Restoration Commercial Sales Overview

1. Prospecting
   a. Tools
      i. Apollo.io
      ii. Reonomy
      iii. CoStar
2. Outreach (Awareness/Drip Feed Stage) - Unique offering
   a. Email
      i. Personal
      ii. Newsletter
         1. MailChimp
         2. Sendinblue
   b. Mailer
      i. Coffee Meeting (Coffee GC)
      ii. Personal Reference
         1. Alma Marta
   c. Text/Notifications
      i. EZ Texting
      ii. Slick Text
3. Setting Up The Meeting
   a. Touches
      i. Phone Call
      ii. In-Person
      iii. Email
   b. Value add
      i. ERPs
      ii. 3D scans
      iii. Site analysis
      iv. On-site equipment
   c. Stick to the point
      i. Focus on the meeting not too much info without presentation
   d. Overcome objections
      i. Having a plan in place is likely their responsibility, why wouldn't they have one?
4. Meeting
   a. Technology
      i. PPT Presentation
      ii. Zoom

      b. Discovery phase
           i. Open-ended questions
          ii. What's important to them
      c. Be prepared or not prepared
           i. Do they already have parts of a plan in place
          ii. Focus on solutions to minimize downtime
               1. Matterport Scans
               2. Site Building Analysis Assessments
               3. Site Walkthroughs, ERPs
               4. On-site equipment
         iii. Focus on BC planning as a whole, not just disaster recovery
               1. Required by insurance companies
               2. Covers several departments; facilities, risk management, HR, security, IT, more.

5. Closing
    a. What would prevent them from signing up today?
    b. When will they have a decision?
    c. Do they have all the information they need to make a decision?
    d. You want them to have skin in the game - this is a two way street

6. Establishing relationship
    a. Implement agreement
    b. Execute loss leaders
    c. Follow up

Restoration Commercial Sales Playbook

Step 1: Prospect

1. Gather 500 verified names
    ○ Name, Email, Phone, Address
2. Add to CRM
3. Identify top 100 names
    ○ Use this as first cadence run through

Step 2: Awareness Outreach/Introduction

1. Send soft introductory newsletter
    a. Ex. Disaster planning, see **N1**
    b. Wait 2-3 days
2. LinkedIn connect
    a. See **L1**

Step 3: Intro + Curated Outreach

1. Mailer
    a. Execute mailer approach to those in cadence
    b. Send **M1**
        i. Send priority mail
        ii. Set up email alert on delivery
2. Introductory phone call - first 100 names in cadence
    a. See **P1/V1**
3. Soft follow up personal email referencing mailer
    a. See **E1**
    b. Send upon delivery alert
    c. Wait 2-3 days
4. Mailer follow up
    a. See **P1/V1**
    b. LinkedIn message
    c. Wait 2-3 days
5. Purpose reach out
    a. See **E2**

Step 4: Final touches
1. Is this a priority
   a. See **E3**
   b. **P1/V2**
2. FInal touch
   a. See **P1/V3, E4**
      i. Archive lead
      ii. Throw back into cadence if it's worth it in 2-6 months

Step 5: People respond with interest
   b. Stick to the point
   c. Schedule a meeting

Step 6: Meetings

1. Meeting
   a. Focus on value adds - what interests them/makes sense for them
      i. Disaster Planning
      ii. Site Analysis
      iii. Matterport 3D scans
      iv. DEHU on site
      v. All of it
   b. See **MQ1, O1, P1**

Step 7: Establish Relationship, New cadence

1. Close your meetings with relationship builders/loss leaders
   a. ERPs
   b. Matterport
   c. Site Analysis
   d. Execute
2. Start new new cadence with remaining prospects from step 1
3. Complete any stragglers in the cadence
   a. Always keep the CRM up to date

Step 8: Drip Funnel

1. Add established relationships, agreements, etc. into special list for drip info
   a. Specific email list
   b. Text notification list

Analysis:
What was your initial response, meeting rate, and started relationship rate?
How much sq. ft. do you have have under agreement?

Join the FB Group to share info and ask questions:
https://www.facebook.com/groups/444125193428588

Scripts & Walkthrough Attachments

N1 - Example disaster recovery email

M1 - Mailer intro

L1 - Linkedin connect

F1 - Flyer example

P1 - Intro, appt set up call

V1 - First/intro voicemail
V2 - Priority
V3 - Final

E1 - Email after mailer
E2 - Reason for reaching out
E3 - Priority
E4 - Final

O1 - Objections

MQ1 - Meeting probing questions

P1- Presentation starter