Sales & Client Acquisition Specialist Training

Badger Technologies Internal Training

Course Overview

Duration: 3-4 hours (self-paced)
Modules: 10 comprehensive modules
Target Audience: Client Acquisition Specialists and Sales Team Members

Module 1: Understanding Badger Technologies

Our Mission

Badger Technologies provides comprehensive managed IT services and cybersecurity solutions to small and medium-sized businesses. We protect businesses from technology failures and cyber threats while empowering growth through reliable, modern IT infrastructure.

What We Do

Managed IT Services

- Proactive monitoring and maintenance
- Help desk support (24/7 availability)
- Network management and optimization
- Hardware and software procurement
- Strategic IT planning

Cybersecurity Solutions

- Advanced threat protection
- Firewall and network security
- Email security and spam filtering
- Security awareness training
- Compliance assistance (HIPAA, PCI, etc.)

Cloud Services

- Microsoft 365 deployment and management
- Cloud migration services
- Backup and disaster recovery
- Virtual desktop infrastructure

Professional Services

- IT assessments and audits
- Network design and implementation

- Server setup and migration
- Compliance consulting

Our Ideal Client

Company Size: 10-100 employees

Industries We Serve:

- Healthcare (medical offices, dental practices)
- Professional services (law firms, accounting)
- Finance and insurance
- Manufacturing
- Non-profits
- Retail

Pain Points We Solve:

- Unreliable IT causing downtime
- Security concerns and compliance needs
- Lack of internal IT expertise
- Unpredictable IT costs
- Need for remote work capability
- Aging infrastructure

Red Flags (Good Prospects):

- Currently using break-fix IT support
- No dedicated IT staff
- Recent security scare
- Planning to grow
- Compliance requirements
- Working with outdated technology

Our Value Proposition

What Makes Us Different:

1. **Proactive vs. Reactive**

   - We prevent problems before they happen
   - Monitoring 24/7, not just when things break
   - Predictable monthly costs

2. **Local + Expert**

   - Wisconsin-based team
   - Real people, not call centers
   - Industry-specific expertise

3. **Comprehensive Security**

- Multi-layered protection
- Continuous monitoring
- Regular security training

4. **Business Partnership**

   - We align IT with business goals
   - Strategic planning, not just break-fix
   - Dedicated account management

Elevator Pitch (30 seconds): "Badger Technologies is a managed IT service provider specializing in cybersecurity for small to medium businesses. We prevent IT problems before they happen, protect you from cyber threats, and provide unlimited support for one predictable monthly fee. Think of us as your outsourced IT department—we handle all your technology needs so you can focus on running your business."

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module 2: The Sales Process

Our Sales Methodology: Consultative Selling

We don't "sell" services—we solve problems. Our approach:

1. **Listen** - Understand their business and challenges
2. **Assess** - Identify gaps and risks
3. **Educate** - Help them understand their situation
4. **Recommend** - Prescribe the right solution
5. **Partner** - Build long-term relationships

The Sales Funnel

Stage 1: Prospecting

- Identify potential clients
- Research their business
- Find contact information
- Determine decision makers

Stage 2: Initial Contact

- Cold calls/emails
- Networking events
- Referrals
- Inbound inquiries

Stage 3: Discovery Call

- Qualify the prospect
- Understand pain points
- Build rapport
- Schedule assessment

Stage 4: Technical Assessment

- On-site or virtual evaluation
- Document current state
- Identify risks and opportunities
- Calculate ROI

Stage 5: Proposal

- Customized solution
- Clear pricing
- Implementation timeline
- Value proposition

Stage 6: Closing

- Address objections
- Negotiate terms
- Sign agreement
- Schedule onboarding

Stage 7: Onboarding

- Smooth transition
- Meet the team
- Set expectations
- Quick wins

Sales Metrics & Goals

Key Performance Indicators (KPIs):

Activity Metrics:

- Calls made per day: 30-50
- Emails sent per day: 50-75
- LinkedIn connections: 10-15 per day
- Networking events: 2-4 per month

Pipeline Metrics:

- Discovery calls scheduled: 5-8 per week
- Assessments completed: 3-5 per week
- Proposals sent: 2-4 per week
- Close rate: 30-40%

Revenue Metrics:

- Monthly Recurring Revenue (MRR) target
- Average deal size: $1,500-3,000/month
- Sales cycle length: 30-60 days
- Customer Acquisition Cost (CAC)

Personal Goals:

- Month 1-3: Learn products, shadow calls, assist with proposals
- Month 4-6: 1-2 closed deals per month
- Month 7+: 3-5 closed deals per month

Module 3: Prospecting & Lead Generation

Identifying Prospects

Ideal Company Profile:

- 10-100 employees
- Professional office environment
- Handling sensitive data
- Currently struggling with IT
- No full-time IT staff
- Budget for IT services ($3,000-10,000/month)

Where to Find Prospects:

LinkedIn

- Search by industry and company size
- Connect with owners/decision makers
- Engage with their content
- Share valuable information
- Join relevant groups

Local Business Directories

- Chamber of Commerce
- Business journals
- Industry associations
- Yelp/Google Business

Networking Events

- Chamber meetings
- Industry conferences
- Business after-hours
- Charity events
- Trade shows

Referrals

- Current clients (best source)
- Professional networks
- Business partners
- Friends and family

Inbound Marketing

- Website contact forms
- Free assessment offers
- Educational content
- Google/social ads

Research Before Outreach

Company Research (5-10 minutes):

1. Visit their website
2. Check LinkedIn company page
3. Read recent news/press releases
4. Identify decision makers
5. Note company size and industry
6. Look for technology indicators

Decision Maker Research:

1. LinkedIn profile review
2. Mutual connections?
3. Recent posts or activities
4. Background and interests
5. How long at company?

Red Flags to Look For:

- Job postings for IT staff (timing opportunity)
- News about growth/expansion
- Compliance requirements in industry
- Recent security breach in their sector
- Old website (indicates old IT)
- Mentions of technology challenges

Building Your Prospect List

Daily Routine:

1. Identify 20-30 new prospects
2. Research and qualify each
3. Find contact information
4. Add to CRM with notes
5. Prioritize by potential

List Segmentation:

Hot Leads:

- Inbound inquiries
- Referrals

- Expressed immediate need
- Action: Contact within 1 hour

Warm Leads:

- LinkedIn connections
- Met at events
- Engaged with content
- Action: Contact within 24 hours

Cold Leads:

- Fit ideal profile
- No prior contact
- Researched and qualified
- Action: Add to outreach sequence

Module 4: Cold Outreach That Works

Cold Calling Best Practices

Mindset:

- You're helping, not selling
- Rejection is normal (expect 95% no)
- Every "no" gets you closer to "yes"
- Stay positive and energetic
- Track and improve

Preparation:

- Research the company (5 minutes)
- Know decision maker's name
- Prepare opening hook
- Have calendar ready
- Clear goal: schedule discovery call

Cold Call Structure:

Opening (10 seconds): "Hi [Name], this is [Your Name] with Badger Technologies. How are you today?"

[Brief pause for response]

Hook (15 seconds): "I'm calling because we work with [similar companies in their industry] to protect them from cyber threats and prevent costly IT downtime. I noticed [specific observation about their business]."

Permission (5 seconds): "Do you have 30 seconds for me to explain why I'm calling?"

Value Statement (30 seconds): "We specialize in helping [industry] companies like yours with [specific pain point]. Most businesses we talk to are concerned about [ransomware/downtime/security]. We've helped companies like [similar client] reduce IT costs by 30% while improving security."

Qualifying Question: "Are you currently satisfied with your IT support and cybersecurity?"

Listen and Adapt: [Based on response, dig deeper or pivot]

Call to Action: "I'd love to offer you a complimentary IT security assessment—we'll identify any vulnerabilities and show you how to protect your business. Do you have 15 minutes this week for a quick call?"

Sample Cold Call Scripts:

Script 1: Security Focused "Hi [Name], this is [Your Name] with Badger Technologies. The reason I'm calling is that ransomware attacks on [their industry] businesses have increased 300% this year. We've been helping local companies protect themselves, and I wanted to reach out to see if cybersecurity is something you're taking seriously. Are you currently confident in your business's security measures?"

Script 2: Downtime/Reliability "Hi [Name], [Your Name] here from Badger Technologies. I work with [industry] companies to eliminate IT downtime and keep teams productive. Quick question—when your computers or network go down, how long does it typically take to get back up and running?"

Script 3: Cost/Efficiency "Hi [Name], this is [Your Name] with Badger Technologies. We specialize in helping businesses like yours reduce IT costs while improving reliability. Most companies we work with are overspending on technology and still dealing with frequent problems. Would you be open to a free assessment to see if there's room for improvement?"

Handling Gatekeepers

Be Respectful and Professional: "Good morning! This is [Your Name] with Badger Technologies. I'm calling to speak with [Decision Maker] about their IT security. Is he/she available?"

If They Ask What It's About: "I'm following up regarding cybersecurity solutions for [Company]. Is [Decision Maker] the right person to discuss IT services?"

If They Offer to Take a Message: "Actually, do you know the best time to reach [him/her]? I'd prefer to speak directly."

Build Relationship: "I really appreciate your help! What's your name? [Remember it!] Thanks, [Gatekeeper Name]. When's the best time to call back?"

Alternative Approach: Call before 8am or after 5pm—decision makers often answer their own phones outside business hours.

Email Outreach

Subject Lines That Get Opened:

- "Quick question about [Company]'s IT security"
- "[Mutual Connection] suggested I reach out"
- "Protecting [Industry] businesses from ransomware"
- "Free IT assessment for [Company]"
- "5-minute conversation about [Pain Point]?"

Email Structure:

Opening: Personalize—mention something specific about them/their business

Problem: Identify a pain point relevant to them

Solution: Briefly explain how you help

Social Proof: Mention similar client or result

Call to Action: Clear next step (schedule call)

Sample Email Templates:

Template 1: Value-First

```
Subject: IT Security Assessment for [Company]

Hi [Name],

I came across [Company] and noticed [specific observation]. Given the recent
increase in cyberattacks targeting [their industry], I wanted to reach out.

We work with [similar company type] to protect against ransomware and ensure
business continuity. Most companies we assess discover at least 3-5 critical
vulnerabilities they weren't aware of.

I'd like to offer [Company] a complimentary security assessment. We'll:
- Identify security gaps
- Show you exactly what's at risk
- Provide recommendations (no pressure to buy)

Are you available for a 15-minute call this week?

Best regards,
[Your Name]
Badger Technologies
[Phone] | [Email]
```

Template 2: Problem-Solution

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Subject: How often does IT downtime cost you money?

Hi [Name],

Quick question: When was the last time your team couldn't work because of an IT
issue?

We help [industry] businesses eliminate IT downtime through:
✓ 24/7 proactive monitoring
✓ Immediate response to issues
✓ Preventive maintenance
✓ Predictable monthly costs
```

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One client reduced downtime from 2 days/month to less than 1 hour/month—saving
over $50,000 annually in lost productivity.

Would you be open to a 15-minute conversation about how we could help [Company]?

[Your Name]
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Template 3: Referral/Connection

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Subject: [Mutual Connection] recommended I reach out

Hi [Name],

[Mutual Connection] at [Company] mentioned you might be interested in improving
[Company]'s IT security. We recently helped them [specific result].

I'd love to offer the same complimentary assessment we provided them. It's a no-
pressure look at your current setup with actionable recommendations.

Are you free for a quick call this week?

Thanks,
[Your Name]
```

Follow-Up Sequence:

Day 1: Initial email
Day 3: Follow-up if no response
Day 7: Different angle/value prop
Day 14: Final follow-up (break-up email)
Day 30: Re-engage with new content/offer

Break-Up Email (Works Surprisingly Well):

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Subject: Should I close your file?

Hi [Name],

I've reached out a few times about a complimentary IT assessment but haven't heard
back.

I don't want to be a pest! Should I assume:
a) You're all set with IT and security
b) Now's not the right time
c) You'd like to talk but haven't had a chance

Just let me know and I'll respect your wishes.
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Thanks,
[Your Name]
```

LinkedIn Outreach

Connection Request Message: "Hi [Name], I work with [industry] businesses on IT security and saw you're at [Company]. I'd like to connect and share some insights relevant to your industry. Looking forward to connecting!"

After Connection: Wait 2-3 days, then send: "Thanks for connecting, [Name]! I noticed [Company] is [growing/in X industry/etc.]. We specialize in helping businesses like yours with [value prop]. Would you be open to a brief conversation about your IT and cybersecurity needs?"

Engagement Strategy:

- Comment on their posts
- Share valuable content
- Congratulate on work anniversaries
- Build relationship before pitching

Module 5: Discovery Calls & Needs Assessment

Discovery Call Objectives

1. **Qualify the prospect** - Are they a good fit?
2. **Build rapport** - Establish trust and credibility
3. **Understand pain points** - What problems do they have?
4. **Educate** - Help them see risks they might not know about
5. **Schedule assessment** - Get commitment to next step

Discovery Call Structure (15-30 minutes)

Opening (2 minutes): "Thanks for taking the time to speak with me today, [Name]. Just to set expectations, I'd like to learn about your business and current IT situation. I'll ask some questions, and then we can discuss whether it makes sense to do a more thorough assessment. Sound good?"

Company Overview (3 minutes):

- "Tell me about your business. What do you do?"
- "How long have you been in business?"
- "How many employees do you have?"
- "Any plans to grow or expand?"
- "What locations do you have?"

Current IT Situation (5 minutes):

- "Who handles your IT currently?"
- "How many computers and servers do you have?"
- "When something breaks, what's the process?"

- "What's your biggest IT frustration?"
- "How often do you experience IT issues or downtime?"

Security & Backup (5 minutes):

- "What are you doing for cybersecurity?"
- "Do you have a firewall? What kind?"
- "How are you backing up your data?"
- "When was the last time you tested a restore?"
- "Ever had a security scare or breach?"
- "Do you have any compliance requirements?" (HIPAA, PCI, etc.)

Pain Points & Impact (5 minutes):

- "What happens to your business when IT goes down?"
- "How much does downtime cost you per hour?"
- "What keeps you up at night regarding technology?"
- "If you could wave a magic wand, what would you fix?"

Budget & Timeline (3 minutes):

- "What are you currently spending on IT monthly?"
- "Do you have a budget for improving IT?"
- "What's driving this conversation—what changed?"
- "What's your timeline for making a decision?"

Closing (2 minutes): "Based on what you've told me, I think we could definitely help. The next step would be a comprehensive IT assessment where we'd:

- Evaluate your current infrastructure
- Identify security vulnerabilities
- Document findings and recommendations
- Show you exactly what needs attention

This typically takes about 2 hours on-site and there's no cost or obligation. When would work better for you—this Thursday or next Tuesday?"

Qualifying Questions

BANT Framework:

Budget:

- "What are you currently spending on IT?"
- "Do you have a budget allocated for IT improvements?"
- "How do you typically budget for technology?"

Authority:

- "Who else is involved in IT decisions?"
- "What's your decision-making process?"
- "Is there anyone else we should include in our discussion?"

Need:

- "What prompted you to look for IT services now?"
- "What problems are you trying to solve?"
- "What happens if you don't address this?"

Timeline:

- "When do you need this in place?"
- "What's driving your timeline?"
- "Any upcoming deadlines or events?"

Red Flags (Disqualify)

Don't waste time on:

- Budget under $1,000/month (too small)
- Just price shopping (no real problems)
- Happy with current provider (no pain)
- No decision-making authority (can't close)
- Unrealistic expectations (can't satisfy)
- "Just send me a quote" (not qualified)

Polite Exit: ☑ and it sounds like you need [Y]. I'd be happy to refer you to someone who might be better suited."

Taking Notes

During Call, Document:

- Company details (employees, locations, industry)
- Current IT setup (provider, equipment, software)
- Pain points and frustrations
- Budget range
- Timeline and urgency
- Decision makers
- Next steps

Immediately After Call:

- Update CRM with detailed notes
- Set follow-up tasks
- Send calendar invite for assessment
- Send follow-up email

Module 6: Conducting Assessments

Types of Assessments

Remote Assessment (1 hour):

- Screen share
- Review systems remotely
- Good for initial evaluation
- Can be done quickly

On-Site Assessment (2-4 hours):

- Physical inspection
- More thorough evaluation
- Build stronger relationship
- Preferred approach

Comprehensive Audit (Full day):

- Detailed documentation
- Security testing
- Compliance review
- For larger prospects

Assessment Checklist

Network Infrastructure: □ Internet speed and provider □ Router/firewall (brand, model, age) □ Switches (managed/unmanaged) □ Wi-Fi access points □ Cabling and infrastructure □ Network diagram available?

Servers: □ Number and purpose □ Operating systems and versions □ Physical or virtual? □ Age and warranty status □ Backup configuration □ Updates and patches current?

Workstations: □ Total count □ Desktop vs. laptop □ Operating systems □ Age and condition □ Antivirus installed? □ Updates current?

Security: □ Firewall (what kind?) □ Antivirus/EDR solution □ Email security/spam filtering □ Password policies □ Multi-factor authentication? □ Security awareness training? □ Last security incident?

Backup & Disaster Recovery: □ Backup solution (what/how often) □ On-site and off-site backups □ Last successful backup □ Last tested restore □ Disaster recovery plan exists?

Cloud Services: □ Microsoft 365, Google Workspace? □ Cloud storage solutions □ Cloud-based applications □ VPN for remote access

Applications: □ Line-of-business software □ Industry-specific applications □ Licensing status □ Version/support status

Documentation: □ Network documentation □ Password management □ IT policies □ Vendor contacts

Identifying Issues & Opportunities

Critical Issues (Address Immediately):

- No backup or failed backups
- Unsupported operating systems (Windows 7, Server 2008)
- No firewall or consumer-grade only
- No antivirus or outdated

- Shared admin passwords
- Compliance violations

High Priority:

- Aging hardware (5+ years)
- No disaster recovery plan
- Weak password policies
- No email security
- Limited or no documentation
- Single points of failure

Opportunities:

- Cloud migration potential
- Microsoft 365 upgrade
- Remote work capability
- Security improvements
- Hardware refresh
- Process automation

Documenting Findings

Assessment Report Should Include:

1. **Executive Summary**

   - Overall health score
   - Critical issues found
   - Key recommendations

2. **Current State**

   - Inventory of equipment
   - Software and services
   - Network diagram
   - Security posture

3. **Risk Analysis**

   - Security vulnerabilities
   - Business continuity risks
   - Compliance gaps
   - Financial impact

4. **Recommendations**

   - Prioritized action items
   - Short-term (immediate)
   - Medium-term (3-6 months)
   - Long-term (strategic)

5. **Investment**

    - Cost breakdown
    - ROI analysis
    - Comparison to current spend
    - Payment options

Assessment to Proposal

Follow-Up Timeline:

Day 1: Conduct assessment
Day 2-3: Prepare detailed report and proposal
Day 4: Send proposal via email
Day 5: Follow-up call to review
Day 7: Answer questions, address concerns
Day 10: Close or schedule another meeting

Assessment Follow-Up Email:

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Subject: [Company] IT Assessment Results

Hi [Name],

Thank you for the time yesterday. I enjoyed learning about [Company] and seeing
your current setup.

As promised, I've attached our assessment findings and recommendations. Here are
the key highlights:

✓ [Positive finding]
⚠ [Critical issue 1]
⚠ [Critical issue 2]
💡 [Opportunity]

I've also included a customized proposal for our managed services that addresses
these items.

Are you available for a 15-minute call tomorrow to review the findings?

Best regards,
[Your Name]
```

Module 7: Proposals & Pricing

Our Service Offerings

Managed IT Services:

Essential Plan ($1,500-2,500/month for 10-20 users)

- 24/7 monitoring and alerts
- Help desk support (business hours)
- Patch management
- Antivirus/basic security
- Monthly reporting
- Best for: Basic IT needs, limited budget

Professional Plan ($2,500-4,000/month for 10-20 users)

- Everything in Essential
- 24/7 help desk support
- Advanced security (EDR, email filtering)
- Backup monitoring
- Quarterly business reviews
- Strategic planning
- Best for: Most businesses, standard needs

Premium Plan ($4,000-6,000/month for 10-20 users)

- Everything in Professional
- Priority response (15-minute SLA)
- Dedicated account manager
- Compliance assistance
- Security awareness training
- Advanced reporting
- Best for: Regulated industries, high-security needs

À La Carte Services:

- Project work (implementations, migrations)
- Cloud services (Microsoft 365, Azure)
- Hardware procurement
- Specialized consulting
- Training

Pricing Strategies

Value-Based Pricing: Don't compete on price—compete on value.

Frame Investment vs. Current Costs:

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Current Situation:
 - Break-fix IT: $6,000/year (unpredictable)
 - Downtime: 2 days/year = $15,000 lost productivity
 - Security risk: Potential $200K+ from breach
 - Total Risk: $221,000+

Our Solution:
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- Managed Services: $30,000/year (predictable)
- Eliminate most downtime: Save $12,000
- Reduce security risk: Priceless
- Net Difference: $18,000/year investment for $233,000 protection
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ROI Examples:

Productivity Gains: "Our clients typically see 20% improvement in IT productivity. For your 25 employees at an average salary of $50,000, that's $250,000 in total payroll. A 20% improvement = $50,000 in gained productivity. Our service costs $36,000/year. ROI = 39%."

Downtime Prevention: "You mentioned downtime costs you about $5,000 per day. Last year you had 3 significant outages = $15,000. Our monitoring prevents 90% of issues. Save $13,500 + gain peace of mind. Our service is $30,000/year, pays for itself in 2 years just from downtime prevention alone."

Security Protection: "The average ransomware attack costs $200,000+ (ransom, recovery, lost business). Our advanced security suite costs $8,000/year. If we prevent just ONE attack in 25 years, it's paid for itself. Most businesses face multiple attempts per year."

Proposal Structure

Section 1: Executive Summary

- Thank them for the opportunity
- Briefly recap their situation
- Highlight key problems identified
- Summarize your recommendation

Section 2: Understanding Your Needs

- Restate their pain points
- Show you listened and understand
- Build urgency around issues

Section 3: Our Solution

- Recommended service level
- What's included
- How it solves their problems
- Implementation timeline

Section 4: Investment

- Clear pricing breakdown
- Monthly recurring costs
- One-time setup fees (if any)
- Comparison to current costs
- Payment terms

Section 5: Why Badger Technologies

- Our experience and expertise
- Similar clients we've helped
- Our approach and values
- Guarantee or commitment

Section 6: Next Steps

- Clear call to action
- Timeline for decision
- Implementation schedule
- Contact information

Proposal Presentation

Don't Just Email—Present It:

"I don't want to just email this over and leave you with questions. Can we schedule 20 minutes to walk through it together?"

During Presentation:

1. Review assessment findings
2. Explain recommendations
3. Walk through pricing
4. Address questions
5. Ask for the business

Present Pricing Last: Build value first, then discuss investment.

Trial Close Throughout:

- "Does that make sense?"
- "How does that sound?"
- "Would that solve your problem?"

Module 8: Overcoming Objections

Common Objections & Responses

Objection 1: "It's too expensive"

Response: "I understand—it's an investment. Let me ask: what are you spending now?"

[They tell you]

"OK, so you're spending $X per year on break-fix support, plus you mentioned losing $Y to downtime. That's $Z total. Our solution is $A per month = $B per year. The difference is only $C, and for that you get 24/7 monitoring, proactive maintenance, and peace of mind. Plus, we'll reduce your downtime by 90%, saving you $Y2. Actually, you'll save money while getting better service. Does that make sense?"

Alternative Response: "Too expensive compared to what? Fixing problems after they happen, or preventing them? The real question is: what does downtime cost your business?"

Objection 2: "We need to think about it"

Response: "Absolutely, this is an important decision. Can I ask—what specifically do you need to think about? Is it the investment, the timeline, or something else?"

[They explain]

"I appreciate that. Let me address [their concern]. [Provide information]. What would make you comfortable moving forward?"

Alternative Response: "I understand. What questions can I answer to help your decision? [Address]. How about we start with a 90-day trial? If you're not completely satisfied, we part as friends. Fair enough?"

Objection 3: "We're happy with our current IT person/company"

Response: "That's great that you have someone! I'm curious—are they available 24/7? Do they provide proactive monitoring? What's their average response time?"

[Usually reveals gaps]

"Here's the thing: we work alongside internal IT people all the time. They handle day-to-day items, we provide enterprise-level support, after-hours coverage, and strategic planning. Many clients use us as a backup to their IT person. That way, there's no single point of failure. Would that model work for you?"

Alternative Response: "I respect that relationship. Let me ask—what happens when they're on vacation or sick? What's your backup plan? We often serve as the backup tier for businesses with internal IT. No obligation to switch—just another resource when needed."

Objection 4: "We're too small for managed services"

Response: "Actually, small businesses benefit most from managed services because:

1. You don't have an IT department to fall back on
2. You can't afford extended downtime
3. Cybercriminals target small businesses (easier targets)
4. You get enterprise-level protection at small business prices

We work with businesses your exact size. You get the same security and support that Fortune 500 companies have, scaled for your needs. Isn't that exactly what you need?"

Objection 5: "We just need someone for emergencies"

Response: "I understand that's how most businesses think about IT. But here's the problem with that approach:

Break-Fix Model:

- Wait for things to break
- Pay premium for emergency service
- Experience downtime and lost productivity
- Unpredictable costs
- Reactive and stressful

Managed Services:

- Prevent issues before they happen
- Included in monthly fee
- Minimal downtime
- Predictable budget
- Proactive and stress-free

Which sounds better for your business? Plus, if you calculate what you spend annually on emergency fixes plus the cost of downtime, our managed services usually cost the same or less."

Objection 6: "Can you send me a quote?"

Response: "I could send you a quote, but it wouldn't be accurate without understanding your specific needs. Every business is different. I'd hate to quote too high and scare you off, or too low and not be able to deliver what you need.

How about this: let's schedule a quick 15-minute call where I ask a few questions about your setup. Then I can put together a customized proposal that actually addresses your needs. Do you have 15 minutes this week?"

Objection 7: "We're comparing you with other providers"

Response: "Smart! You should compare. Let me make sure you're comparing apples to apples. What specifically are you comparing?"

[They explain]

"Great. When you compare, make sure to ask:

- Are they available 24/7 or just business hours?
- Do they provide proactive monitoring or just break-fix?
- What's their average response time?
- Do they have experience in your industry?
- What's included vs. what costs extra?
- Do they provide strategic planning?

We're confident that when you compare the total value, not just price, we're the clear choice. What questions can I answer about our services?"

Objection 8: "We need to talk to our partner/board/spouse"

Response: "Of course! Who else is involved in this decision?"

[They explain]

"Would it be helpful if I presented to everyone at once? I can explain the technology and answer their questions. That way everyone hears the same information and we can address all concerns together. When could we get everyone together for 20 minutes?"

Alternative: "What questions do you think they'll have? Let me help you answer those now so you have all the information you need."

Objection 9: "We can't afford downtime for the transition"

Response: "I completely understand—that's why our implementation is designed for zero disruption. Here's how we do it:

1. We monitor and support your existing setup first
2. We make changes during off-hours or weekends
3. We migrate services in phases, not all at once
4. We thoroughly test before switching over
5. Your team won't even notice most changes

One client told us: 'We didn't realize you'd switched everything over until you told us.' That's our goal— seamless transition. Would that address your concern?"

Objection 10: "We had a bad experience with another IT company"

Response: "I'm sorry to hear that. What happened?"

[Listen to their story]

"I completely understand your hesitation. Unfortunately, that's more common than it should be. Here's how we're different:

- [Address their specific issue]
- Dedicated account manager (not just a ticket number)
- Transparent communication
- No long-term contracts (month-to-month after initial period)
- Guaranteed response times
- Regular check-ins and reviews

How about we start with a 90-day trial? That gives you time to see how we operate without a long-term commitment. If we don't exceed your expectations, we part ways. Does that sound fair?"

Objection Handling Framework

Step 1: Listen Don't interrupt. Let them fully explain their concern.

Step 2: Acknowledge "I understand..." / "That makes sense..." / "I appreciate that..."

Step 3: Clarify "Can you tell me more about that?" / "What specifically concerns you?"

Step 4: Respond Address their actual concern with logic and examples.

Step 5: Confirm "Does that address your concern?" / "What else is holding you back?"

Step 6: Close Move forward: "So shall we get started?"

Module 9: Closing Techniques

When to Close

Buying Signals:

- Asking about implementation timeline
- Wanting to see the agreement
- Asking about specific features
- Discussing internally
- "What happens next?"
- Relaxed body language
- Taking detailed notes

Don't wait for perfect moment—ask for the business!

Closing Techniques

Assumptive Close: Act as if they've already decided.

"Great! Let's get the paperwork started. I'll send over the agreement today and we can begin next Monday. Sound good?"

Alternative Close: Give them options (both lead to yes).

"Would you prefer to start with the Professional or Premium package?"

"Should we schedule the assessment for Thursday or would next Tuesday work better?"

Summary Close: Recap benefits, then ask.

"So we've established that you need better security, 24/7 support, and predictable costs. Our Professional Plan gives you all of that for $2,800/month. Shall I get the agreement prepared?"

Urgency Close: Create legitimate urgency.

"We have availability to start next week, but our schedule fills up fast. If we can get the agreement signed by Friday, I can block out time for your implementation. Does that work?"

Trial Close: Test the waters throughout conversation.

"If we could solve [problem] for [price], would you move forward?"

"Does this sound like what you're looking for?"

"Are we on the right track?"

Direct Close: Simply ask for the business.

"Based on everything we've discussed, I think we're a great fit. Are you ready to get started?"

Ben Franklin Close: Pros/cons list.

"Let's list the pros and cons of moving forward. [Create list—pros should outweigh cons]. Based on this, what makes sense?"

Puppy Dog Close: Let them try it.

"How about a 90-day trial? You can experience our service with no long-term commitment. If we don't exceed expectations, we part as friends. What do you say?"

After They Say Yes

1. **Confirm the Decision:** "Excellent! I'm excited to partner with you."

2. **Set Expectations:** "Here's what happens next: I'll send over the agreement today. Once signed, we'll schedule your onboarding call and begin monitoring your systems within 48 hours."

3. **Send Agreement Immediately:** Strike while the iron is hot. Don't wait.

4. **Schedule Next Steps:** Book the onboarding call right away.

5. **Thank Them:** "Thank you for trusting us with your technology. We won't let you down."

When They Say No

1. **Understand Why:** "I appreciate your honesty. Can I ask what led to your decision?"

2. **Address Final Concerns:** One last attempt to overcome objections.

3. **Leave Door Open:** "I understand. Can I stay in touch? Situations change, and I'd love to help if your needs change."

4. **Ask for Referrals:** "I completely respect your decision. Do you know anyone else who might benefit from our services?"

5. **Follow Up:** Add to nurture campaign. Check back in 3-6 months.

Module 10: Account Management & Growth

Client Onboarding

First 30 Days:

Week 1:

- Kickoff call with client
- Deploy monitoring tools
- Set up help desk access
- Document current state

Week 2:

- Address any critical issues
- Begin regular maintenance
- Train users on support process
- Schedule regular check-ins

Week 3:

- Review initial findings
- Optimize configurations
- Implement quick wins
- Gather feedback

Week 4:

- 30-day review meeting
- Ensure satisfaction
- Discuss medium-term projects
- Ask for referral

Growing Account Value

Quarterly Business Reviews (QBRs):

- Review metrics (tickets, uptime, etc.)
- Discuss business changes
- Recommend improvements
- Present new services

Identify Upsell Opportunities:

- Security upgrades
- Cloud migrations
- Hardware refreshes
- Additional services
- Training programs

Account Expansion:

- New locations
- More users
- New services

- Project work

Client Retention

Why Clients Leave:

- Poor communication
- Slow response times
- Problems not resolved
- Feeling taken for granted
- Better offer elsewhere

Retention Strategies:

- Regular communication
- Proactive problem-solving
- Exceed expectations
- Show appreciation
- Provide continuous value

Warning Signs:

- Complaints increasing
- Slow payment
- Reduced engagement
- Shopping around
- Key contact left

Win-Back Actions:

- Schedule face-to-face meeting
- Address concerns immediately
- Offer incentives
- Demonstrate value
- Rebuild relationship

Referral Generation

Best Times to Ask:

- After successful project
- During QBR when showing value
- When client expresses satisfaction
- After resolving major issue

How to Ask: "We grow through referrals from satisfied clients like you. Who do you know that might benefit from the same peace of mind you're experiencing?"

Make It Easy:

- Provide referral cards

- Offer referral bonus
- Make introduction yourself
- Thank them genuinely

Referral Incentive Ideas:

- Account credit ($500)
- Charitable donation in their name
- Gift cards
- Free services/upgrades
- Recognition/appreciation

Sales Tools & Resources

CRM Usage

Required Information:

- Company name and details
- All contacts (names, titles, numbers, emails)
- Source (where they came from)
- All interactions (calls, emails, meetings)
- Stage in sales pipeline
- Next action and due date
- Opportunity value
- Notes from every conversation

Daily CRM Habits:

- Log all activities immediately
- Update deal stages
- Set follow-up tasks
- Review pipeline
- Clean up data

Sales Collateral

Materials You Should Have:

- Company overview one-pager
- Service menu/pricing guide
- Case studies
- Testimonials
- Assessment checklist
- Proposal templates
- Contract templates
- Business cards
- Leave-behind materials

Technology Stack

Tools You'll Use:

- CRM system (HubSpot, Salesforce, etc.)
- Email (with tracking)
- Calendar (for scheduling)
- LinkedIn Sales Navigator
- Phone system
- Document management
- E-signature software
- Video conferencing

Key Performance Indicators (KPIs)

Activity Metrics

- Calls made per day: 30-50
- Emails sent per day: 50-75
- LinkedIn connections: 10-15/day
- Networking events: 2-4/month
- Discovery calls: 5-8/week
- Assessments: 3-5/week
- Proposals sent: 2-4/week

Results Metrics

- Close rate: 30-40%
- Average deal size: $1,500-3,000 MRR
- Sales cycle length: 30-60 days
- New MRR per month: $10,000-20,000
- Pipeline value: 3-5x monthly quota
- Customer acquisition cost: <$1,000

Quality Metrics

- Response time to leads: <1 hour
- Follow-up rate: 100%
- Proposal-to-close time: <2 weeks
- Customer satisfaction: 9+ NPS
- Referral rate: 20%+ of new business

Success Habits

Daily Routine

Morning (8:00-10:00 AM):

- Review calendar and priorities
- Check and respond to urgent emails
- Warm-up calls (existing prospects)
- Cold calling (fresh mindset)

Mid-Day (10:00 AM-12:00 PM):

- Scheduled discovery calls
- Proposal preparation
- Meetings and assessments

Afternoon (1:00-3:00 PM):

- Follow-ups
- More cold calling
- Prospecting and research
- CRM updates

Late Afternoon (3:00-5:00 PM):

- Send proposals
- Schedule next day
- Final follow-ups
- Administrative tasks

Weekly Goals

Monday:

- Plan the week
- Set priorities
- Review pipeline
- Reach out to stalled deals

Tuesday-Thursday:

- Maximum activity days
- Focus on calls and meetings
- Advance opportunities

Friday:

- Follow up on week's proposals
- Clean up CRM
- Plan next week
- Submit reports

Continuous Improvement

Learning:

- Read industry news daily

- Take training courses
- Shadow successful colleagues
- Practice pitch regularly
- Stay current on technology

Self-Assessment:

- Review call recordings
- Analyze win/loss reasons
- Track metrics weekly
- Seek feedback from manager
- Adjust approach based on results

Final Assessment

Knowledge Check

1. What is Badger Technologies' 30-second elevator pitch?

2. Name the 5 stages of the sales funnel.

3. What are the 4 elements of BANT qualification?

4. List 5 questions you'd ask in a discovery call.

5. What are 3 critical security issues to look for in an assessment?

6. How do you handle the objection "It's too expensive"?

7. What's the difference between an assumptive close and a trial close?

8. When is the best time to ask for referrals?

9. What metrics should you track daily?

10. What are 3 buying signals to watch for?

Role-Play Scenarios

Scenario 1: Cold Call Call a dental practice about IT services. The receptionist answers.

Scenario 2: Discovery Call Conduct a discovery call with a 25-person law firm concerned about security.

Scenario 3: Objection Handling Prospect says they're happy with current IT company but it's clearly not working well.

Scenario 4: Closing You've presented a proposal to a manufacturing company. Close the deal.

Scenario 5: Referral Request Ask a happy client for referrals during a QBR.

Course Completion

Congratulations! You've completed the Sales & Client Acquisition Specialist Training.

Next Steps

1. **Shadow experienced sales team members**
2. **Practice your pitch and objection handling**
3. **Start building your prospect list**
4. **Set up your CRM and tools**
5. **Begin making calls!**

Remember

- Selling is helping, not pushing
- Rejection is normal—stay positive
- Activity leads to results
- Relationships matter more than transactions
- Always be learning and improving

Questions?

Contact your sales manager or team lead for:

- Clarification on any concepts
- Help with specific situations
- Coaching and feedback
- Advanced techniques

This training material is proprietary to Badger Technologies and intended for internal use only.