

SALES

prospecting

HOW TO PROSPECT YOUR IDEAL CLIENT

Utilize this instructional guide to find,
engage, & attract your ideal client
right into your sales pipeline.

3 golden tips

1

Genuine

Be genuine. Be YOU. You don't need to put on a show for the potential buyer - perfection is overrated. People can smell dishonesty a mile away. Rather, show up being exactly yourself. Use the words that come natural. Speak from the heart. By making genuine connections, you'll be able to go a lot further in the relationship & build trust. People buy from those they know, like, & trust. Authenticity is the only way.

2

Listen

Be slow to speak and quick to listen. There is nothing worse than a sales person who talks too much - not only is it annoying for the potential buyer, but it highlights ego, selfishness, & desperation. Show up to your potential buyer ready to listen. Ask open-ended questions and then stop talking. Wait for them to provide a response. Listen for opportunities to help them. This is your moment to help from the heart.

3

Confident

The sleazy & arrogant sales days are over. That being said, confidence is necessary to closing a deal. If you're not confident in what you're offering, then the customer won't be confident in buying from you. Learn the difference between confident & arrogant. An arrogant person is focused on themselves while a confident person uses their knowledge & experience to help others.

Choose from *these quick convo starters*

I notice you have ___, me too! What's yours like?

I love what you've done with ___. How did you come up with that?

You've built a fantastic ___. How long have you been doing it? What got you started?

So you're a ___ fan! Me too! Have you always enjoyed that?

The ___ industry is fascinating. What you got started in that?

Congratulations on ___! What an exciting time/thing! Any special plans to celebrate?

I noticed you mentioned ___. Can you tell me more about it?

I love that you asked ___ in the group. Thank you for being vulnerable. How was the response?

Thank you for sharing that recent article. I needed that! How did you stumble upon it?

I see that we have ___ friend in common. How do you know ___?

I've been following you for a while now & I love your posts. Your ___ is so adorable. Where did you find the ___?

Your recent post made me chuckle so hard. Thanks for sharing! Your spouse must have a strong sense of humor! Have you ever considered comedy for a side gig?!

You're impressive! How do you get it all done? Your content is amazing & your hair always looks freshly washed. #goals What's your secret!?

Hey friend! It's been so long since we've connected. I miss you! How's life treating you these days?

I see that you offer ___. I would love to know more about this. Can you tell me more about it?

You've been silent lately. How are you? Everything going alright?

Follow these steps when prospecting a potential customer

1

First

Get specific. Write their name down. Ensure that they match your previously defined ideal customer avatar.

2

Second

Engage with them on a platform that they "hang out" on. Begin with a conversation starter. Find out what they need.

3

Third

Offer something of value to them for free. Link to a blog, digital resource, recommend a book, etc. Give value.

4

Fourth

Wait a few days & then follow up. How'd that free value resource workout? Keep the conversation going & focus on them.

5

Fifth

Ask them for the opportunity. This is your call-to-action. Hop on a discovery call, try this item, here's a discount, join us, etc.

6

Sixth

Wait a few days & follow up again. Even if they didn't buy, ask how they are doing. Then, ask if they know anyone else who would benefit from your product/service.

Important *do's* & *don't's* for your sales approach

DO'S

DONT'S

✓ Make a personal connection by learning about their life. Look for ways to relate.	✗ Only talk about yourself and your life. Your problems are not important in this convo.
✓ Actively listen. Repeat what they say in your response before you pitch.	✗ Passively listen to them while brainstorming your pitch. Flow should be natural - not forced.
✓ Allow your feelings and passion to shine. It is GOOD to feel excited to help them.	✗ Hold back your excitement in fear that you'll sound too eager. Eager is not desperate.
✓ Confidently offer your product/service if you truly believe it will help them.	✗ Push your product/service when they don't express the need for it. That's a sleazy sale.
✓ Feel comfortable sharing your personal story of how this product/service changed your life.	✗ Start off the conversation talking about you. Wait for the natural right moment to create genuine connection.
✓ Respect their time by asking for a scheduled time to chat further	✗ Trap them in a long, unexpected conversation without verifying they have time

Platforms for Prospecting

IDEAL CUSTOMER TYPES / GOALS

01 _____

02 _____

03 _____

Pull up the platform you're focusing on and perform research. Write down potential prospects for the platform. List their handle/name.

FACEBOOK

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

LINKEDIN

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

INSTAGRAM

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

FB GROUP 1

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

TIKTOK

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

CLUBHOUSE

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

FB GROUP 2

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

OTHER

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

OTHER

01 _____

02 _____

03 _____

04 _____

05 _____

06 _____

Weekly Prospect Sheet

Start Date: _____

Follow Up Date #1: _____

Follow Up Date #2: _____

Name: _____

1

Initial Platform: _____ Potential Product: _____

Resource: _____

Notes: _____

CHECKLIST	
<input type="checkbox"/>	Initiate conversation
<input type="checkbox"/>	Collect email address
<input type="checkbox"/>	Send resource(s)
<input type="checkbox"/>	Follow Up
<input type="checkbox"/>	Pitch Product / Service
<input type="checkbox"/>	Follow Up Again
<input type="checkbox"/>	Ask for connection

Name: _____

2

Initial Platform: _____ Potential Product: _____

Resource: _____

Notes: _____

CHECKLIST	
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<input type="checkbox"/>	Send resource(s)
<input type="checkbox"/>	Follow Up
<input type="checkbox"/>	Pitch Product / Service
<input type="checkbox"/>	Follow Up Again
<input type="checkbox"/>	Ask for connection

Name: _____

3

Initial Platform: _____ Potential Product: _____

Resource: _____

Notes: _____

CHECKLIST	
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<input type="checkbox"/>	Pitch Product / Service
<input type="checkbox"/>	Follow Up Again
<input type="checkbox"/>	Ask for connection

Name: _____

4

Initial Platform: _____ Potential Product: _____

Resource: _____

Notes: _____

CHECKLIST	
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<input type="checkbox"/>	Follow Up Again
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Name: _____

5

Initial Platform: _____ Potential Product: _____

Resource: _____

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6

Initial Platform: _____ Potential Product: _____

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