### \*\*Consultative Selling Reference: Cybersecurity Services & GRC Platform\*\*

\*\*Designed for SMEs (FinTech, Startups, REITs, Education, Government, etc.)\*\*

\*Compartmentalized for RAG Search | Junior Sales Team Use\*

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### \*\*A) Overview of Consultative Sales\*\*

\*\*Goal:\*\* Build trust, diagnose needs, and co-create solutions.

\*\*Key Principles:\*\*

1. \*\*Listen First:\*\* Focus 70% on understanding the client’s business, risks, and compliance gaps.

2. \*\*Educate, Don’t Pitch:\*\* Position yourself as an advisor (e.g., "Many FinTechs use SOC 2 to unlock enterprise contracts").

3. \*\*Tailor Solutions:\*\* Align services (e.g., vCISO, penetration testing) to industry-specific risks:

- \*\*FinTechs:\*\* Data theft prevention for PCI compliance.

- \*\*Education:\*\* FERPA/HIPAA alignment.

- \*\*Startups:\*\* SOC 2 for investor/partner requirements.

4. \*\*Leverage GRC Platform:\*\* Highlight how it ensures consistency, reduces manual work, and accelerates compliance.

\*\*5-Step Process:\*\*

1. Discovery → 2. Solution Design → 3. ROI Demo → 4. Objection Handling → 5. Close & Expand.

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### \*\*B) Sales Meeting Questions\*\*

\*\*Goal:\*\* Uncover pain points, budget, timeline, and decision-making process.

\*\*Industry-Tailored Examples:\*\*

- \*\*All SMEs:\*\*

- \*"What compliance frameworks are your enterprise customers demanding?"\*

- \*"Who handles security today? What gaps keep you up at night?"\*

- \*\*FinTech/Insurance:\*\*

- \*"How do you manage third-party risk for partners/banks?"\*

- \*\*Startups:\*\*

- \*"Are investors requiring SOC 2 before your next funding round?"\*

- \*\*Government/Education:\*\*

- \*"What’s your timeline for meeting [NIST/CMMC] requirements?"\*

\*\*Pro Tip:\*\* Ask, \*"If compliance weren’t an issue, what’s the #1 security problem you’d fix?"\*

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### \*\*C) Compliance Service Breakdown\*\*

\*\*SOC 2 vs. ISO 27001\*\*

| \*\*Aspect\*\* | \*\*SOC 2 Type 1\*\* | \*\*SOC 2 Type 2\*\* | \*\*ISO 27001\*\* |

|-------------------|------------------------|------------------------|------------------------|

| \*\*Purpose\*\* | Design assessment | Operational effectiveness | Holistic ISMS certification |

| \*\*Timeline\*\* | 3-6 weeks | 6-12 months | 6-18 months |

| \*\*Best For\*\* | Startups needing quick validation | Growth-stage companies | Global/govt contracts |

| \*\*Remediation\*\* | Fix control design gaps | Prove sustained compliance | Build entire ISMS |

\*\*Key Messaging:\*\*

- \*"Start with Type 1 to close immediate gaps, then Type 2 for long-term trust."\*

- \*"ISO 27001 + SOC 2 = 80% overlap—we bundle them for efficiency."\*

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### \*\*D) Objection Handling Strategies\*\*

\*\*Common Objections & Responses:\*\*

1. \*\*"We’re too small for this."\*\*

- \*"82% of SMEs lose deals without compliance. Our vCISO scales to your size."\*

2. \*\*"It’s too expensive."\*\*

- \*"Penetration testing costs 10x less than a breach. We offer phased payments."\*

3. \*\*"No internal expertise."\*\*

- \*"That’s why our GRC platform automates 50% of the work, and vCISO guides you."\*

4. \*\*"We’ll do it later."\*\*

- \*"REITs/FinTechs face $50K+/day fines for delays. Let’s start with a $2k gap assessment."\*

\*\*Pro Tip:\*\* Use industry stats (e.g., \*"60% of startups fail audits without prep"\*).

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### \*\*E) Demonstrating Value & ROI\*\*

\*\*ROC Framework:\*\* \*\*R\*\*isk Reduction, \*\*O\*\*pportunity Enablement, \*\*C\*\*ost Savings.

\*\*Industry Examples:\*\*

- \*\*Risk:\*\* \*"Vulnerability assessments cut breach risk by 70% (IBM)."\*

- \*\*Opportunity:\*\* \*"FinTech X won $500k contracts post-SOC 2."\*

- \*\*Cost:\*\* \*"GRC platform reduces audit prep from 6 months to 8 weeks."\*

\*\*GRC Platform Value Props:\*\*

- \*\*Quality:\*\* Standardized templates for policies/evidence.

- \*\*Consistency:\*\* Auto-reminders for control maintenance.

- \*\*Engagement:\*\* Client portal for real-time progress tracking.

\*\*ROI Calculator Snippet:\*\*

> \*"Compliance Cost ($50k) vs. Revenue at Risk ($500k if non-compliant) = 10x ROI."\*

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### \*\*F) Meeting Etiquette\*\*

\*\*Best Practices:\*\*

- \*\*Pre-Meeting:\*\* Research industry compliance mandates (e.g., NYDFS for FinTechs).

- \*\*During Meeting:\*\*

- First 10 mins: Build rapport (e.g., \*"How’s the startup funding environment?"\*).

- Share camera to show engagement.

- Use simple analogies (e.g., \*"SOC 2 is like a health checkup for security"\*).

- \*\*Avoid:\*\* Jargon (say "audit readiness" vs. "SSAE 18").

\*\*Industry-Specific Tips:\*\*

- \*\*Government:\*\* Emphasize familiarity with RFP processes.

- \*\*Education:\*\* Highlight FERPA experience.

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### \*\*G) Followup Planning\*\*

\*\*Post-Meeting Actions:\*\*

1. \*\*Within 24h:\*\* Send meeting summary + relevant content (e.g., SOC 2 checklist for SaaS).

2. \*\*Day 3:\*\* Share case study from client’s industry.

3. \*\*Day 7:\*\* Call to propose next steps (e.g., free gap assessment).

4. \*\*Day 14:\*\* Invite to webinar/demo.

\*\*Stuck Deal Followup:\*\*

- \*"Noticed [Competitor] had a breach last week—our tabletop exercise could prevent that."\*

\*\*Expansion Triggers:\*\*

- Client mentions: M&A, new regulations, or enterprise deals.

- \*\*Script:\*\* \*"Since we helped with SOC 2, penetration testing would protect your new product launch."\*

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### \*\*H) Contracting Steps\*\*

\*\*4-Step Closing Process:\*\*

1. \*\*Proposal:\*\* Bundle services (e.g., "SOC 2 Prep + GRC Platform Access: $15k").

2. \*\*Negotiation:\*\* Offer discounts for annual commitments.

3. \*\*Signatures:\*\* Use e-signature tools (e.g., DocuSign).

4. \*\*Onboarding:\*\* Kickoff call <48h post-signature.

\*\*Key Clauses for SMEs:\*\*

- \*\*Flexibility:\*\* Month-to-month vCISO options.

- \*\*Outcomes:\*\* "Guaranteed SOC 2 Type 1 readiness in 90 days."