Trainer says:
"Take 2 minutes and list your top 3 prospecting sources today. Now circle one source you're *under-utilizing* — something you know could produce results if you leaned in more. That's your growth opportunity."

- Small group/share (if live).
- Chat box (if webinar).

5:30–6:00 | Transition to Next Step
Trainer says:
"Now that you know where to look for prospects, the next step is about rhythm — creating a consistent formula so you're not just planting seeds once in a while, but building a pipeline that's always growing."

📝 Visual Aid (Slide/Table)

Title: *Prospecting Sources — B2B vs. B2C*

Source Type	B2B Example	B2C Example
Referrals	Client intro to VP	Friend recommends product
Networking	Trade show booth	Local community fair
Social	LinkedIn outreach	Instagram DMs
Inbound	Webinar signup	Website opt-in
Cold Outreach	Email + Call mix	Door-to-door / Social cold DM

Step 4: The Prospecting Formula (Activity Mix) (5–6 min)

Big Picture (What & Why)

- **Definition:** The Prospecting Formula is a structured rhythm of daily actions that ensures your pipeline never runs dry.
- **Why it matters:**
  - Eliminates "feast or famine" sales cycles.
  - Creates predictability and momentum.
  - Builds confidence — you know your activity will create future opportunities.

🧭 Trainer Flow

0:00–0:45 | Open
Trainer says:
"Prospecting isn't about luck. It's about rhythm. If you plant seeds every day, something will always be growing in your pipeline. If you only plant when you feel like it, you'll always be chasing."

The 5x5 Rule & Sequencing

📖 Definition

The 5x5 Rule = *5 new touches per day × 5 days per week = 25 new touches weekly.*

- **Small enough** to be realistic.
- **Big enough** to create compound results.
- **Keeps you consistent** even in busy weeks.

❌ Common Misconception

Trainer says:
"When we say 5x5, we don't mean calling the same 5 people every day or just sending 5 emails and calling it a week. That's activity in a silo, not prospecting."

Framing 5x5 + Sequencing in the Training

Step 1: Define the Difference

- **Touches = How** you engage.
  Examples: call, email, LinkedIn message, voicemail, DM, referral ask.
- **Sequence = When + What** you say.
  Examples: Day 1 intro call → Day 2 follow-up email → Day 4 LinkedIn connect → Day 7 phone call with value-add → Day 10 case study email → Day 14 "check-in" call.

Trainer Line:
"Touches are the vehicles, sequences are the roadmap. Together, they keep you from being random and help you stay relevant."

Step 2: Put Them Together in 5x5

- The **5x5 rule** ensures consistency → you're always planting new seeds.
- **Sequencing** ensures quality → each seed is watered in the right order.
- Combined:
  - Each day, you complete 5 *new touches*.
  - Those touches might belong to *different sequences* (some at Day 1, some at Day 7, etc.).
  - Over time, you're managing dozens of sequences in motion, not just "calling the same 5 people."

Step 3: Avatar-Based Sequences

Example: Analytical B2B Buyer

- **Day 1:** Intro call (data-focused).
- **Day 2:** Email with industry benchmark.
- **Day 4:** LinkedIn connect.
- **Day 7:** Voicemail with new insight.
- **Day 14:** Email case study.

Example: Relationship-Driven B2C Buyer

- **Day 1:** Intro via referral.
- **Day 3:** Coffee invite or phone call.
- **Day 5:** Text with client success story.
- **Day 10:** Follow-up call.
- **Day 15:** Social media DM.

Step 4: Research on Spacing (Cadence Best Practices)

Most modern sales studies (Outreach, Gong, SalesLoft, HubSpot) agree:

- **7–9 touches per prospect over 2–3 weeks** is the sweet spot.
- **Spacing of 2–3 days** between touches feels persistent without being annoying.

- **Channel-switching increases response** (e.g., call → email → LinkedIn works better than 3 emails in a row).
- **Follow-up beyond 14 days** should continue with lighter touches (value-add content, checking in at milestones, not just "did you get my last message?").

Trainer Line:
"Think of sequencing like watering a plant — too much too soon drowns it, too little too late dries it out. A steady rhythm with different nutrients (channels, messages) keeps it growing."

🧭 Examples by Avatar

1. Analytical B2B Buyer (Tech-Savvy Manager)

- Day 1: LinkedIn request, email, comment on post, call/voicemail, referral ask.
- **Trainer Note:** Mix shows professionalism + insight → builds trust with efficiency-driven buyer.

2. Relationship-Driven B2B Buyer (Operations Director)

- Day 1: Warm intro, success-story email, call, LinkedIn engagement, invite to event.
- **Trainer Note:** Connection + stories resonate most.

3. B2C Lifestyle Buyer (Young Parent)

- Day 1: Instagram follow, DM, value email, call, testimonial text.
- **Trainer Note:** Authenticity + social proof are key.

4. B2C Price-Conscious Buyer (Budget Shopper)

- Day 1: Promo text, event invite call, comparison email, product DM, referral ask.
- **Trainer Note:** Needs reassurance of value → consistent touches reduce skepticism.

⚖️ Why Sequencing + 5x5 Works

- **Diverse touches** = higher chance of connection.
- **Different formats** appeal to multiple learning/buying styles.
- **Multiple channels** show persistence without feeling spammy.
- **Systematic coverage** means every Avatar prospect gets attention, not just the "easy" ones.

Trainer Line:
"If you only rely on one channel — like email — you'll miss 70% of your opportunities. 5x5 ensures you're everywhere your buyers are, while sequencing ensures *every prospect gets worked systematically.*"

📊 Visual Aid Suggestion

- **Graphic:** Calendar grid (5 days, 5 touches) → arrows showing "sequence applied across many prospects."
- Caption: *"5x5 is the rhythm. Sequencing is the system."*

Activity Option (5 min)

Exercise: Build Your 5x5 Day

- Participants choose one Buyer Avatar (from Module 1).
- Write down 5 specific touches across different channels they could execute tomorrow.
- Share 1–2 examples with group.

📝 Visual Aid (Slide/Worksheet)

- Title: *The 5x5 Rule = 5 New Touches × 5 Days × Multiple Channels*
- Graphic: 5 rows (touches) × 5 columns (days) grid.
- Color-code: Call, Email, Social, Referral, In-Person.

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2) B2B vs. B2C Activity Mix (2 min)

- **B2B:**
  - Mix = LinkedIn outreach, email sequences, referral asks, networking touches.
  - Lower volume but higher personalization.
  - Example: 2 LinkedIn messages, 2 warm emails, 1 referral ask per day.
- **B2C:**

- Mix = social DMs, community events, referral asks, phone calls.
- Higher volume but faster cycles.
- Example: 3 social DMs, 1 phone call, 1 referral ask per day.

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3) Balance: Quality + Quantity (1 min)

- Too much **quantity** = spam.
- Too much **quality** = perfection paralysis.
- The formula creates balance — enough touches to move the needle, without sacrificing personalization.

Trainer Line:
"Think of it like gardening: if you scatter thousands of seeds with no care, most won't grow. But if you only plant one perfect seed a week, you'll starve. The formula balances reach with relevance."

5:15–5:45 | Transition
Trainer says:
"You now have your rhythm. Next, we'll work on crafting *what to actually say* in those messages — so your seeds take root instead of getting ignored."

📝 Visual Aid (Slide/Handout)

Title: *The Prospecting Formula — 5x5 Rule*

- Graphic of a calendar with 5 boxes per day checked off.
- Tagline: *"25 seeds planted weekly = a pipeline that always grows."*

📄 Worksheet Tie-In

Prospecting Tracker Worksheet (Daily & Weekly)

- Daily: Calls, emails, LinkedIn/social, referrals, total new prospects.
- Weekly reflection questions: "What source worked best? What message landed?"
- Monthly snapshot: Total touches → Total qualified leads.

Step 5: Crafting Outreach Messages (7–8 min)

- **Formula:** Relevance → Value → Clear CTA.
- B2B example: "Saw your company launched X — curious if Y is a current priority?"
- B2C example: "Hey [Name], since you loved [product], we thought you'd want first access to [new offer]."

Exercises (25 min total)

1. **Prospecting Source Map** (10 min).
2. **Outreach Role-Play** (15 min).

Wrap-Up (3 min)

"Prospecting is about rhythm and relationships. With the right mindset, consistent trust-building, and steady activity, you'll always have a healthy pipeline."

Transition to Activity (2 min)

- *Trainer says:*

  "Prospecting is where discipline meets creativity. Let's put this into practice with a structured outreach activity."

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2. Participant Exercises

Exercise 1: Prospecting Source Map (10 min)

- Participants list 3–5 prospecting sources they aren't fully leveraging.
- Group shares: identify 1 new source they'll commit to using this week.

Exercise 2: Outreach Message Role-Play (15 min)

- Participants draft a 3-sentence outreach message (call script, email, or LinkedIn).
- Pair up and role-play delivering it. Partner provides feedback on clarity and value.

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3. Quiz (Knowledge Check)

1. What is the primary goal of prospecting?
   - a) To close deals immediately
   - b) To build and maintain a healthy pipeline ✅
   - c) To practice conversations
2. Which of the following is NOT a strong source of new prospects?
   - a) Referrals
   - b) Networking events
   - c) Ignoring LinkedIn ✅
3. True or False: A prospecting message should always include a clear next step.
   - **Answer:** True

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4. References & Resources

- *Fanatical Prospecting* (Jeb Blount).
- LinkedIn Sales Navigator tutorials.
- CRM pipeline management best practices.

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5. Visual Aids

- Funnel diagram showing *Prospecting → Discovery → Solution → Close*.
- Outreach Message Framework (Relevance → Value → Call to Action).
- Daily Prospecting Tracker (5x5 rule visual).

Wrap-Up (3 min)

- *Trainer says:*

  "Prospecting is about rhythm. If you plant enough seeds, consistently, you'll always have opportunities to harvest. Next, we'll move into Discovery — how to take those prospects and uncover their real needs."

Prospecting Tracker Worksheet

Chapter 5.3 – Engage: Prospecting

Why It's Important

Think of prospecting like planting seeds in a garden:

- 🌱 **Seeds = Touches:** Every outreach is a seed. Not every seed grows, but the more you plant, the greater your harvest.
- ⏳ **Consistency = Growth Rhythm:** If you plant once and stop, your garden goes bare. The 5x5 ensures you always have something growing.

- 📈 **Pipeline Health = Business Health:** A steady flow of new prospects means you're never "waiting" on deals. It reduces stress and builds confidence.
- 🎯 **Balance of Quantity + Quality:** 25 touches weekly is manageable and sustainable — enough to move the needle without sacrificing personalization.
- 🔄 **Compound Effect:** 25 new prospects per week = 100+ per month = 1,200+ per year. Even a **10% conversion rate** means over **100 new clients** annually.

Practical Tips

- Set a **prospecting time block** (e.g., 9–10am daily). Protect it like an appointment.
- Mix your methods: don't rely only on calls or email — spread seeds across channels.
- Track outcomes: Which seeds sprouted (responses)? Which stayed dormant? Learn and adjust.
- Celebrate wins: Even small responses are signs of growth.

"Think of your sales success like a harvest. You don't eat the seed you plant today — you wait, water, and nurture. The 5x5 rule isn't about instant results, it's about building a rhythm that ensures your pipeline is always producing."

Instructions

Use this worksheet to track your daily and weekly prospecting activities. The goal is consistency: plant enough seeds so you always have opportunities growing in your pipeline.

Step 1: Daily Prospecting Goals (5x5 Rule)

- **Make 5 new outreach attempts per day** (calls, emails, LinkedIn, etc.)
- **5 days per week** = 25 new touches weekly

✓ Adjust the numbers if your industry or role requires more volume.

Daily Tracker (Sample Week)

Day	Calls Made	Emails Sent	LinkedIn / Social	Referrals Asked	Total New Prospects	Notes / Wins
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						

Step 2: Weekly Reflection

1. Did I meet my 5x5 goal? (Yes/No)

2. What source brought me the most promising prospects this week?

3. What outreach message got the best response?

4. One improvement I'll make for next week is:

Step 3: Monthly Snapshot

At the end of each month, total your prospecting activity:

- Total Calls Made: _____
- Total Emails Sent: _____
- Total Social Connections: _____
- Total Referrals Asked: _____
- Total New Prospects: _____

- Total Qualified Leads Created: _____

✅ This worksheet works well as:

- A **printable handout** for workshops
- A **fillable PDF** for coaching clients
- Or a **spreadsheet template** for teams tracking together

Chapter 5.3 – Module 2b: EXPLORE – Discovery: Becoming a Problem Solver

Pre-Training Diagnostic Quiz: Discovery (Bridge Model)

Instructions

- Rate yourself on each statement using the scale:
  1 = Strongly Disagree | 2 = Disagree | 3 = Neutral | 4 = Agree | 5 = Strongly Agree
- Total possible score: **50 points**

Part 1: Current State (Understanding Today's Reality)

1. When engaging buyers, I consistently ask questions that help me understand the buyer's current process or situation.
2. I am skilled at identifying what is working well and what is not in their current state.

Part 2: Desired State (Uncovering the Ideal Outcome)

3. I can help buyers articulate what their "ideal success" looks like.
4. I guide conversations to reveal both measurable goals and emotional drivers of success.

Part 3: Obstacles (Identifying Barriers to Progress)

5. I uncover challenges, frustrations, and risks that prevent buyers from reaching their goals.
6. I can surface hidden obstacles (fear of change, resistance, politics) as well as surface ones (budget, resources).

Part 4: Impact (Defining the Value of Change)

7. I connect solving the buyer's problem to tangible business outcomes.
8. I create urgency by showing the cost of inaction.

Part 5: Discovery Confidence

9. I feel confident that my discovery process consistently reveals the buyer's *real* problems and priorities.
10. I am viewed as a problem solver, not just a salesperson.

Scoring Rubric (Bridge Model)

🌱 **10–19 points: Struggling Stage**

- You focus more on pitching than engaging.
- Focus: Build curiosity and slow down to truly listen.

🌿 **20–29 points: Building Stage**

- You ask some good questions, but discovery lacks depth.
- Focus: Expand your toolkit — go deeper into Desired State and Obstacles.

🌳 **30–39 points: Growing Stage**

- You run strong discovery conversations but miss chances to uncover hidden barriers or emotional drivers.
- Focus: Sharpen Impact questions and practice layered probing.

🌟 **40–50 points: Thriving Stage**

- You are a trusted guide who engages buyers in problem-solving conversations.
- Focus: Teach others and refine advanced questioning techniques.

Module 2b: Explore: Discovery – Becoming a Problem Solver with The Bridge Model

Purpose

Equip sales professionals to master discovery as problem solvers — uncovering where buyers are, where they want to be, what's in the way, and what's at stake.

Trainer Script (Bridge Emphasis)

- *Trainer says:*

  "This quiz is designed around the Bridge Model. Your role in sales is not to push a product, but to build a bridge for your buyer — from their Current State to their Desired State, across the Obstacles, toward the Impact they care about most. This diagnostic shows you how well you're already walking buyers through that journey."