

Standard Operations Procedures

Sales & Marketing EXAMPLE

Operations Procedures	Description of Tasks	Timeline
Sales Rep Set Up Phase	On Boarding Document Process Diagram HERE	1st Week
Study - Sales Process	Process for Sales & Offline Efforts HERE IS SALES PROCESS	
Study Content	Case Studies & Presentations & VSLs See This Content FOLDER HERE	
LinkedIn - Build Profile	Profile Optimization: Create A Stellar LinkedIn Profile	
LinkedIn - Connections	Request Download of current LinkedIn Connections In order to analyze partner//customer potential. Use This Template	
LinkedIn - Sales Navigator	Sign Up For Sales Navigator. They offer a 30 day Free Trial HERE An Overview of Daily/Weekly/Monthly Tasks are HERE	
Email - Warm Up Alias	Instructions are HERE	
Email - Set up DKIM, DMARC, SPF	This is a critical part of the email success. DKIM SPF DMARC	
Internal Systems	Get set-up with CRM, Asana, Slack, Etc,	
Zoom	Go HERE . Add name, meeting description, branding, etc.	
Calendly	Go To Calendly . Set up for 45 minute sessions. Add Zoom to your personal meeting ID to the event location. In case of team members, use the Round Robin + Team feature. Emed the calendly link	

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CRM + Email Auto responder	CRM/Close.io Cheat Sheet Is HERE	
Marketing Foundation	Done In Advance of Outbound Prospecting	2nd Week
What niche (sub niche) is Rep going to Target?	Map Message and Content to Target Persona Niche. Market - Message Resonance Hypothesize Niche/Person & Problem Solved, Expertise. PERSONA + MESSAGING WORKBOOK	
Audit of Existing Content	Build your individualized "Thought Leader" Content: (Write New or Repurpose old Content) Perform an audit to see what you have: Assets, Case Studies, Testimonials, etc. Find Workbook HERE	
Personalized Content Created specific to Rep & Niche	Create 3-5 personalized pieces, sales letters (blog articles. Can be: Video, written case studies, interviews, training videos. Framework for Copyright Process for Article/Post/Content/Sales	
Schedule + Publish Content	Publish an expert "Thought Leader" Content Calendar. Find Workbook HERE (2nd Tab in Workbook)	
Create Expertise + Thought Leader Material	Thought Leadership & Expertise -VSL Building Create custom video sales letter/webinar using template. VSL Template	
Prospecting Phase - Pre-Call	Done In Advance of Outbound Prospecting	3rd Week
Sales Tracking	Set up sales tracking sheet HERE	
LinkedIn Prospecting Tracking Sheet	Create Tracking for Outreach Thought Leader Target Audience Tracker (tab1 + 2)	

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Prospecting Process	Map out Message Sequence for LinkedIn/Sales. Record Sent, Opens, replies, leads, demos. Send a minimum of 25 personalized outbound messages per day for 30 days in a row. Book a minimum of 5 appointments per week Nav Prospecting - LinkedIn And Cold Email + Cold Calling	
Create COLD Emails	See Cold Email Template HERE.	
Prospecting Phase - Calling	Discovery and Strategy Calls Outline	4th Week
Cold Call	Pepper in Cold Calling to Hit on 3 Fronts, LinkedIn, Email and Phone. Do 10 Cold Calls per day Find Script HERE	
Perform Discovery Calls	15 Min Discovery Call Example Script These are short 15 minute calls that route to 45 -60 min Full Strategy Session Call	
Prior to Strategy + Demo Call	Email & Content Before Demo	
Strategy Session Sales Call Script	Find Sales Script HERE	
Sales Deck Presentation	Example Sales Deck is HERE	
Email Sequence	Create an educational email sequence for people who did not sign up, drop them into sequence.	