

James Buckley:

Welcome to another JB Sales Joint. We're going to deliver you some tactical ways to book more qualified meetings in less than an hour. I am joined by Leslie Douglas and the one and only, Ralph Barsi. Two people that have extensive experience booking meetings efficiently, and they're going to share their insights with you. Good afternoon to you both.

Ralph Barsi:

Hey, what's happening? It's good to be here.

Leslie Douglas:

Hey, Hey.

Ralph Barsi:

By the way James, the extensive experience means we have fallen on our faces trying to book meetings too. So let's be very clear.

Leslie Douglas:

Exactly.

James Buckley:

Yeah. That's true.

Leslie Douglas:

Exactly what it means.

James Buckley:

That's true. And for those of you out there that feel like you fail every day at booking meetings, don't worry. That's how lessons happen. As you guys know, we like to kick off with knowing who's in the room. This way we can tailor the conversation to the folks that are here.

James Buckley:

So if you're an SDR, if you're an AE, a manager, leadership or other, maybe you're an alien, let us know. So like I said, Leslie and Ralph are going to share their insights with you on how to schedule more meetings in under an hour. I want to give a shout out to the tribe for the vibe that helps you thrive. Proposify, SalesLoft, Vidyard, Chili Piper, Gong, Reprise and our latest edition to the family, Dooly. We are extremely fortunate to be able to work with all of these companies, their products, their services, help salespeople sell better.

James Buckley:

But aside from that, these teams are incredibly gifted at showing their prospects a wonderful experience from start to finish. Write them down, take a picture, grab your screenshot, whatever you need to do in order to make sure that you check these products out and their services, because they can change the game for you and your team.

James Buckley:

So make sure that you check that out. Everybody got it? Everybody got their screenshot? Solid. All right, one more thing before we kick this thing off. We are doing an incredible webinar next week on game changing one-on-ones. So if you attend one-on-ones with your leaders, you need to be a part of this webinar. If you are a leader that does one-on-ones, you need to be a part of this webinar.

James Buckley:

These things are important because they help people grow, get to the next stage in their careers and those one-on-ones can be extremely impactful. We're going to be joined by Ella Stone and Catherine and drew high. I hope I did not butcher your last name to my, so join me and Shelly, as we talk to these two people. The link is broken. Let me see if I can make sure that I get that in there. Copy link.

Ralph Barsi:

You've got to love the realtime feedback.

James Buckley:

Realtime feedback. That's what's up. Hey, but we love it.

Leslie Douglas:

We'll get you.

James Buckley:

Try that one right there. Let's see. Yeah, that one should work. So let me know if that one doesn't work. Yeah. Good to go. Tommy. Hey, welcome back. You were here with us yesterday, buddy.

Ralph Barsi:

Hugo, good to see your name Hugo.

James Buckley:

Let's go over some quick rules. I always like to set the ground rules so that everybody knows where we stand. The standard rules apply. You're going to get the recording. Please stop asking us for the recording. I need T-shirts that's say, "You're going to get the recording." Let's keep it professional. Keep it positive and constructive. Don't make me boot you out of here. No littering. We don't at your LinkedIn profiles littering the chat. No littering here.

James Buckley:

Engage with us. We want to see your questions, your comments. So put them in the chat, answer the questions. Put them in the Q&A if you have them and the questions belong in the Q&A I'm not sure why this is difficult for people. You need to put your questions in the Q&A. When you put them in the chat, they immediately get buried. Let's look at some of these results right here. Bam! Mostly SDRs in the room. Shout out to the AEs.

Ralph Barsi:

In-house. What's up?

Leslie Douglas:

Nice.

James Buckley:

Shout out to the AEs that actually prospect, I love you. We need more humans like you that do the job. Congratulations, you are in the right room. Managers, 11% of the people in the room are in the managers. Yo, we need more managers to give a shit. All right, listen to this. Don't get pissed when you missed the quota. We told you, when many arrived, don't spend too much time. The two in the room were born to coach. So they're going to give you a new approach. Leslie, what are we going to talk about today?

Leslie Douglas:

We are going to talk about some ways that we're going to get meetings and like James said, we want to do this fast. We're all looking to book meetings the fastest way possible. And there are some things that tend to be what people... I think the traditional term is low hanging fruit, if you will? That we're all looking for.

Leslie Douglas:

What are some avenues for me to jump in and do that? The four areas we're going to focus today are referrals, dormant leads or old opportunities, upsell, cross sell and LinkedIn lists. But Ralph and I were chatting about this ahead of time and when James and Ralph and I get in a room, just fireworks. There's things happening. We have all these ideas. So we decided we wanted to start off by talking about some tactical tips before we dive into these. Can we check that out? Let's put up a screenshot.

Ralph Barsi:

Boom!

James Buckley:

Boom!

Leslie Douglas:

Boom.

James Buckley:

Boom!

Leslie Douglas:

Ralph, do you want to... Kind of walk us through here what we're starting off with.

Ralph Barsi:

Yeah, I'd be happy too. Let's go back. You don't have to go back a slide, but let's go back a few minutes when James was talking about, "Hey, don't litter the chat window with your LinkedIn profile." Don't do that, number one. But number two, it's a reminder to all of us, not everybody's down with this, but you should be down with it. How about that? I think if you're going to reach out to somebody on LinkedIn to

request to connect with them, you've got to include a note. You've got to add context and color as to why you're reaching out.

Ralph Barsi:

At the very least, just say, "Thanks for connecting here." And that's it. And the probability of them accepting your request is much higher. Otherwise, what happens is they just stack up in somebody's inbox. I call it my ice box because frankly, I don't know who these people are.

Ralph Barsi:

And I don't mean any disrespect or anything, but I don't know what the context is as to why they were even reaching out to me in the first place. I might be able to be of service or of help or vice versa. I might be able to use their services and their help, but if I don't know who they are, I'm sorry to break it to you, I'm not going to spend my time kind of scrolling through LinkedIn profiles to see kind of what the background is, see who we know, et cetera, et cetera, and go, "That's probably why they're reaching out." Add a note and help the recipient out when you're reaching out to them.

Ralph Barsi:

I had to mention, James, just because you talked about not littering the chat window with LinkedIn profiles, I think it's really important to have that color and context. But do you want to go ahead and put that slide back up and I can run through the bullets? Would that be helpful?

James Buckley:

Let's do it.

Ralph Barsi:

All right. Cool. We titled this talk, A Tactical Approach. Those are the first three words. So we want to come right out of the gate with tactics. So some of this is fundamental and 101, but you'd be surprised how many people either forget this stuff or just don't apply the fundamentals.

Ralph Barsi:

First of all, who is it that we're targeting? Let's make sure that we're aiming for the right persona in the accounts for example, that we're trying to engage. A lot of times you can read case studies or you can go to YouTube and that's the company's YouTube page and learn a lot about how that company talks about its offering to general marketplace. People who are not experts in SaaS, et cetera, are able to learn what's up and how the company portrays itself and conveys itself.

Ralph Barsi:

Same with people. A lot of the executives that we're trying to reach out to have sat on webinar panels like this one, they've been on stage at conferences, some of them have their blogs, et cetera. But a great way to find out more is by reading case studies and getting onto YouTube to learn about that right person.

Ralph Barsi:

That way, segueing into bullet point number two, you can really tailor an agenda when you're sending them a calendar invite after maybe an email that you just sent as an intro or an initial conversation that

you just had. A lot of people have good conversations and we're all guilty of this. We get happy ears when people are down to talk with us and want to meet with us next Tuesday. And so we fire off a calendar invite or we invite them to select a time on our calendar, but there's again, no color or context to follow up what we just talked about.

Ralph Barsi:

So it's critical that you use the PAO Approach or something like it, which is equal to a purpose, an agenda, and an outcome. And I'm not asking or suggesting that everybody write a dissertation. I'm just telling you to maybe one or two punch points under each of these headings is going to get that conversation going in the right direction and it's also going to warm up the conversation for people. A third-

James Buckley:

I want to-

Ralph Barsi:

What's up James.

James Buckley:

No, I just want to jump in real quick and I want you to unpack this because I know there's probably a lot of people in the room right now that are thinking, "Sure. I could throw a purpose and an agenda and an outcome here, but don't I have to earn the right to do that?" How do you go from cold to having a purpose, agenda and outcome?

Ralph Barsi:

Awesome. So we will get to that, but right out of the gate, since you asked, I'm not a fan of cold calls, have never been a fan of cold calls in my decades of selling. It's not fun. It's awkward. I know I'm interrupting and disrupting people. So I'm going to do everything I can prior to engaging, to just warm up the calls best I can. Some of the studies and research that I just suggested you do will help warm the call up.

Ralph Barsi:

I'm always asking myself first, who do I know that knows somebody in this account or knows the very person that I'm trying to reach? And then I'll reach out to them to see if they could broker an introduction and somehow warm up that conversation. In the initial conversation, obviously you don't have much time to do this, but you've got to build credibility and rapport by talking to them about them, not about you.

Ralph Barsi:

A lot of people, I see this happen a lot with new hires, they're so excited, they just learn so much about their new company, the offering, the iterations of that offering, the new leadership team that's on board, et cetera. And they just can't wait to tell prospects about them and that is not the way to roll. You've got to flip the script and talk about the people that you're calling and talk about their problems, their customers, the things you've learned about them and that's how you can build fast credibility and rapport and warm up that whole conversation.

James Buckley:

That's good. Leslie, anything you want to add to that?

Leslie Douglas:

Yeah, I would say and I've seen it pop up in the chat a little bit here too, everyone is different. All of our recipients are different. They're different people. They have different titles. They're at different companies, different generations, different... Everyone comes from a different walk of life.

Leslie Douglas:

I think that there's plenty of tools on LinkedIn specifically that we're talking about this, that help you tailor that. You can recall an invite that you sent out. If you personalized it. I see a lot of people talking about what lands with them. You can recall it, take that invite back and then like resend it blank. Maybe that will work. Maybe try something different. Just having that opportunity to look at everyone has their own language that they want to speak and everyone receives information in different ways.

Leslie Douglas:

Having a repository of ways that we can connect and ways that work. I saw a few like really great one-liners to put in there. Ralph mentioned like looking to connect with people in this industry. Oh no, that was in the chat. But we all have these one-liners that work. Put a bunch of those on a list and try them. A/B split test them. See what works for you.

James Buckley:

Yeah. That's actually a good answer for Gigi, that question that's number one voted. Let's answer some contextual questions here real quick. Since we're on these topics, we're going to get back to the other tactics, but let's unpack these for everybody that's asking relevant questions to the topic. How do you establish this relevance on LinkedIn messaging? When the prospect's profiles are extremely dry. If you can't find something to use as a trigger that's relevant, how would you go about finding something relevant?

Ralph Barsi:

Let's think about it. Let's just say, you're looking out your front window and you want to knock on the door three doors down and you don't know anybody, but you know neighbors in the neighborhood that might know somebody that lives in that house. The same applies in the professional workplace. Try to talk with people who, if they don't know the direct person, you're trying to reach out to try the same personas because the same personas for the most part, especially if they're in the same industry are trying to overcome the same challenges and problems and probably have similar priorities.

Ralph Barsi:

So if there's a way you can spot the pattern and the rhythm that different personas are establishing, you can again, approach somebody, just giving it a shot, seeing like, "Look based on what I've learned about your persona, your company, your industry, and the people who are doing similar things to what you're doing in the workplace, I would gather A, B or C would love to talk with you about D, E or F."

Ralph Barsi:

And it's okay to let people know that you're not quite sure how to approach them. To Leslie's point, everybody's like a tuning fork. They're all tuned to a different pitch or a different key than yours. So you've got to be super mindful of how people are rolling to see if you can mirror and match their personalities virtually and in person.

Leslie Douglas:

I really like... The tuning fork is so beautiful. I think that's such a great way to put it. I would much rather receive a message that's relevant to me in my title and my role, what's going on in my company, my organization, something that speaks to that. So instead of going towards... Like if you look on my profile, I would rather you send me a message about news happenings, what's going on in my organization than going down the, "Leslie. I see you like glitter."

Ralph Barsi:

Yeah. Totally.

Leslie Douglas:

Cool. How does that bring back... Like how does it tie to the value of what you're going to bring to me? Unless you're selling glittery software, then call me, we can talk. But switching back and forth between finding something relevant that's going on in their organization versus something that's like, "I see that you have a picture of a boat on your wall." That used to be a great starting talking point for door-to-door sales too. "Let me see what's going on in the back."

Ralph Barsi:

Exactly. Yeah. It is a lot of 101 fundamental stuff. But again, as I mentioned at the beginning of the call, it's overlooked more often than we'd like. So let's make sure that we keep a list of what the fundamentals are and ensure that we're applying them. Because most of the times, most of the time you apply the fundamentals, you're going to move the needle. Being want to mindful-

James Buckley:

I want to move through... I know we've got... Go ahead, Ralph.

Ralph Barsi:

Yeah. Being mindful of time zone is super important. Like you literally put yourself in their world. Always be specific. Even if it's one line, be specific about what time you'd like to meet with them. You could see the bottom bullet point says Thursday, March 24th at 9:30 or 11:45 AM at Central Standard Time. I just mentioned I'm in Danville, California. That's Pacific time zone. But I'm thinking in terms of where the prospect is or the partner is or the customer is, et cetera, and you should too.

James Buckley:

Yeah, not bad. I like the, "Literally put yourself in their time zone." These tactics cover a lot of things that are common challenges for your modern sellers. I'm curious for everybody that does this on a day to day basis. In the grand scheme, what is your number one challenge right now when it comes to booking the meeting?

Ralph Barsi:

Good question.

James Buckley:

Yeah, this is good. While we're talking about this, let's get to another question here. That's relevant to these tips. So we talked about the LinkedIn note and then Leslie brought up the point of you can withdraw that note. There is a time gap that's there. You do have to wait. I think Michael Allon put this in. Shout out, Michael. You do have to wait two weeks on LinkedIn before you can send another one after you recall an invite. That's actually a really good point.

Leslie Douglas:

Only if you're doing it thousands of times. You can hit refresh and send if you're doing it minimally. Don't go crazy. Don't go to LinkedIn jail. Don't recall all of them. But if you just recall it and refresh, it lets you send it right away. But you've got to be sneaky a little bit. Oh yeah. Three weeks. Hey Morgan.

James Buckley:

Hey Morgan. Morgan's in the room. Shout out Morgan man. What's up dude?

Ralph Barsi:

Three weeks. Good. Wow. Didn't know it was three. I thought it was two. What up Morgan? One of my favorite people on the planet.

James Buckley:

So let's talk about that-

Ralph Barsi:

Sorry James. Sorry, James. Real quick. Leslie was talking about unless you're sending a lot of them at once and I'm sure a lot of people are on this call asking, "Hey, look. I really appreciate the whole add a note before requesting an invite, et cetera, et cetera. How do you do all this stuff you're talking about at scale?"

Ralph Barsi:

And what's really important is that you start to compartmentalize or put in buckets the different you industries that you're calling into, the different personas as well as the different time zones so that you can say a lot of the same stuff and maybe leverage like the 10-80-10 rule. 10% is personal, 80% is general and then the last 10% is personal. That's super effective.

James Buckley:

That's good. Write that down. 10-80-10 rule. Say it one more time for us.

Ralph Barsi:

Yeah. 10% is personal, 80% is general, something that you would say to most people in that title or in that role or in that industry or in that neck of the woods. And then the final 10% again is about them.

Leslie Douglas:

I like it.

James Buckley:

Nice. That's good. That's a good formula to follow. Look at these results right here from this poll. Finding a time, generating interest, transitioning from the value prop to scheduling. I think generating the interest, it takes the cake by a long shot. 75% of them have a difficult time generating the interest. So let's talk about some built in interest that we can earn with good referrals. We've got a lot of tips here on referrals.

Ralph Barsi:

Yeah. And also when it comes down to generating interest, you and/or your offering and/or how you solve problems that this company might be running into, have to be interesting. Success is something you attract by becoming an attractive person. Doesn't mean you need to be gorgeous.

Ralph Barsi:

But what you do need to do is be mindful of how you're showing yourself to the marketplace. So as we all know, if somebody's going to look you up on LinkedIn, do you have a professional headshot? Are you smiling? Do you have any color or context in your header or in the descriptions of the different roles that you've held or the schools you've gone to or the side projects you've done or the charities that you've supported?

Ralph Barsi:

Is there any color or context for a reader to get interested from and about? So check yourself first. If you're not generating interest, it's probably because you're not being interesting.

James Buckley:

Yeah. There's a couple of comments there that say, "You've got to be interesting if you want to generate interest." That is true. I will support that.

Ralph Barsi:

Moving on to referrals. Again, it's listed first for a reason. One of the first things salespeople and leaders, when they're trying to meet people and network, one thing they should always ask themselves is, "Who do we know here that knows someone at this company or knows this very person?" And that really goes back to what we just talked about. You've got to cultivate the network that you already have.

Ralph Barsi:

A lot of people are so fired up to go add people to their LinkedIn network when the people who were in their LinkedIn network never hear from them to begin with. So why don't you take stock of who's already in your network and ask yourself, "How good am I at regularly reaching out to these people? Do I come from a source of service and help? Or am I just kind of trying to get everything I can from these people?"

Ralph Barsi:

So the more you're cultivating and nurturing your existing network, the easier it's going to be to ask people for a referral or to broker an introduction. Also, if you are giving them world class experiences and delighting them with your offering and your customer success program, et cetera, you're going to be able to earn the right to ask them who else should be talking to us? Who are we not thinking about that might benefit from our offering and our service. And that's how the whole referral game works. Frankly, it's how the world goes around.

Leslie Douglas:

I think a lot of times too, when you're first starting out, I saw that we had a good amount of SDR BDRs on the line, your leadership team, specifically people, if you're calling into chief revenue officers, you have a chief revenue officer internally who has connections in their same role a lot of times and seeing who they're linked to. Like who's your common? Do you have someone that you know that's in common with them? How can we leverage that relationship? It's worth an email or a Slack message or Teams or wherever you're at and saying, "Hey Mr. Chief Revenue Officer. How well do you know James? Do you think you could make an introduction? Do you think that you could send a message on my behalf to start this conversation?"

Leslie Douglas:

A lot of people aren't taking advantage of the leadership team that they have internally in terms of referrals too. See where people... Oh yeah. Hey slack message. Hey...

Ralph Barsi:

Most leaders are super impressed when they're getting bugged a lot from people who are asking them to broker introductions, as long as that bugging is tactful and happens the right way. So if you do meet Mr or Mrs. CRO and you ask if it'd be okay if you look into mutual connections that they have, is it okay to maybe send you a weekly digest asking if they'd be open to make these six introductions and that kind of segues into the importance of tee it up for them, start crafting the message for them to then tailor and forward to the person that you're trying to get connected to. Don't let them do the work per se. You do the work ahead of time for them that they can just fix shape and send off versus saying, "Hey, Leslie. Do you mind reaching out to so and so. Thanks, that'd be awesome." And then having her do all the work, that's ridiculous. Let's act like professionals here.

Leslie Douglas:

It's a huge lift. It's much easier for them to pass along and edit something that's already put together. Completely agree.

James Buckley:

Do you guys feel like there is... I know that one of the hardest things that salespeople can get from prospects is trust, credibility. Do you feel like there's instant credibility built in when there's an intro or do you feel like the rep still has to take steps to earn that right after the fact that they've been introduced? Because I find that sometimes there's a connection made and there's a warm intro and the rep immediately jumps on, shares the screen, starts pitching and that wasn't like the intended purpose of that introduction. I feel like sometimes the folks we ask for introduction feels slighted. What do you guys know about that kind of situation?

Ralph Barsi:

What a great point, James? I would say it's the latter. You absolutely have to still earn that credibility and rapport, but I'll tell you what? Now, there's even more pressure because that person, to your point, has vouched for you and has put their name, reputation and background on the line to broker the introduction.

Ralph Barsi:

So now you have to rise to the occasion and to the scenario you suggested where people kick off with the pitch deck and just launch right into it, completely negating and forgetting how we even arrived at this point is not cool. Call out the elephant in the room. "Hey Leslie, what a pleasure to meet you? James was gracious enough to connect us. I can't thank you enough for being flexible and having this meeting at all. Obviously, I want to make James look great and ultimately we want to make you look great with our offering. So I'm going to do the very best I can to be mindful of your time today and I'm going to cut right to the chase and talk to you about what it is we're trying to accomplish."

James Buckley:

I like it.

Leslie Douglas:

I think the introduction doesn't mean that they're in a buying cycle either. So they may not need what you have to offer, but they're accepting this meeting because of the connection. You still need to qualify them. I feel like you can't just run into the pitch. You still have to have that conversation and figure out if there is a fit. And if they are in the space.

Ralph Barsi:

100%. You've got some context now. "Hey, Leslie. I know we were connected via James. I've heard this from James about you and how the two of each other. What's your take on things?" Just build a little bit of rapport that way and then say, look here's what we're going to be talking about today. You can tell me if my timing is cold, warm or hot, but we're hearing these problems in the marketplace as they relate to your persona, et cetera, et cetera and you're off and running.

Leslie Douglas:

Beautiful.

James Buckley:

So we want to give you some actual examples, but before we do that, right before the halfway point here, we do like to give you guys tangible things. There's been a couple of tools thrown into the chat. So scroll through the chat, make sure you find those tools that people have thrown in there to help you sell better. At the same time, we want to give you something from our friends at Proposify. The 2022 State of Proposals is now available. This is going to help you to close more deals by writing better proposals, using different techniques and strategies inside those proposals that prompt people to sign on the dotted line.

James Buckley:

Make no mistake, you cannot get paid until they sign on the dotted line. So use this to get all the insights that you need. Sending more proposals through 2022. Now, I'd like to answer a couple of questions

because we have over 20 questions already asked, and it's all related to the stuff that we've already thrown out there.

James Buckley:

And then we're going to show you some real examples of introductions and things that you can do to get those referrals in the door. Number one way to get those nice quick booked meetings, referrals. Good stuff to know. So we'll give you that information. I believe I'm saying your name, Kirsty. Kirsty, "As a director of sales with full LinkedIn connection requests, I am way less likely to connect with someone who reaches out with a direct agenda. Do you find that it's better to reach out with something like," and then in quotes, "'Looking to connect with other experts in X.' Versus, 'Looking to connect to see how we can help you with Y.'" I think the psychology and making it about them, not about us works best. What are your thoughts on that?"

Ralph Barsi:

She's spot on. Yeah, that's not the venue per se to go ahead and be direct like that. We haven't even met yet and you already want to dance. You've got to turn up that volume knob slowly and gradually, but you do also want to, as we talked about earlier, peak their interest.

Ralph Barsi:

When you are adding a connection on LinkedIn, let them know that you'd love to follow up with a little more detail and color as to why you're reaching out to connect in the first place. Again, that gives them an opportunity to say, "I'm not interested." Or, "Don't pitch me right out of the gate," et cetera. But now they have an option versus just getting blindsided by you. So I agree with her 100%.

James Buckley:

That's good, Leslie.

Leslie Douglas:

I, again, think that this is something, it depends on who you're calling into. Like technical personas, changing your subheading or your title at the top of your profile to remove sales. I don't want to remove sales from anything in my life and I'm not co-signing that, but we're seeing more connection requests get accepted that way. Trying to...

Leslie Douglas:

Just trying different little things, blank connections for manager level. Maybe a little note, like has been mentioned here for VP and above. Just trying different things for different personas, different title types that you're calling into.

Ralph Barsi:

Yeah. You bring up a good point about the whole subheader of sales. We're in sales. So think about reaching out, excuse me, to the dare I say sales people in the company you're trying to reach and talk with them about what's going on in the field for them, what problems they're trying to overcome and how you might be of service to them.

Ralph Barsi:

Is there anybody you'd like to connect them to or they'd like you to connect them to and start building credibility and rapport with that function. They are our people and ultimately you will get to the people you're trying to get to. But oftentimes we operate in haste with a tremendous sense of urgency and we overlook the human element of what we're doing.

James Buckley:

That's good stuff. What do you guys think about unconventional methods like sending a GIF or a GIF, however you pronounce it, don't skewer me if you pronounce it one way over the other. How do you feel about sending those when somebody doesn't answer something or sending a video message when somebody doesn't respond to your written message, do you think that's too much? I do not personally.

Ralph Barsi:

Personally, I don't. Again, it goes back to the tuning fork concept. Some people aren't down with that. They're not going to find it amusing at all. You've got to tread cautiously when you do that. Personally, I'm a bigger fan of sending a video message, but that's because I'm comfortable on the video and on a microphone. I have no problem sharing with people by way of video, my mannerisms, my inflections, my tone, my disposition.

Ralph Barsi:

Because even though I've got a croaky voice right now, you're not going to hear that or understand it in an email. It's really tough to discern that kind of stuff. When you're reading through an email and that's where the power of video comes in and you might be able to disarm people and say, "Hey, my follow up email might have a GIF or GIF file in it. But I want you to know where it's coming from and who I am."

Leslie Douglas:

The tone shows your intention. That's why we make the phone calls. That's why we do the video or the voice message. Your intention shows through, they know you're a human and that you're a great person. I couldn't agree more. I do think it depends on who it is.

Leslie Douglas:

I look at their online presence first. I know someone dropped crystal nose earlier. I look at how formal is their photo. I look at how formal their writing style is. Even if they don't post anything and we're just looking at their job history, I look at their... If it's someone who I really need to get hold of, I'm talking like top tier prospects, I'm looking at the notes that they're... Why am I blanking on the name? When someone can write a little blurb about working with you in the past. What's-

Ralph Barsi:

The recommendations?

Leslie Douglas:

Recommendations, right on the LinkedIn. I'm reading through those. Does it say that they're like the class clown and super humorous and it's great working next to them, I'm popping a GIF, GIF, it's a GIF, no, it's a GIF, into their message, but if not, if they seem more polished and professional, I usually try to match that tone.

James Buckley:

Yeah.

Ralph Barsi:

Hey James-

James Buckley:

Matching tones is important.

Ralph Barsi:

Thank you for that, Leslie. James, can we talk about Europe real quick? I saw a lot of flurry in the chat window, especially from my man, Hugo. He's over at a CrowdStrike. He and I worked together at ServiceNow, but I know there was some chatter about what's going on in Europe and how to take a different approach to a European audience. Can you read what he said?

James Buckley:

Yeah, go for it.

Ralph Barsi:

No, I'm asking if you could read what was being talked about.

James Buckley:

Yeah. What he was saying was that sending a GIF or a video when someone doesn't respond in France is a huge no-no.

Ralph Barsi:

Oh, for sure.

James Buckley:

Yeah. And that makes a lot of sense and that's why I said in the chat regional selling is a thing. If a specific cultural norm, it's best not to that cultural norm, because you might overstep, you might irritate somebody. I think I was merely supporting what he was saying about the regional selling part of it. You can do things in some parts of the world that you just can't do in others. It helps Leslie, I think you have a book about this, do you not?

Leslie Douglas:

I do. I didn't write it, I just read it. This is my favorite part. We train with global organizations all the time. I'm going to use Germany as an example. If we're calling into traditional German organizations like car companies, banks, financial, FinTech, no, to video, but Germany on the more tech companies, like blowing up in videos. So I will say even, it depends on when the company was founded, what their values are and their region and how we're not going to skip levels, how we're opening things. So taking it as a framework and then applying your region and applying what matters, where you are, just using the framework and the ideas is where we're rooted in and then trying to figure out how can I nuance that to make sense where I am and where I'm selling into.

James Buckley:

All right. Let's go. I want to give you guys the example and I want this to be broken down of why this is a good example when you're going in, asking for that introduction.

Ralph Barsi:

Sure. Yeah. This comes from an article I wrote a few years ago about how the best SDRs take massive action. When taking massive action, they build that momentum that all of us are looking for in our everyday work. Going back to referrals and asking people to broker introductions, this is just a sample request that you can consider using as a template or just getting some ideas from before you ask somebody, if they'd be open to brokering and introduction for you. So very basic sub subject line. Could you introduce me?

Ralph Barsi:

"Hi, James. I'm writing to ask for a favor. I saw you're connected to Leslie." And I have maybe Leslie's name hyperlinked to her LinkedIn profile or maybe your company name, et cetera. "Would you consider introducing us?" So I'm going to stop there because it's important that you put the ask right up front.

Ralph Barsi:

A lot of us wait till the very end of an email and we expect that recipient to read, read, read, read all the way down to the bottom of the slope and then we put our ask there. Instead, move that ask all the way to the top because people are busy. People want to know what it is you want from them and want to know as soon as possible and then when they read on, that's when you provide that color and context that I've continued to talk about, that can drive why you're even asking for the introduction in the first place.

Ralph Barsi:

I'll finish with this at the very end. You say something personal. "Thank you, my friend. It was great seeing your name today in my search. If I'm trying to get in touch with Leslie and I see she knows James Buckley, it's like, "It's my buddy, James. So good to see your name come up in the search. I hope you and your family are doing well," depending on the degree of how well I know James, "and hopefully we can connect soon separate of this, but I'd love the consideration."

James Buckley:

It's good. It's not a bad template. I hope everybody got a screenshot of that. You can use some amalgamation of this and make it your own and probably see some success. Let's talk about what people should be avoiding or at least on the lookout for.

Ralph Barsi:

Yeah. You want to give people options. I often talk about if you're running into a problem right now in the workplace and you want to just escalate it to your leader for some guidance and some insight, again do the work for them. Try to uncover two solutions to that problem before you escalate it to someone.

Ralph Barsi:

Nine times out of 10, you're going to figure that problem out on your own. And you're going to illustrate leadership by example, because you actually critically thought about the problem and how to dismantle

it and then put it back together as a solution. Well, the same applies when you asking somebody to broker an introduction for you, you frame up a message like that and send it to them. Now they've got some options, they've got some context, they've got choices.

Ralph Barsi:

Some of the potential outcomes could be, they don't respond to your request at all. Have a plan for how you're going to handle that. Email them two to four days later. Assertive, but not urgent. Somebody might be traveling. Somebody might be taking care of family that week. You don't know what's going on in someone's life, so don't make those assumptions, just email them two to four days later with a gentle nudge. And it goes on and on to a couple of different options that you can learn how to handle in those situations.

Leslie Douglas:

One quick finishing note on this, always follow up with the person who made the introduction. I think this goes... I put a calendar invite for myself to just touch base and let them know. Not to touch base and check it, no. But let them know where it is. What's going on? What's happening with the introduction that made so that they feel like there's a closed loop there and they will offer to do it for you again in the future.

Ralph Barsi:

I couldn't agree with you more and I have a problem with this when it comes to referring candidates to hiring managers. We see it all day, every day on LinkedIn. "Hey, if you know anybody that's looking for an SDR role, we are hiring, send us your referrals. We send people the names of these candidates that are viable candidates and we never hear back from the hiring managers to what happened to them, how the process went, what they thought, any feedback. Nothing, it's crickets and it drives me bananas so I'm really glad you brought that up.

James Buckley:

Yeah. There's some good question here. What do you do when the referral ignores it?

Ralph Barsi:

When the referral ignores it.

Leslie Douglas:

The person you're connected to, or the person they are connecting you to?

James Buckley:

Yeah. So the person that your connection referred you to, what do you do when that referral ignores you?

Leslie Douglas:

That's going to happen.

Ralph Barsi:

Yeah. Yeah. What would you, Leslie?

Leslie Douglas:

I think you put them into a sequence the same way you would with anything. It's do you continue that? "Brian, it happened last week." How many of you are buying a car right now? Give me a one in the chat if you're buying a car right now. It's going to be a very small number of people who are in that buying cycle. So there's a reason they're not responding. Either the connection is not as strong or they're not interested and they don't want to make someone feel bad or they didn't see the email they're traveling end of quarter. There's going to be reasons.

Leslie Douglas:

Try again, try a different avenue. Go back on the referral a couple of times, take a step away, go find someone else in the organization. Prospect into them. Try different-

Ralph Barsi:

Be cool about it through the whole process. Like we talked about earlier, circle back with the person who made the referral, just make sure that they're in the loop and aware that, "Hey, I'm hearing crickets. I'm not hearing anything. So maybe the timing's off here." And they might be able to help you even further. Or they might say, well get a little more creative and again, to your point, Leslie, call around the organization.

Leslie Douglas:

And say thank you.

James Buckley:

Ralph's best sales advice, "Be cool, man. Be cool."

Ralph Barsi:

You've got to be cool. I really mean that.

Leslie Douglas:

Don't be a jerk.

James Buckley:

Let's talk a little bit about dormant leads and opportunities because I think people sleep on this one.

Ralph Barsi:

Oh yeah. Well, it's funny, you mentioned the word sleep, because that's what happens. These leads go to sleep and they depreciate to the point where there's just no life in them. This is really a resuscitation operation. When you use dormant leads and opportunities as levers to pull, if you are, for lack of a better term, in dire need of building some pipeline, hitting your quota, getting some momentum going, you'll see the last bullet point talks about the analogy of in case of emergency, break glass and pull this lever.

Ralph Barsi:

Leaders on the call as well as individual contributors, you must have levers to pull in case of an emergency. You have to have a contingency plan in place. And more often than not, it's going to include inactive leads or closed lost ops. Leads that go 60+ days with no activity, the weeds have grown around them. There's a number of ways you can approach those leads saying, "Hey, it looks like we crossed paths several months ago." Or, "Someone from your business inquired about our offering and I'd like to kind of get back into the stream of conversation with you." There is a number of different ways that you can approach it. But don't let these slip by.

Leslie Douglas:

I like to look for what's changed since the last time we spoke. If you're going to go back in there, make sure you're reading the notes. Are there notes from the previous salesperson or from yourself saying why they didn't do anything? Did they just go dark? Did you never get in touch with them? Did they miss out on a meeting? Did they ever see a demo?

Leslie Douglas:

If they have and there were gaps, has anything changed with your product or your service since then that you can come back to them with? If not, I usually don't reference a previous failed attempt, but I know that there's some sort of interest in what we have to for. I think about how can I go about it in a different way. Typically, that comes to asking more questions upfront. How can I ask them more questions to make sure I'm tailoring what comes next to what they specifically need and care about and are looking for.

Ralph Barsi:

That's right. There's a lot of good... Yeah, go ahead, James.

James Buckley:

No, no. You got it, Ralph.

Ralph Barsi:

I was just going to say each message to Leslie's point has got to string together a narrative. So if you're sending a four messages, for example, to this person over a given period of time, you've got to make sure those messages are connected with the same narrative and the same thread. It's one way that I've seen work over and over again. It's not the way per se.

James Buckley:

Yeah. There's a storytelling aspect there that I think is crucial. Let's talk a little bit about upselling and cross-selling because I think sometimes people forget what sits closest to revenue. We think all things must be cold and that might be true, but it's not necessarily true if you're looking to rekindle flames and looking to add more value to existing accounts. So what about cross-selling and upselling is where people should be focused today?

Ralph Barsi:

Yeah. It's a great way to what Leslie was just talking to us about. Make sure you're revisiting the notes that are in your CRM, for example, in the opportunity record or the lead record, as well as email threads

because they will tell a story. If you're having trouble finding that, talk to your CSMs, talk to your account managers or the sales engineers or account executives that were involved in those initial conversations, because there was a problem or a critical business issue that obviously was identified in order for them to procure your services.

Ralph Barsi:

Find out what that problem was and I used the acronym par as in golf because it just keeps me on track mentally. I think about darkness that descended upon the land in this business. And then the action that took place. We were the heroes and heroins that arrived to bring results and to bring outcomes to the initial problem. If you're able to tell that story about how you took the problem to resolution, you're going to build that credibility and rapport we've been talking about and then that gives you an opportunity to talk about broader services, broader offerings and deepening the relationship between your two companies.

James Buckley:

It's good stuff.

Leslie Douglas:

A lot of times this stops at adding new products or new services and I think we think about what's the green space in terms of products and services that this client doesn't have. When you can think beyond that, are they connected? Is there a parent company that now they can make? It's a referral, but it is really... You're able to tell their story of an internal company and how we've made impact there, how we've helped them with our value statement, with our product, with our service and you can expand not just upsell, cross sell within this one piece of the organization, but broader than that.

Leslie Douglas:

You see it with equity companies, holding companies, you can do different locations if they make their own decisions. There's so many other things besides this one client's green space that we can dive into when it comes to upsell, cross-sell.

Ralph Barsi:

Yep. We've called it wallet share. You want to look at the wallet, if you will, or the pie and what sliver of the pie represents your offering in that business and where else you can drive systemic impact across the enterprise. You'll notice if you visualize it and draw it out on paper or on a whiteboard, where the gaps are and where the needs are for your offering.

Leslie Douglas:

Love a whiteboard.

Ralph Barsi:

Yeah, me too.

Leslie Douglas:

It's the best part.

Ralph Barsi:

Me too.

James Buckley:

Let me get a two in the chat, if you're a whiteboard fan. Are you a fan of whiteboards out there? Where you see whiteboards, you get excited. You run towards it with your marker? You carry around a marker with you. Are you a marker person? You've got your marker ready to go?

Leslie Douglas:

Definitely.

James Buckley:

Yes. That's good stuff. All right. Hey, so we appreciate you guys taking part in this poll. Most people favor one channel over another. These are very common results. What's happening is we gravitate towards the things that we like and not the things that make us uncomfortable or that we're not very good at.

James Buckley:

My, I challenge to you out there is to step towards the things that you might be a little less gifted at because that's where growth and development happens. That's where new skills can get developed and that is the stuff that's going to change your pipeline. I wanted to talk about LinkedIn lists, but you guys asked so many good questions. I want to leave plenty of time to get to the questions. So shout out to everybody that asked the question. You guys good with Q&A? Let's just run into the Q&A right now.

Ralph Barsi:

No, let's rock.

Leslie Douglas:

Yeah. We'll link you. In our follow up, we can link some of our previous LinkedIn webinars too that have all sorts of goodies.

James Buckley:

Yeah. While we're running through this Q&A, I'm going to put this last pull up because I think this is probably one of the most interesting ones that we've done. How do you actually qualify a meeting? That part, I think is super interesting. So I would love to get your opinions if you're in the room and you're interested in that one. That one there is a really specific poll that I think is fun. All right. Cam asks, "How do you suggest building a compelling event for your prospect to be motivated to meet when your product is an emerging technology, i.e, sometimes it can be viewed as a nice to have rather than a need to have?"

Ralph Barsi:

That's a really good question.

James Buckley:

It is a good question.

Ralph Barsi:

Start writing out some lists for yourself first as to how it could be a must have versus a nice to have. And then really, if you're just pinned to being a nice to have offering, what's so nice about it?

Ralph Barsi:

I would underscore what's so nice about it so that you can weave it into again, your narrative and weave it into the problems that it solves and think thoroughly about what life is like without your offering in a certain business. They're not able to do a certain project or establish workflow across different business functions or they're unable to retain people or recruit people or drive revenue in their organization.

Ralph Barsi:

If there's some way you can tie it to their bottom line and how business is being done in their operation, it's going to become a must have.

Leslie Douglas:

I play what I call the so-that game. I grab a whiteboard and is any people cross pollinate from like different departments, account managers like Ralph was talking about before. Grab a customer service, implementation, sales, grab a statement off your main marketing page. "We help X, Y, Z persona to..." And then just keep asking yourself, "So that what?" So that they can have more time. Okay. So that what? What does that time do for them? And just keep asking yourself so that what at the end and I know it sounds strange just without a good example here, but keep going deeper and deeper. What's the outcome to Ralph's point is going to be something that they need to have?

James Buckley:

Yeah.

Ralph Barsi:

Yeah. One exercise to dovetail what you just said, Leslie is the five whys exercise. Why would somebody want this offering? Well, because of this? Why? Well, because of this. Okay. Why is that? And you drill into root cause and when you're calling out root cause and relating it to the offering that you're here to give, you're going to be able to move the needle pretty quickly.

James Buckley:

Five whys. That's not bad. Hey, why? The why is really important. All right. Anonymous Attendee, shout out to you Anonymous Attendee. We appreciate you. They ask, "How excited do you have to be while talking to this prospect? Is it important to have more excitement while you're talking or do you just follow your own style regardless of who you're on the call with?"

Ralph Barsi:

That's a great question. Mirror and match is the way I have gone. If somebody answers the phone, "James Buckley." I'm like, "Hi James, Ralph Barsi." If James says, "Hey, good morning. This is James. How can I help you?" I'm like, "Hey James, good morning. This is Ralph. This is how I found you."

Ralph Barsi:

You mirror and match them. And then as you earn that credibility and rapport that we've talked about through the engagement, you can start to modulate how you're coming at them. They're likely going to modulate as well.

Leslie Douglas:

If they don't answer the phone, I would just like a 5% more than what you typically do because if you turn it up too much and you're trying to match James, you're trying to bring James' energy and that's not who you are, then you can hear it. Leave yourself a message. Because I used to be like, "I've got to bring James Buckley energy every minute." But that's not necessarily. We just bring different types of energy. That's okay. Leave yourself a message. Would you call yourself back? Great question.

Ralph Barsi:

I love it.

James Buckley:

Yeah. Would you call yourself back is a good question to ask. Gigi has a good one right here. Within a startup, referrals have been challenging as they gradually build their client base. Do you have any tips for referrals in that situation?

Ralph Barsi:

Yeah. I don't think it matters if you're a startup or a fledgling offering. People have worked with people for years and years. I think it's a matter of the relationships that they've developed that could at least get you a conversation started and use the conversation to ask for feedback.

Ralph Barsi:

Hey, we're an emerging technology, a fledgling company. We would love your feedback on this, that or the other. Do you think it would resonate with this type of audience? Do you think it would resonate with your company? There's a lot of ways you can approach that one.

Leslie Douglas:

If you're talking more about references and client stories than referrals in this case, because I think we sometimes use those words interchangeably, I might move your ask to before the close whenever you're closing. Just say, "Hey, it's a negotiation tactic. Can we touch base throughout this process as you're implementing so I can hear how this is impacting your business?" And take sound bites from that as you're going through. Yes. Can I get your feedback? Can I get your thoughts as we're going through? Yep, exactly.

James Buckley:

Feedback and thoughts. Go ahead, Ralph. No, no, you're fine.

Ralph Barsi:

I was just going to say, Leslie mentioned process and that's something that we want to make sure we're always underscoring as well. There's a former economist named Edwards Deming who said two cool

things about process. The first is if you can, cannot describe what it is that you do by way of a process, you do not know what you're doing.

Ralph Barsi:

Make sure that you're helpful to people in connecting the dots as to what happens next and what happens after that and here's why I'm asking you five more questions. This is what it's going to lead to. Always illustrate what the process looks like. The second thing that Deming said was every system is perfectly designed to get the results it gets. As we talked about earlier, if you're not getting a lot of response from people or people aren't finding you or your offering interesting, you've got to line check that system and make sure that it is perfectly designed to get the results that you want it to get.

James Buckley:

I like that. It's good. I did put the link to the Deming Institute right there for you guys to check that out.

Ralph Barsi:

Thank you James. Pardon my interruption, sorry about that earlier.

James Buckley:

No, no. I'm quick on the draw with that kind of stuff. It's good. Speaking of being quick on the draw, we always do like to give you guys as much value as possible. So alongside our friends at Chili Piper, we created a great guide for better handoffs from SDRs to AEs.

James Buckley:

This is an enormous challenge that many, many teams face every single day. You need this guide. Download this guide and have the best handoffs from your SDRs to your AEs as possible. All right, real quick, let's get a couple more questions in. What is the key to efficiently balancing relevance and personalization while being able to scale at the same time? Buddy, if you find the answer to that question, you should just stop coming to these and sell it for millions and millions of dollars. But let's give them a couple of things. What do you got, Ralph?

Ralph Barsi:

Yeah. I'm with you. We'll just all stop doing what we're doing if you find that silver bullet, but it goes back to what we talked about earlier, where it's really important now to at least wrap your arms and your mind around who's your marketplace, who's the ecosystem or what is the ecosystem that you're working within and then start to break it into chunks.

Ralph Barsi:

Download, not download, but sort by persona or title. Sort by location, sort by industry, sort by offering, et cetera, et cetera. You can break it up into a lot of pieces and then tailor your messaging and your outreach to those different topics that I just mentioned or headings.

James Buckley:

Leslie, what do you got?

Leslie Douglas:

If you have to choose one, I would say be relevant to their title, you're connecting with more people, you're able to have a better conversation and impact the things that they care about in their job, rather than the surface level connection that we have from something like, "Hey, you watch football. So do I." That one's not a good one for me. Maybe the bad example for me. I watch commercials on football, but rather than having that surface level connection, let's connect over something that's in their business. If you have to choose between the two, I would go that way.

James Buckley:

Ralph, what's the best way for people to reach out to you?

Ralph Barsi:

Subscribe to my blog, ralphbari.com. Hit me up on LinkedIn, Ralph Barsi. Follow me on Twitter @RBarsi. I answer every message I get. It takes me forever sometimes, but I will get back to you if you ping me, especially as we talked about on LinkedIn. You've got to send a note with your invitation to connect.

James Buckley:

Leslie, how do you like to be reached out to?

Leslie Douglas:

You can find me on LinkedIn, but I also know my Instagram handle. I just put it in the chat because talking underscore with underscore Leslie doesn't roll off the tongue as nicely. I should probably work on that.

James Buckley:

That's probably a good one to follow on Instagram though. Leslie's got a gift when it comes to the content, you'll really enjoy it. Make sure you're following us on Instagram @JBSalesTraining, all one word and become a member today. Invest in yourself. I'm not sure why that link didn't come through, but we invite you guys to become a member at JB sales.

James Buckley:

You can get access to our Slack channel, where you have access to all of us all the time, 24/7. We will respond as soon as possible. As long as we're awake, someone will get back to you. And then you also get access to the biweekly Ask Me Anything sessions. These are live. They are not recorded. You can bring real deals to the table here. Join us, check it out, invest in yourself, get access to the training, the courses, the webinars, the podcasts. If it's there, you've got it.

James Buckley:

So we look forward to seeing you as a member. It's a dollar a day, yo. Invest in yourself. Join jbsales.com. Anything you guys want to throw out there before we let everybody get back to selling today?

Leslie Douglas:

If we didn't get to your question, come find us on LinkedIn, Ralph and I will both be happy to respond.

Ralph Barsi:

We will-

James Buckley:

Yes, we'll be answering questions from this webinar in the Slack channel.

Ralph Barsi:

Cool. Yeah, everybody's been super generous with their time today. Thanks for spending it with us and we hope this was useful.

James Buckley:

I want to give you guys one more chance to join us next week for the game changing one-on-ones webinar. Make sure that you sign up for that one. If you handle one-on-ones with your team, or if you're a team member that attends one-on-ones, this will be extremely helpful for everyone in the room.

James Buckley:

Thank you, Ralph. Thank you, Leslie. We appreciate you guys coming out and sharing all your wonderful insights. Thank you everybody for coming. Make sure that you take the takeaways from this and put them into practice. None of this matters if you don't go and change something about what you're doing. And no matter what you do, make sure that you make somebody smile today and make their day because that is going to give you the fulfillment more than anything else that you do. Thanks everybody. We'll see you next week when we bring someone else to help you sell better.

Leslie Douglas:

Thank you.

Ralph Barsi:

Hey, less than an hour.

James Buckley:

We made it happen.

Leslie Douglas:

Less than an hour.