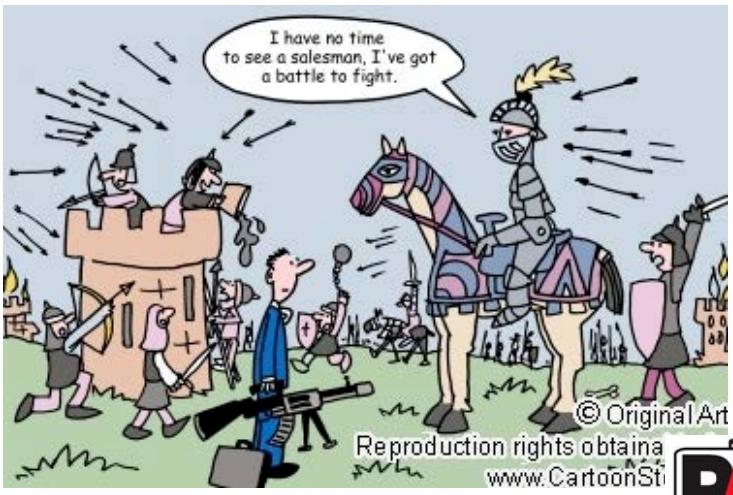
Making a strong move towards a sale!

October 2nd

Power Appointment Setting

Our challenge



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Speaker Bio

Mike Adams

- 30+ Years in Copier Printer Industry
- Former Equity Partner at $28 Million Dealership in California
- Former Executive VP of Sales and Marketing Southern California Dealer
- Founder/CEO of a Company that specializes in Business Development, Appointment Setting for MFP's, MPS and MNS Providers
- MPS and MNS Expert; Numerous National Webinars
- Trained over 300 Independent Dealers and Manufacturers and over 5000 Sales Representatives on-site
- MBA from University of Southern California

Making a strong move towards a sale!

Agenda

- Selecting your potential prospects
- Business records and important criteria
- Key contacts and pre-call planning
- Outbound call opening benefit statement
- Qualifying the meeting
- First meeting preparation and goals
- First meeting opening and closing for next meeting
- Wrap up and questions

Selecting your prospects

Markets

- SMB, (Small to Medium Size Businesses)
  - 50-500 employees
  - 20-100 Printers*, 2-20 MFPs
  - $3,500,000 - $40,000,000 in annual revenue**
  - Paper Intensive Markets; Legal, Mortgage, Accounting, Real Estate
  - Single Location; Occasionally Multiple Locations
  - Simple Managed Services and Software Opportunities

- Large or Enterprise Businesses
  - 500+ employees
  - 100+ Printers*, 20+ MFP's
  - $40,000,000+ in annual revenue**
  - Multiple Locations, Nationally as well as Globally
  - Enterprise Managed Services and Software Solutions Opportunities

* (Typical average is 5 employees per printer)
** (Annual revenue = $40K Salary/Employee Average
Payroll is typically between 40 to 55% of total sales)

Business records and important criteria

Criteria

- Owner or VITO at company
- Finance Executive; VP Finance, CFO or Controller
- Information Services Executive, CIO, CTO or Director of IT
- Company address information
- Vertical Market; NAICS Code
- Number of employees
- Annual Sales, Credit Rating
- Location type; headquarters, branch, profit, or non profit

Sample business records

Sample List

Most Senior Executive Name	Most Senior Executive Title	Finance Executive Name	Finance Executive Title	Information Systems Exec Name	Information Systems Exec Title	Company Name	Address Line 1	City	ST	Zip	Phone	Emp	NAICS Desc	Web Site	Ownership	Credit Grade	Sales USD (mil)
Olga Caledonia	Executive Director	Bruce Mullen	Finance Executive	Khanh Tran	Information Technology	NATIONAL Fire Protection Association	1 Batterymarch Park	Quincy	MA	02169	617-984-7900	260	Other Social Advocacy Organizations	http://www.nfpa.org	Private Independent	A+	
Ron Parker	Vice President-Operations	Wayne Sparrow	Chief Financial Officer	David Smiley	Chief Information Officer	Copley Controls Corp	20 Dan Rd	Canton	MA	02021	781-828-8090	250	Electrical Equipment Manufacturing	http://www.copleycontrols.com	Private Subsidiary	A+	133.3
Phyllis Papani Godwin	Chairman & Chief Executive Officer	Mark Anderson; Ken Khan	Chief Financial Officer; Manager-Credit	Dave Bennett	Information Technology Director	Granite City Electric Supply Co	19 Quincy Ave	Quincy	MA	02169	617-472-6500	250	Electrical Apparatus and Equip., Wiring Supplies, and Related Equip. Wholesalers	http://www.granitecityelectric.com	Private Parent	A+	15.0
Katherine Chmiel	Chief Administrator	Sharon Porter; Allin Bond	Chief Financial Officer; Chief Financial Officer	Steve Cash; Bob Lima	Chief Information Officer; IT Executive	Massachusetts Hospital School	3 Randolph St	Canton	MA	02021	781-828-2440	250	Specialty (except Psychiatric and Substance Abuse) Hospitals		Private Subsidiary	A+	11.0

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Key Contact and Pre-call Planning

- **Key Contact**
  - VP Finance
  - CFO
  - VP of Operations
  - CIO
  - CTO
  - Controller
  - Director of IT
  - Director of Purchasing
- **Pre-call Planning**
  - Identification of "The Right Person or Persons"
  - Visit web-site to locate direct report
  - Verify decision making team
  - Create a WARM CALL

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Outbound call opening benefit statement

Cold Call:

If you don't have CFO's or CIO's name on business record:

Sales Rep: Hi does Mr./Mrs. (CEO's Name) still work out of this office?

Secretary: Yes, resistance….

Sales Rep: Great maybe you can help me; my name is (Your Name) and I was referred to your company and I'm not 100% sure Mr./Mrs. (CEO's Name) is the right person for me to talk to. Who I'm trying to reach is the person who runs your finance department; your CFO. Is that his/her position?

Secretary: No he's the president; Matt Miller is the CFO!

Sales Rep: Great! Can you transfer me to Mr. Miller

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Outbound call opening benefit statement

Warm Call

Sales Rep: Hi Mark. My name is (Your Name) with (Dealership Name) and I was referred to you by Joe Smith's Office. My company specializes in the (their industry); in Document Management. Our solutions are cost savings and security measures in the areas of printing and imaging and we are interested in your opinion on them.

The reason I'm calling is I am going to be very close to you this Friday, (or target appointment day), meeting with another client of mine at 11am, and I would like to come by for a brief introduction meeting with you either before at 9:30 or after lunch to briefly show you how we could potentially help you in this area! Is Friday at 9:30am good for you or would after lunch work better? (If not, be prepared to offer other dates and times).

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Qualifying Appointments

Questions

- OK, I just need to ask you a few quick questions and I'll get you off the phone, OK?
- We are all set to meet with you at your offices on Friday at 11am.
- My records show you're the CFO correct?
- Your address is _____ correct?
- When you have documents you need printed what are currently printing to? (HP laser printers?)
- How many printers do you have?
- Are you printing to anything else like tractor fed invoice printers or copiers?
- How many copiers do you have and what brand?
- Are your printers under any type of contract and if yes with who?
- I would like to send you an invitation in Outlook as a placeholder for the meeting; could I get your e-mail address?

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First meeting preparation and goals

Preparation

- Visit website
- Pre-plan rapport building

Goals

- What are future client's expectations?
- What are our expectations?
- How do we both win?

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First meeting goals; Prospect's, Sales Rep's

Prospect's

- Brief 15 minute informative meeting
- Don't bore me with to tears with product specs
- Don't try to "Sell Me"!

Sales Rep's

- Develop solid rapport with future client
- Do building/office walk though to locate assets and workflow
- Set up follow up meeting

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First meeting Rapport Building

Pre-meeting

- Visit web-site
- Locate Mission Statement
- Company awards and certifications

Reception area

- Company awards
- Civic memberships
- Décor and style

Contact's Office

- Family pictures
- College degree
- Sports teams and hobbies
- Attire

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First call opening statement and close for next meeting!

Opening Statement (after rapport building)

- Thanks Mark, I appreciate the opportunity to learn more about your company and how you run your business! I would like to ask you one more small favor before I go.
- Is there someone that can walk me through the facility and show me how you move information and manage documents? This will provide me with the information I need to assess how we can best assist your company…

Before you leave CFO's Office

- Thanks again Mark. Before I leave I would like to set up a brief follow up meeting the beginning of next week to discuss any opportunities we uncover. How does next Tuesday at 9am look?

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Facility walk through with assistant!

Opening Statement

- Thanks Jill, (assistants name). I really appreciate you helping me with this. It won't take long. If you could just show me where documents come onto the network, (i.e. scanners, copiers), and where they get printed when they come off the network, (i.e. copiers, printers and fax machines), I would appreciate it.

- I just need to ask the operator next to the device a couple of quick questions and we will be done, OK?

Questions

- How do you like this device?
- Is there anything you would change to make it better?
- How often to you put a ream of paper in it?

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Wrap up and questions?

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Contact Information

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