrer promptly, record all pertinent referral details in the CRM or tracking system, and note any specific requirements mentioned.
- **Marketing-Qualified Leads (MQLs):** These may be generated through social media campaigns, email marketing initiatives, or events. Review their engagement history (e.g., resource downloads, webinar attendance) to ascertain which aspects of Connected Platforms' services initially attracted their interest.



1d. Update or enter prospects into the Customer Relationship Management (CRM) system

Maintaining accurate records facilitates seamless collaboration across the Connected Platforms team. When adding a new prospect to your CRM system, ensure you capture:

1. Contact Details: Business name, ABN, main contact person, direct telephone/email, and address.
2. Business Profile: Industry, size, current I.T. setup, and decision-making structure.
3. Engagement History: Lead source, initial contact date, preferred communication methods, and any relevant interactions or observations to date.

When entering data into the CRM ensure that you:

- Tag or categorise prospects consistently using a clear and well-defined classification system.
- Establish follow-up tasks to maintain proactive engagement.
- Keep data current by reviewing entries on a daily basis, thereby ensuring no prospects are overlooked.



Note: ‘Garbage in, garbage out’ (GIGO)

Poor quality data input into the CRM will lead to flawed outputs and decisions.





Stage 2: Make Contact & Qualify

Overview

Stage 2 is focused on initiating meaningful conversations with prospects, whether they are warm leads or new introductions. Connected Platforms emphasises a personal approach—attentive listening, identification of technological challenges, and the provision of valuable insights. By thoroughly qualifying each lead and performing a detailed digital audit where appropriate, we can effectively demonstrate our capacity to protect and optimise their I.T. environment.



Roles

These steps relate to the

BDM (Business Development Manager) and

RAM (Regional Account Manager) Roles.

Steps

WARM LEADS

2a. For warm leads - complete right-fit call and qualify client using Budget, Authority, Need, and Timeline (BANT)

2b. If required, send client digital audit

2c. Capture outcomes in the CRM and schedule first appointment or presentation

NEW LEADS

2d. For new leads - initiate engagement through qualifying call and, if possible, schedule face-to-face meeting

2e. Send client digital audit

2f. Review digital report and prepare conversation funnel

2g. Reconnect with client and discuss needs

GO

2h. Proceed to prepare I.T. proposal

NO GO

2i. Update the CRM and add to nurturing campaign



WARM LEADS

2a. For warm leads - complete right-fit call and qualify client using Budget, Authority, Need, and Timeline (BANT)

When engaging a warm lead (e.g., a referral or an individual who has expressed prior interest), commence with a personalised introduction. Demonstrate genuine interest in their business:

"Thank you for considering Connected Platforms. We specialise in managed I.T. solutions for businesses. Could you perhaps provide some information regarding your current I.T. environment and any key issues you are presently experiencing?"

It is vital to qualify all sales opportunities before we expend any significant effort on Client enquiries.

At Connected Platforms, we have adopted the BANT technique to assist with qualification.

Budget	How much is a prospect willing and able to spend on a solution like yours?
Authority	Does your contact have decision making power – and if not, who does?
Need	Does your prospect's business actually have a problem your business can solve?
Timing	How much time does your prospect need to make a purchasing decision?

B
A

N
T

Salespeople frequently miss their sales targets for almost always the same reason - they have spent too much time on opportunities that didn't close. Good qualification reduces this likelihood.

The following details examine each qualifier, with examples of questions you may be able to ask the prospect.

To see a detailed breakdown of BANT and how to properly implement it, refer to the Appendix at the end of this playbook.



2b. If required, send client digital audit

Following confirmation of a potential fit, you can offer the digital audit. Present it as a complimentary assessment designed to pinpoint areas for potential improvement:

- ⌚ **Security** – Are there potential vulnerabilities within their networks, such as unpatched software or suboptimal firewall configurations?
- ⌚ **System Performance** – Could suboptimal speeds or ageing hardware be negatively impacting productivity?
- ⌚ **Backup & Recovery** – How robust is their business continuity plan in the event of unforeseen incidents?

Provide the client with a link or file for the audit, clearly explaining how the results will inform our subsequent recommendations.





2c. Capture outcomes in the CRM and schedule first appointment or presentation

Upon offering the digital audit (or following the initial call), organise and record essential details within your CRM system:

- ❖ **Key Contacts** – Who are the individuals involved in I.T. decision-making processes?
- ❖ **Technology Snapshot** – Summarise their infrastructure based on your current understanding.
- ❖ **Pain Points** – Document any immediate issues they have mentioned, such as downtime incidents or security gaps.

Schedule a more detailed appointment or presentation. This may be conducted in person, if geographically feasible, or via digital conference. Confirm the date, attendees, and the specific purpose of the meeting.



NEW LEADS

2d. For new leads - initiate engagement through qualifying call and, if possible, schedule face-to-face meeting

When engaging a new lead, initiate the conversation by relating Connected Platforms' services to recognised industry challenges.



“Many businesses within professional services encounter challenges related to outdated I.T. systems or insufficient security measures. At Connected Platforms, our focus is on delivering proactive solutions to ensure seamless operations, reduced downtime, increased security, and optimal productivity.”

Aim to gather sufficient initial information to determine the prospect's suitability and needs. If feasible, schedule a meeting, either in-person or virtually, to further discuss their specific needs.



Remember

As with warm leads, use BANT to qualify the client.





2e. Send client digital audit

Depending on the context of the conversation, it may be appropriate to provide a digital audit, as you do with warm leads. Emphasise that this assessment serves to add value by establishing a clear pathway to enhanced I.T. health.



"We offer a complimentary digital audit to identify potential risks or performance bottlenecks. Would you be receptive to reviewing the findings with us so that we can propose targeted solutions?"



2f. Review digital report and prepare conversation funnel

Following receipt of the audit results (for both warm and new leads), review them meticulously.

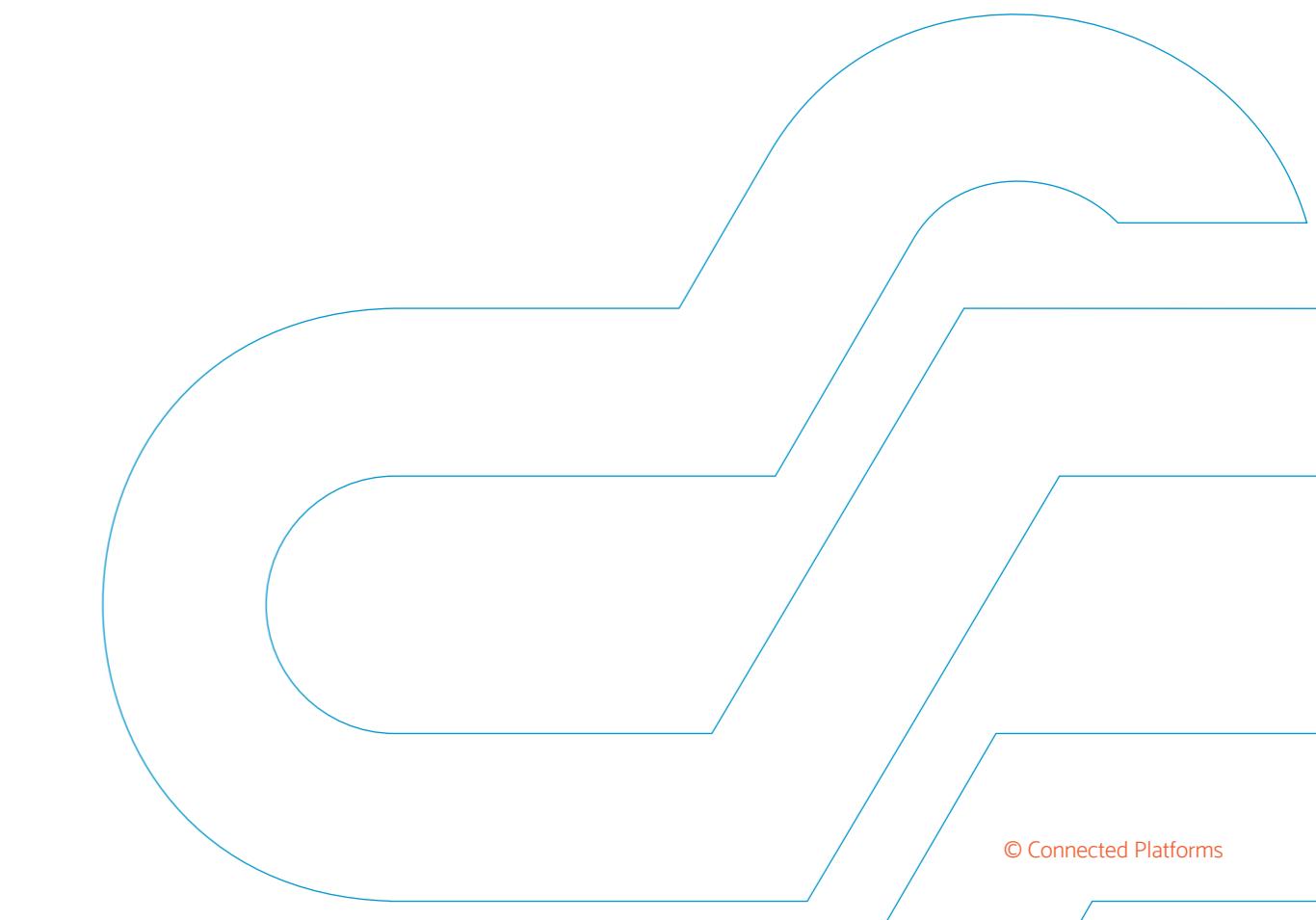
Identify any vulnerabilities, compliance concerns, or performance limitations.

Translate these technical findings into readily, understandable business implications.

- Suboptimal networks could potentially disrupt client communication and team morale.
- Inadequate security measures may leave sensitive data exposed, increasing the risk of breaches.
- Insufficient backup policies might result in data loss or extended periods of downtime.

Utilise this information to develop a conversation funnel—a structured approach for the subsequent call or meeting.

Prioritise the most pressing concerns, clearly linking them to the ways in which Connected Platforms can provide assistance.





2g. Reconnect with client and discuss needs

Schedule a follow-up call or meeting to present insights derived from the digital audit and adopt a consultative approach.

3 W's of a Consultative Approach

- 1** What is meant by consultative? It signifies a sales approach where you function as a collaborative partner rather than merely a vendor. It involves asking probing questions, actively listening, and tailoring solutions to the client's specific challenges, as opposed to promoting a standardised service offering.
- 2** Why is this approach beneficial? Consultative selling fosters trust, as the client perceives that their needs are understood and supported. It also cultivates a deeper sense of partnership, wherein both parties collaborate to enhance the client's I.T. environment.
- 3** How is this implemented? Facilitate open dialogue, actively solicit feedback, and ensure that every recommendation directly addresses specific goals or issues the client has expressed. Validate their concerns and demonstrate empathy by acknowledging the tangible impact of I.T. challenges on their daily operations.



“Our analysis has identified several areas within your system where we believe enhancements to security and productivity are achievable. Let us discuss these findings and collaboratively define what an optimal I.T. environment would entail for your business.”

Demonstrate how each proposed improvement is directly informed by the audit data, thereby reinforcing Connected Platforms' position as a thoughtful and dependable partner that solves problems and adds value.



2h. (GO) Proceed to prepare I.T. Proposal

With a clear understanding of the client's requirements, commence drafting a detailed I.T. Proposal. This should address both immediate re-mediation actions (such as security patching) and longer-term strategic initiatives (such as wireless network optimisation or disaster recovery planning).

Categorise your recommendations into appropriate timeframes:

- ⌚ **Immediate (0-3 months)** – Focus on quick, impactful actions to enhance stability and security.
- ⌚ **Medium-Term (3-12 months)** – Address more comprehensive upgrades or system modifications.
- ⌚ **Long-Term (12-24 months)** – Outline strategic transformations or expansions that align with the client's overarching business objectives.





2i. (NO GO) Update the CRM and add to nurturing campaign

Following the initial discussions, update the CRM with all relevant information gathered during your interaction.

- Contact details and communication preferences
- Business requirements and pain points
- Current I.T. infrastructure insights
- Potential opportunities identified
- Next steps agreed upon

Add the prospect to a nurturing campaign that delivers periodic insights or relevant success stories. This maintains Connected Platforms' visibility and reinforces our commitment to a sustained partnership.



Stage 3: Propose & Close

Overview

Stage 3 transitions from preliminary discussions to the formulation of a formal plan. Drawing upon the information gathered regarding the client's environment, you will present a tailored I.T. Proposal, conduct a trial close, and, ideally, finalise an agreement. Connected Platforms prioritises clarity, reliability, and the cultivation of trust throughout this critical phase.





Stage 3: Propose & Close

(Roles)

These steps relate to the **BDM** (Business Development Manager) and **RAM** (Regional Account Manager) Roles.

Steps

3a. Prepare I.T. proposal and schedule follow-up meeting with client to present

3b. Prepare for client meeting

3c. Present I.T. proposal

3d. Conduct 1-10 trial close

3e. Update the CRM and initiate follow-up cadence

3f. Update the CRM and generate client agreement

3g. Book internal handover meeting (Sales to Service)

3h. Update the CRM and add check-in tasks

3i. Update the CRM and add to nurturing campaign

GO

NO GO



Stage 3: Propose & Close

3a. Prepare I.T. Proposal and schedule follow-up meeting with client to present

Prior to finalising the I.T. Proposal, re-examine all client notes and digital audit data. Specifically, identify:

- **Core Pain Points** – Immediate issues, such as security vulnerabilities or performance limitations.
- **Operational Goals** – The client's broader objectives: for example, cost reduction, scalability, or improved data protection.
- **Industry-Specific Compliance Needs** – Organisations in professional services may be subject to specific regulatory requirements.

Develop a plan that is both concise and comprehensive. Subsequently, schedule the meeting to present and thoroughly discuss it with the client.





3b. Prepare for client meeting

Effective preparation entails more than merely printing a document or creating a presentation; it involves constructing a logical narrative that resonates with the client's core business objectives linked to viable solutions.

- ❖ Assemble relevant case studies or examples from comparable industries / current clients.
- ❖ Ensure your explanations of technical terminology are easily understood by the client.
- ❖ Anticipate potential objections: budget constraints, scheduling concerns, or migration-related risks.
- ❖ Rehearse the meeting flow to effectively convey confidence and clarity.

The presentation can include a combination of deliverables; **including:**

- ❖ **Proposal**
- ❖ **Technology Success Plan Presentation**
- ❖ **Other relevant sales tools** (case studies, videos, example tech etc.)



3c. Present I.T. Proposal

Utilise the scheduled meeting to guide the client through the Proposal including each recommendation, explicitly linking technical enhancements to tangible benefits such as minimised downtime or enhanced productivity.

1. **Recap** – “To reiterate, these are the key findings from the digital audit.”
2. **Proposed Solutions** – “These proposed solutions are designed to directly address the identified security and performance issues.”
3. **Business Impacts** – “Implementation of these solutions could enable you to mitigate I.T.-related disruptions and optimise resource allocation for strategic growth initiatives.”

Maintain a consultative tone throughout the presentation. Encourage client inquiries, acknowledge their concerns, and remain open to considering plan modifications. This signals a genuine commitment to identifying the optimal path forward, rather than simply delivering a rigid, pre-defined solution.

Building Rapport

Building rapport with a potential new customer involves creating a connection and establishing trust. Here are some key concepts to bear in mind:

- ❖ **Personalise Your Approach:** Refer to any previous interactions to show genuine interest in their needs.
- ❖ **Find Common Ground:** Look for shared interests or experiences to build a relatable foundation.
- ❖ **Active Listening:** Pay close attention to what the customer says, acknowledge their points, and ask thoughtful follow-up questions.
- ❖ **Show Empathy:** Understand their challenges and demonstrate a willingness to help.
- ❖ **Maintain a Friendly, Professional Tone:** Use approachable language while staying respectful and professional.
- ❖ **Be Honest and Transparent:** Deliver clear and accurate information to build credibility.



Tips to help you deliver compelling presentation:

❖ Prepare Thoroughly

- » Rehearse your presentation to ensure smooth delivery and confidence in articulating technical solutions.
- » Familiarise yourself with the client's IT infrastructure, their specific needs, and any prior discussions about their IT strategy or challenges.

❖ Tailor Your Delivery

- » Adjust your tone to suit the client's needs—whether formal for high-level executives or more conversational for technical stakeholders.
- » Use industry-specific language that resonates with IT professionals while ensuring it's understandable to non-technical decision-makers.

❖ Start Strong

- » Begin with a clear, engaging introduction that outlines the purpose of the presentation and highlights the specific IT challenges your solution addresses for Connected Platforms.

❖ Maintain Structure

- » Present information in a clear, logical order. Link your technical enhancements to business outcomes, such as increased productivity or improved security posture.
- » Ensure a natural flow from identifying pain points to presenting your solutions and their benefits.

❖ Engage the Customer

- » Make the presentation interactive by asking questions relevant to their IT environment and goals.
- » Encourage feedback throughout to foster collaboration and ensure the solutions presented are aligned with their priorities.



❖ Be Clear and Concise

- » Avoid technical jargon unless necessary, and when used, ensure it is explained in simple terms that relate to their business needs.
- » Focus on delivering concise, actionable information that demonstrates how your solutions can solve specific IT challenges they face.

❖ Leverage Visuals

- » Use visuals like system diagrams, flowcharts, and slides to break down complex IT concepts and demonstrate the impact of your solutions on their infrastructure.
- » Ensure visuals are clear and support the narrative without overwhelming the client with too much detail.

❖ Show Enthusiasm and Confidence

- » Approach the presentation with a positive, solution-focused attitude. Express enthusiasm about how your IT solutions can help Connected Platforms achieve their goals.
- » Be confident in explaining how your proposal will benefit their IT environment, from reducing downtime to improving system performance.

❖ Adapt on the Fly

- » Be ready to adjust your approach if the client raises concerns or asks specific questions. This shows flexibility and a customer-centric attitude.
- » If there's a need for additional clarification on a technical point, take the time to address it thoroughly, and adjust your presentation pace accordingly.

❖ End with Clarity

- » Conclude by summarising the key solutions you've presented and how they directly address the client's IT challenges.
- » Confirm the next steps, whether that's scheduling a follow-up meeting or providing additional documentation, and invite questions to ensure complete understanding.



3d. Conduct 1-10 trial close

A successful trial close helps gauge customer interest without pushing for commitment.

Following the presentation, gauge the client's level of comfort and address any remaining reservations:



"On a scale of 1-10, how confident do you currently feel that this plan effectively addresses your I.T. requirements?"

Should they indicate a score of 8 or lower, employ open-ended questions to elicit the nature of their reservations. Emphasise the inherent flexibility of the plan and the potential for adjustments. This approach ensures the client feels understood and facilitates the identification of any areas in the Proposal that require further clarification.

Key Questions

- "How do you feel about what we have discussed so far?"
- "Does this solution align with what you were envisioning?"
- "Level with me... where abouts are you sitting at the moment?"

Listen carefully for hesitation, as this often signals unspoken concerns. Some customers need technical details, while others prefer focusing on practical implementation—let their interests guide you. Keep focused notes for follow-up, always matching your approach to their specific timeline and needs.

For further insights into addressing client objections, **please refer to the Handling Objections section in the appendix**, where we explore common objections and effective strategies for overcoming them in the context of IT services.



3e. Update the CRM and initiate follow-up cadence

Document detailed meeting notes within your CRM system, capturing:

- The client's response to each recommendation.
- Any requested modifications or clarifications.
- Agreed next steps and suggested timelines.

Follow Up Tips

Following up on a sales Proposal is crucial to keep the conversation going and to move the Client closer to a decision. Here are some tips on how to follow up on a sales Proposal:

- **Set a follow-up date:** When you send the Proposal, set a follow-up date and time with the Client. This ensures that you have a specific time to discuss the Proposal and provides accountability.
- **Send a reminder:** Send a reminder a day or two before the scheduled follow-up date to confirm the appointment and reiterate the value of your Proposal.
- **Personalise your message:** When following up, personalise your message to the Client. Refer to specific points in the Proposal and highlight the benefits that the Client will receive from your solution.
- **Plan subsequent follow-up actions**, such as disseminating a meeting summary within 24 hours or scheduling a further discussion as needed.



3f. (GO) Update the CRM and generate client agreement

Once positive interest is confirmed, formalising the arrangement through a proper client agreement becomes essential. This critical step ensures all discussed terms, conditions, and expectations are documented clearly and professionally.

The client agreement should be comprehensive yet clear, incorporating all elements discussed during previous meetings and presentations. Use the [CRM system name]'s template as your foundation, but ensure it's tailored to reflect the specific solutions and requirements discussed with the client.

Key elements to include:

- Detailed scope of I.T. services and support levels
- Specific requirements and customisations discussed
- Pricing structure and payment terms
- Service level agreements and response times
- Implementation timelines and milestones
- Any special terms or conditions agreed upon

Review all internal notes and meeting summaries to ensure nothing has been overlooked when generating the agreement. Pay particular attention to any specific promises or commitments made during the sales process.



Tip

Create a checklist of standard and custom elements that need to be included in each agreement to ensure consistency and completeness.



3g. Book internal handover meeting (Sales to Service)

The transition from Sales to Service is a crucial phase that requires careful planning and execution. Schedule a comprehensive handover meeting with the service team to ensure all critical information is effectively communicated and understood.

The handover meeting should include both the sales team member who built the relationship and the service team members who will be managing the account moving forward. This ensures no crucial information is lost in translation.

Essential handover elements:

- Detailed overview of the client's business and operations
- Specific pain points and challenges identified during the sales process
- Technical requirements and solution specifications
- Any customisations or special arrangements agreed upon
- Implementation timeline and key milestones
- Risk factors or potential challenges identified
- Client's communication preferences and key contacts
- Historical context of the relationship and any sensitive issues

Prepare a comprehensive handover document that captures all these elements in writing. This serves as a reference point for the service team and ensures continuity of service.



Tip

Schedule the handover meeting well before the service commencement date to allow time for any necessary clarifications or additional information gathering.



3h. Update the CRM and add check-in tasks

Create task reminders in the CRM to ensure client momentum continues after the handover process. This systematic check-in process demonstrates Connected Platforms' commitment to service excellence while identifying any early concerns.

Successful client check-ins require clear ownership, defined outcomes and consistent execution. The CRM must reflect this structured approach through properly documented tasks that guide our team through each interaction.



Tip

Schedule a monthly review of all check-in tasks to ensure nothing falls through the cracks during the critical early service period.



3i. (NO GO) Update the CRM and add to nurturing campaign

Beyond regular service interactions, a well-planned nurturing campaign keeps clients engaged and informed. The CRM serves as the central point for managing these ongoing touchpoints.

Building an effective nurturing campaign involves:

- Configuring automated communication workflows
- Setting up targeted content delivery
- Tracking engagement metrics
- Documenting communication preferences
- Scheduling periodic campaign reviews

The goal is to maintain regular, meaningful contact without overwhelming the client. Each interaction should reinforce Connected Platforms' value while staying relevant to the client's business needs.





Stage 4: Manage & Grow

Overview

Stage 4 signifies the transition beyond the initial sale, focusing on the development of a sustained client relationship. This stage represents a core strength of Connected Platforms—the delivery of proactive I.T. support and the continuous identification of opportunities to enhance clients' systems. The overarching objective is to cultivate long-term partnerships with each new client, fostering confidence in our ability to capably manage their technology.



Roles

These steps relate to the

BDM (Business Development Manager) and

RAM (Regional Account Manager) Roles.

Steps

4a. Salespeople complete check-in tasks

4b. Account Manager and Head of Service to onboard and progress to service activity and account management



4a. Salespeople complete check-in tasks

After the closure of a deal, salespeople should verify that client expectations are aligned with their early experiences of our services.

1. **Confirm Early Satisfaction:** Are the client's initial interactions with our team and service delivery consistent with the assurances provided during the sales cycle?
2. **Collect Feedback:** Be attentive to any indications of confusion or dissatisfaction. Promptly addressing minor concerns can prevent escalation.
3. **Maintain Continuity:** Ensure a seamless transition between the sales process and the service delivery teams.

Maintaining a consultative approach remains essential, even after the agreement is secured.

Continued engagement with clients as partners fosters transparency and reinforces their sense of value.

By posing open-ended questions—such as “How are our services performing thus far?” or “Are there any areas where we could enhance our service delivery immediately?”—you reaffirm Connected Platforms’ genuine commitment to their business success.



4b. Account Manager and Head of Service to onboard and progress to service activity and account management

Upon handover of the account, the Account Manager and Head of Service assume responsibility to:

- **Review All Sales Documentation:** Gain a comprehensive understanding of the client's I.T. environment, the agreed service scope, and any specific challenges identified.
- **Execute Onboarding Steps:** Implement monitoring tools, schedule necessary on-site visits, and confirm all critical deadlines.
- **Develop an Ongoing Support Plan:** Outline proactive system maintenance strategies, address potential risks, and plan for future upgrades and enhancements.
- **Establish Communication Protocols:** Confirm the client's preferred update frequency, optimal channels for support requests, and designate primary points of contact on both sides.

This transition phase is of paramount importance. Ensuring a seamless onboarding process solidifies trust and establishes a robust foundation for a sustained and mutually beneficial partnership.





Appendix

Qualify with BANT

Handling Objections

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Qualify with BANT

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B - Budget

What is their budget, and does this align with our service offerings?

A client's ability to invest in our IT services is a key factor in determining whether they will proceed with our solutions.

Discussing the budget early on helps to qualify the client and ensures we can recommend the most suitable solutions based on their financial scope



Examples of how to approach qualifying on Budget

- ⌚ “Many of the clients we speak to at Connected Platforms about projects like this typically have a rough idea of the budget they’re comfortable with. Do you have a figure in mind?”
- ⌚ If the response is “I have no idea”, you can reply: “No problem. To keep things transparent, let me provide you with a general price range.” For instance, if you know the project usually costs around \$15,000, say: “In cases like this, clients are generally making an investment in the range of \$15,000. It’s unlikely to be \$20,000, and it’s certainly not going to be \$10,000. It’s somewhere around the \$15,000 mark. Does that figure sound reasonable to you?”
- ⌚ Lastly, ask: “What other IT solutions or service providers are you evaluating?”





A - Authority

Does the person I am speaking with have the authority to make the decision?

In today's busy world, our clients often have a lot on their plate. As a result, we may not engage with the primary decision-maker until later in the process—or perhaps not at all.



Examples of how to approach qualifying on Authority

- ⌚ “How do you typically evaluate and compare different IT service proposals?”
- ⌚ “Who else, besides yourself, would be involved in the final decision?”
- ⌚ “How do you make your final decision? Aside from the cost, what other factors are important to you?”
- ⌚ “What matters most to the other decision-makers in this process?”
- ⌚ “What concerns do you anticipate they may have about our proposal?”

N - Need

What is their need, and which of our services will best suit them?

It's our responsibility to identify the client's core needs and match them with the best IT solutions we offer. If we fail to demonstrate how our solution addresses their needs effectively, they are unlikely to proceed with the investment.



Examples of how to approach qualifying on Need

- ⌚ “What specific IT challenges are you currently facing that you'd like to address?”
- ⌚ “What outcomes are you hoping to achieve with a new IT solution?”
- ⌚ “[Client NAME], thanks for answering those questions. It gives me a much clearer understanding of what you're looking to achieve. To clarify further, on a scale of 1 to 10, with 10 being critical and 1 being ‘something I can look at later,’ how urgent is this need for you right now?”



N - Need [STAR Included]

Are they aware of and understand that they have a problem?

When it comes down to it, you're not selling—you're solving problems.

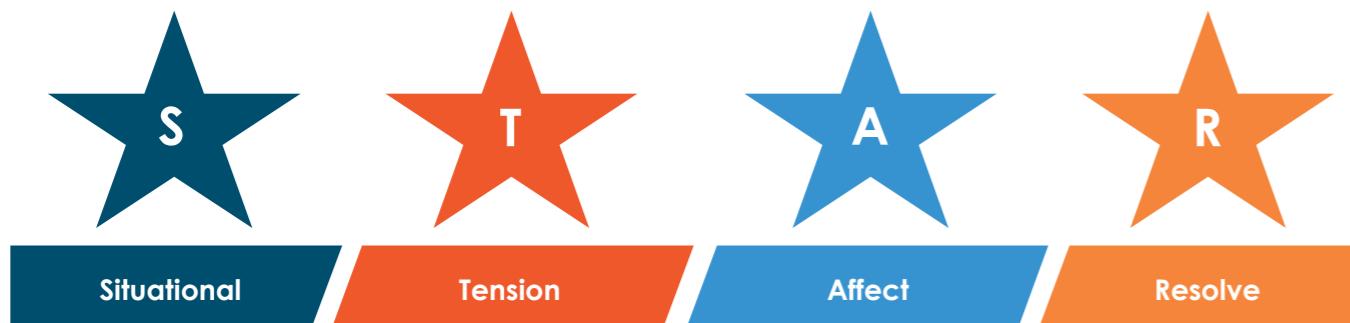
A prospect who understands that a problem exists and is actively seeking a solution is one that genuinely has a need. Needs can vary in scope: One prospect might have an existing solution in place but is unaware of a more effective option. Another may recognise the problem but was unaware that a solution existed, and was not actively searching—perhaps they've “just managed” until now.

It's your responsibility to quickly identify if the need exists, if the prospect is aware of it, and whether there is a genuine appetite for a solution.

Connected Platforms uses the STAR approach to better understand the needs of our prospects:

- ❖ **Situational:** What is the client's current situation? What challenges are they facing in their IT systems?
- ❖ **Tension:** What is the key tension or problem they're experiencing? What's not working or creating friction?
- ❖ **Affect:** How is the issue affecting their business or operations? What impact is this having on their day-to-day activities or long-term goals?
- ❖ **Resolve:** How do they want to resolve the issue, and what kind of solution are they looking for?

This approach helps us gain a clearer understanding of where the prospect stands and how best we can align our IT services with their needs.



Examples of questions for qualifying on Need with STAR

Situational

- ❖ What does your current IT service provider do well?
- ❖ Tell me about your current [IT services/solutions]?
- ❖ How long have you been with your current provider, and would you consider switching for a better solution?
- ❖ What challenges are you currently facing with your existing provider?
- ❖ Can you describe a situation where your current IT solution fell short?
- ❖ Tell me about a recent project or initiative that prompted you to explore new IT solutions.

Tension (Pain Points)

- ❖ Are you experiencing delays in your [IT services/solutions], and how does this impact your business?
- ❖ What specific frustrations are you encountering with your current solution?
- ❖ What are the biggest obstacles preventing you from achieving your IT objectives?



Affect

- ⌚ How have these challenges affected your day-to-day operations or overall productivity?
- ⌚ In what ways have these issues impacted your team's performance and morale?

Resolve

- ⌚ What steps have you taken so far to address these issues?
- ⌚ What would a successful resolution look like for you?
- ⌚ How do you anticipate your operations will improve once these challenges are resolved?

Overall Need Assessment

A simple way to gauge your prospect's need for your solution is to 'get medical'.

Ask them how much their pain points bother them on a scale of 1 – 10.

- ⌚ “[Client NAME], thanks for answering those questions. It certainly gives me a deeper understanding of what you're looking to achieve. Just to clarify, I'm wondering, on a scale of 1 to 10–10 being critical and 1 being ‘I'll deal with it when I can’—where does this need sit with you right now?”

Prospects who rate their pain between 7 and 10 are typically your most qualified leads.

T - Timeframe

When are they considering this purchase? Now or in the future?

Timeframes are a reflection of prioritisation.

If you don't define timeframes early, you risk selling without a clear understanding of the client's needs and urgency



Examples of how to approach qualifying on Timeframe

- ⌚ “When are you looking to make a decision on this solution?”
- ⌚ “What's driving that timeline?”
- ⌚ “Let's discuss timeframes... when do you plan to make a decision on this?”
- ⌚ “How important is this to you, and where does it sit in terms of priority and urgency? Are there other projects or priorities that are also in play at the moment?”
- ⌚ “So just to clarify, you're looking to make a decision by [date]... is that about right?”
- ⌚ “I've delivered many proposals, and sometimes, for various reasons, things change. Could I ask what circumstances might cause this timeframe to shift?”



Case Studies

As you engage with clients, consider any relevant case studies from other clients that may apply.

For example: are there recurring issues across client groups or within specific industries? Are clients experiencing benefits from complementary [IT services/solutions]? Is there a noticeable increase in demand for a particular type of service or solution?

By sharing relevant case studies, you can build credibility and provide evidence of how your IT services have successfully addressed similar challenges for other businesses. This approach can help clients relate to the solutions you offer and demonstrate the value you bring to the table.



Handling Objections

In sales, not every client will immediately agree with our initial approach, and while there are many ways a client might say “no,” most objections typically fall into just a few main categories, such as price, time, and decision-making authority.

When it comes to IT services specifically, there are effective ways to address these common concerns. For performance-related questions, sharing relevant data, case studies, and real-world examples is key, allowing successful implementations to tell the story while the technical expertise behind our solutions backs up every claim.

If clients find the process of adopting new IT solutions daunting, it’s important to simplify the steps and explain our support team’s availability, as clients appreciate knowing they’ll receive assistance when needed.

When cost comes up, the focus should be on long-term value. Demonstrate how our IT solutions lead to increased efficiency, fewer disruptions, and reduced operational costs over time, backed by actual client examples and measurable outcomes. Price objections are common, so it’s important to prepare for them.

For example:

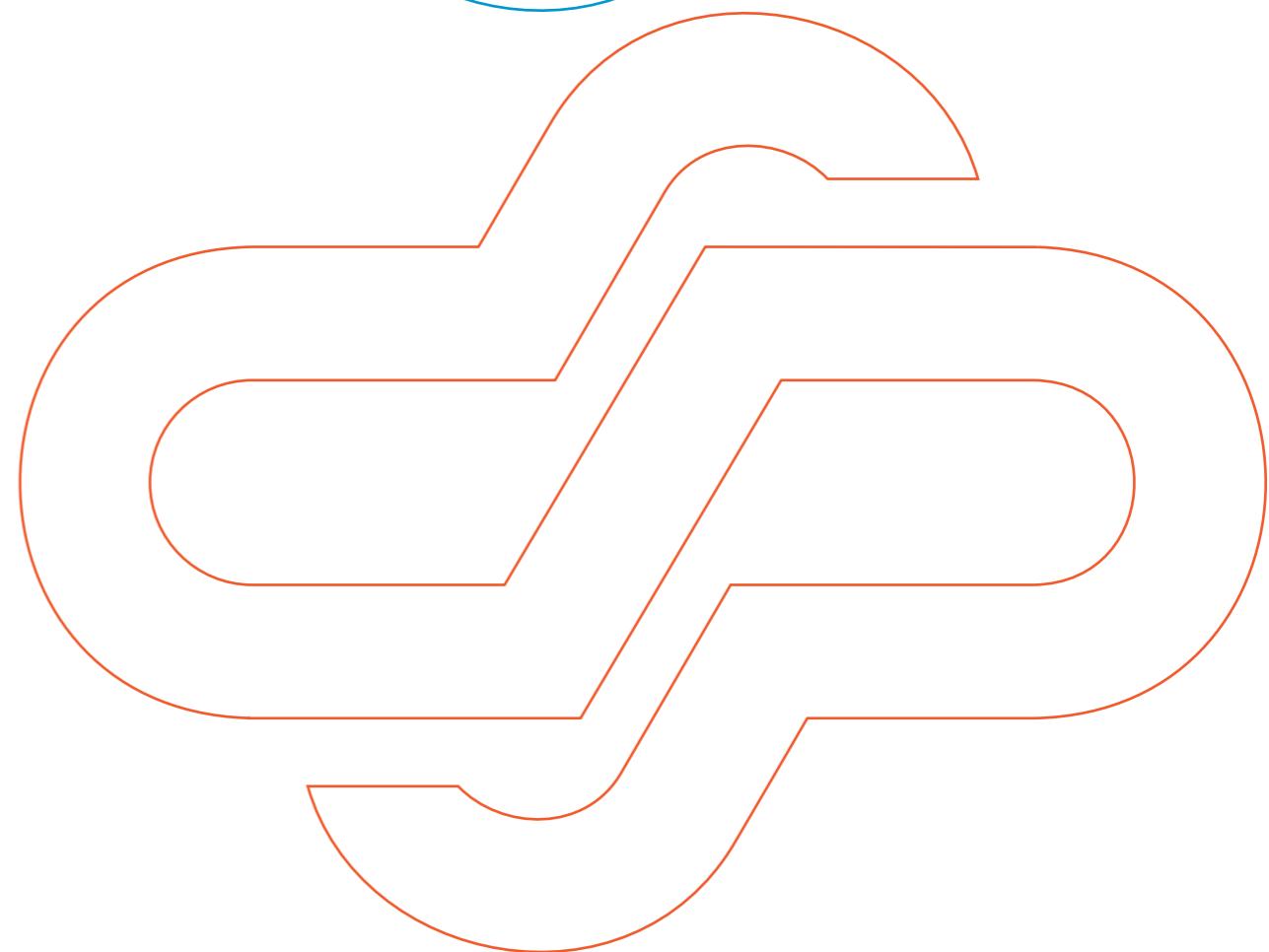
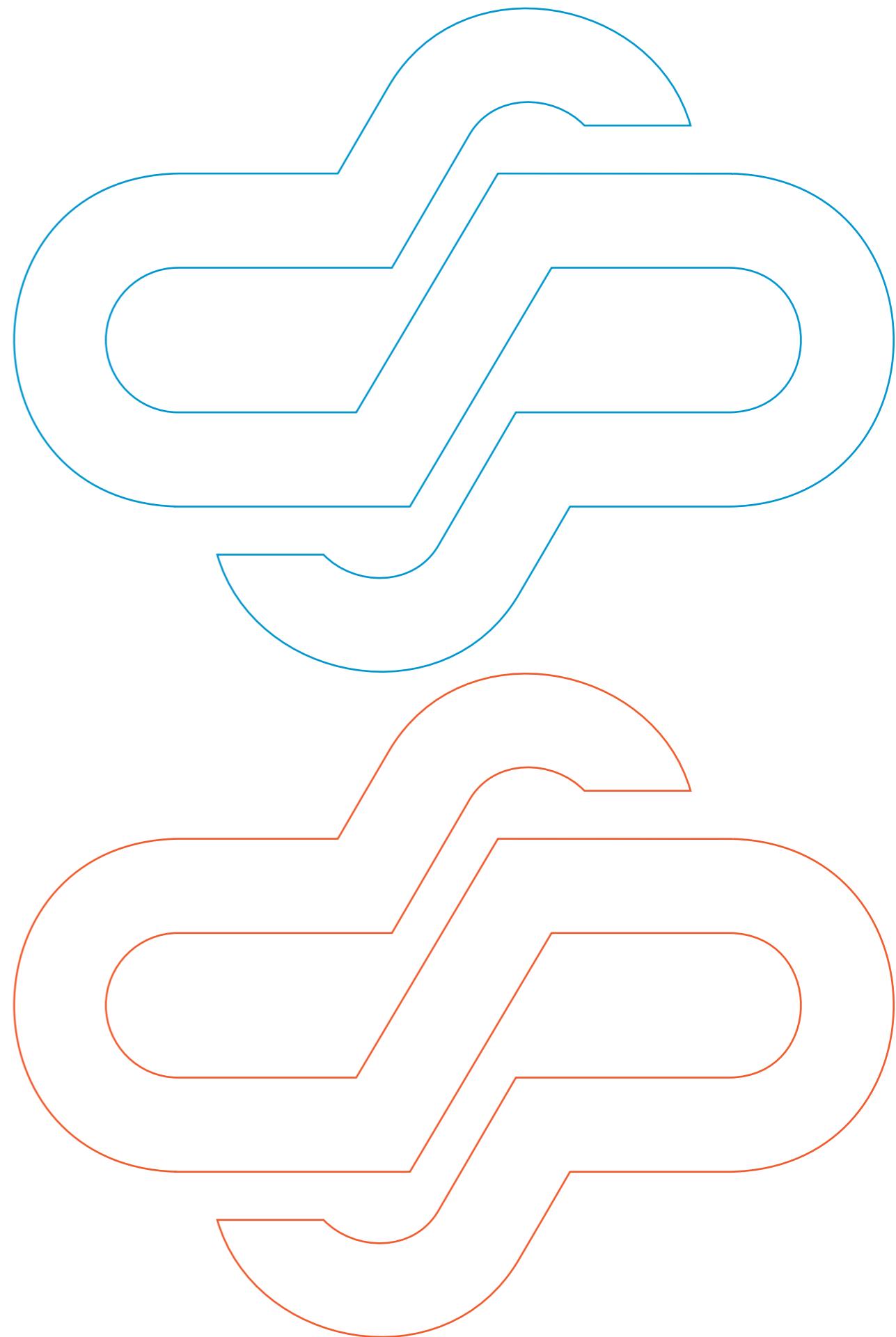
The client may say:

“Your solution is too expensive. I can get a similar service for less from a competitor.”

Approach:

Shift the focus to the overall value, rather than just the price. Use data, case studies, or examples to highlight the long-term ROI and benefits, such as improved system reliability, enhanced security, or greater operational efficiency.

Objections aren’t roadblocks; they’re opportunities to have better conversations. By preparing thoughtful responses and viewing each objection as a chance to build trust and demonstrate value, you can turn resistance into rapport. Remember, the key lies in preparation, curiosity, and aligning your approach with your authentic offering. Every objection you overcome brings you one step closer to closing the deal with confidence.



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