

Client Engagement Specialist - Quick Reference Guide

Daily Activity Checklist

Morning Routine (9:00 AM - 10:00 AM)

- ☐ Review yesterday's activities and follow-ups
- ☐ Check email for new leads or responses
- ☐ Update CRM with latest contact information
- ☐ Plan today's outreach activities (targets, scripts, goals)
- ☐ Review any scheduled calls or meetings

Prospecting Activities (10:00 AM - 12:00 PM)

- ☐ Door-to-door visits: 10-15 businesses
- ☐ Cold calls: 25-30 attempts
- ☐ Email outreach: 50+ personalized emails
- ☐ LinkedIn connection requests: 10-15 per day
- ☐ Follow-up on previous contacts

Afternoon Activities (1:00 PM - 5:00 PM)

- ☐ Schedule and conduct consultations
- ☐ Prepare and send proposals
- ☐ Handle objections and follow-up calls
- ☐ Update prospect information in CRM
- ☐ Plan tomorrow's activities

End of Day (5:00 PM - 5:30 PM)

- ☐ Log all activities and outcomes
- ☐ Schedule follow-up tasks
- ☐ Review progress against weekly goals
- ☐ Prepare materials for next day

Key Performance Metrics

Daily Targets

- **Outreach Contacts:** 100+ (emails, calls, visits combined)
- **Meaningful Conversations:** 10-15
- **Qualified Prospects:** 2-3
- **Meetings Scheduled:** 1-2

Weekly Targets

- **Total Outreach:** 500+ contacts
- **Qualified Meetings:** 8-12
- **Proposals Sent:** 3-5
- **New Clients:** 1-2

Monthly Targets

- **MRR Generated:** \$2,000+ (Month 1-2), scaling to \$5,000+ by Month 3-4
 - **Client Retention:** 95%+
 - **Customer Satisfaction:** 9.0/10
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Quick Scripts Reference

Door-to-Door Opening

"Hi, I'm [Name] with Badger Technologies. I was in the area helping businesses optimize their IT systems and wondered if you have a quick minute? I notice a lot of businesses your size are frustrated with computer problems slowing down their productivity..."

Cold Call Opening

"Hi [Name], this is [Your Name] from Badger Technologies. I help businesses eliminate IT headaches so they can focus on growing their business. Do you have 30 seconds for me to tell you why I'm calling?"

Email Subject Lines (Top Performers)

- "Quick question about your IT challenges"
- "[Company Name] - Eliminate IT frustrations in 30 days"
- "How [Similar Company] reduced IT costs by 40%"
- "2-minute IT assessment for [Company Name]"

Common Objection Responses

"We already have IT support"

→ "That's great! How's that working out for you? Are you getting proactive monitoring and strategic planning, or mostly just fixing problems after they happen?"

"It's too expensive"

→ "I understand cost is a concern. What are you currently spending on IT issues - downtime, emergency calls, lost productivity? Most businesses find we actually save them money."

"We need to think about it"

→ "I completely understand. Can I ask what specifically you'd like to think about? Maybe I can help clarify those points right now."

Consultation Framework

Discovery Questions

1. "Tell me about your current IT setup"
2. "What IT challenges keep you up at night?"
3. "How do you handle computer problems now?"
4. "What happens when systems go down?"
5. "How much time does your team spend on IT issues?"
6. "What are your growth plans for the next 2 years?"

Needs Assessment Process

1. **Listen** - Let them explain their pain points
2. **Probe** - Ask follow-up questions to understand impact
3. **Quantify** - Help them calculate cost of current problems
4. **Visualize** - Paint picture of life with managed IT
5. **Recommend** - Suggest appropriate service package
6. **Close** - Ask for the business

Service Package Quick Reference

Essential IT Support - \$799/month

Best for: 5-15 employees

Key selling points:

- Complete IT support for less than part-time employee
- 4-hour response time
- Proactive monitoring prevents problems
- Predictable monthly cost

Professional IT Management - \$1,499/month

Best for: 15-35 employees

Key selling points:

- Everything in Essential PLUS on-site visits
- Strategic IT planning to support growth
- 2-hour response time
- Quarterly business reviews

Enterprise IT Solutions - \$2,999/month

Best for: 35+ employees

Key selling points:

- 24/7 support and dedicated account manager
 - Virtual CIO services for strategic guidance
 - Unlimited on-site support
 - Enterprise-grade security and compliance
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ROI Calculation Helper

Current IT Costs (Help prospect calculate)

- **In-house IT person:** \$70,000+ per year
- **Emergency IT calls:** \$150/hour x issues = \$___/year
- **Downtime costs:** Hours down x employees x hourly wage = \$___
- **Lost productivity:** IT problems x time wasted x wage = \$___

Our Solution Value

- **Predictable costs:** Fixed monthly fee
- **Reduced downtime:** 75% fewer issues
- **Increased productivity:** No more IT distractions
- **Strategic guidance:** Technology that supports growth

Monthly Goals Tracker

Month 1-2 Goals

- ☐ 2-3 new clients signed
- ☐ \$2,000-4,500 MRR generated
- ☐ 800+ total outreach contacts
- ☐ 20+ qualified meetings conducted

Month 3-4 Goals

- ☐ 5-6 total clients
- ☐ \$5,000-8,000 total MRR
- ☐ Referral program established
- ☐ 90%+ client satisfaction score

Month 5-6 Goals

- ☐ 8-10 total clients
- ☐ \$8,000-12,000 total MRR
- ☐ Industry specialization developed
- ☐ Advanced service upsells

Emergency Contact Information

Immediate Support:

- Benjamin Sherman: (815) 367-6989
- Email: benjamin@badgertechnologies.us

Technical Questions:

- Escalate to Benjamin for technical details

- Reference service overview documents
- Use "I'll get you that information" when unsure

Pricing Authority:

- Standard packages: Full authority
 - Custom pricing: Must consult Benjamin
 - Discounts: Up to 10% first month free
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Success Tips

Mindset

- Focus on helping, not selling
- Every "no" gets you closer to "yes"
- Rejection is part of the process
- Your solution genuinely helps businesses

Best Practices

- Always follow up within 24 hours
- Take detailed notes on every interaction
- Ask for referrals from happy prospects
- Stay organized with CRM system
- Celebrate small wins daily

Common Mistakes to Avoid

- Talking too much, not listening enough
 - Focusing on features instead of benefits
 - Not asking for the sale
 - Giving up after first objection
 - Not following up consistently
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Keep this guide handy for quick reference during your daily activities!

Remember: You're not just selling IT services - you're helping businesses eliminate frustrations and focus on what they do best. Your solution genuinely improves their operations and quality of life.