RESTORATION ERP
PREPARE IN ADVANCE. MINIMIZE DISRUPTION.

Commercial Sales Quick Action Item List

1. Choose items in your ERP program
2. Create prospect list > upload to CRM
3. Begin outreach/introductions > schedule meetings
4. Meetings/Presentations
5. Close/onboard clients

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
        v. Loss scenario run-throughs
    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

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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 the 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. Introductory phone call - first 100 names in cadence
    a. See **P1/V1**
2. Soft follow up personal email
    a. See **E1**
    b. Send after getting contact info/intro call
    c. Wait 2-3 days
3. Purpose reach out
    a. See **E2**

Step 4: Final touches

1. Is this a priority
    a. See **E3**
    b. **P1/V2**
2. Big Client - if the client is important, try sending an oversized mailer to get their attention
    b. Mailer

i. Packages are always open. Often times prospects feel inclined to take your next call/meeting
ii. Send **M1**
    1. Send priority mail
    2. Set up an email alert on delivery
iii. Follow up with **E5, V2**

3. Final touch
    c. See **P1/V3, E4**
        iv. Archive lead
        v. Throw back into cadence if it's worth it in 3-6 months

Step 5: People respond with interest
c. Stick to the point
d. 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. Equipment staging
    e. Loss scenario run through
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 a 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 under the 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

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