



Welcome!

Session 1:

Honing Your Skills

BEFORE WE BEGIN

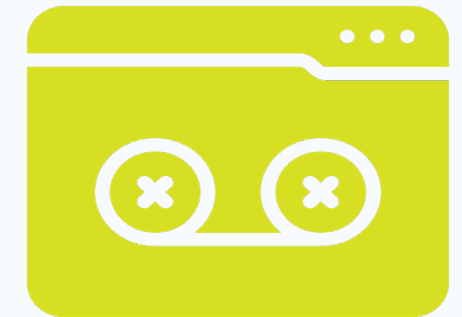


Closed captioning is available in the Zoom menu bar.



Post your questions in the Q&A pod.

Use Chat window for comments + to connect during the webinar!



A recording and slides will be shared.

Our Host:



Steve Henke


Founder & CEO, Harpeth Marketing



SALES SUCCESS IN MARKET RESEARCH: ESSENTIAL SKILLS, STRATEGY & INTEGRATION



Effective Email Sales Tactics



EMAIL IS NOT DEAD, BUT NEEDS REFRESHING

01. Rethinking Emails Tactics

02. State of the Email as a Tactic

03. Keys to Success

04. CRM vs. Personal vs.
Automation

05. Tips for Success

TONS OF EMAILS

330+B

**Emails SENT globally
per day**

Our inboxes are brimming and we don't have enough time to read, respond and reengage

121/63%

**Avg. Corporate Emails
Received per Day
&
Percentage of people
checking business emails
on the weekends**

We read and respond to 46 emails on the weekends

33,800

**Avg. Corporate Emails
you get internally and
externally**

Who do you get more emails from – internal people or clients & prospects?


20+ per
day

**Minimum Number of
emails a Business
Development Rep sends
per day.**



TARGETING is CRITICAL

01. Cold Contacts
02. Warm Contacts & Referrals
03. Existing & Past Clients
04. Frequency, Cadence, Expectations
05. Specific Calls to Action



Proven Tips to Get Emails Opened

01. Excellent Subject Lines (7 words or less)
02. Less than 250-300 words in the body
03. Signatures on ALL emails
04. Personalization (AI tools)
05. Specific Calls to Action
06. Easy to Click links to more content
07. CC: and BCC: Usage



Avoid These Barriers to Success

01. Spam Filter Settings

02. Attachments

03. Mobile vs. PC vs. Other Devices

04. CRM Rules & Protocols

05. Slow or No Responses & Opt-Outs

06. Automation

07. No editorial calendar



Next Steps: Rethink

- Set proactive email outreach goals (SDRs goal = 20 per day)
- Use AI to help test and draft emails (speed)
- Graphics & Visuals (new design templates)
- Seek feedback (What's working? Priorities?)
- What's Most Effective?: Email vs. Other Contacts Types (Client Preferences)
- Monitor "open rates" if possible (measure)
- Humor works (differentiation)



QUESTIONS OR COMMENTS?

Get in touch & stay in touch via email! LOL

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How to NAIL Your Pitch Presentation

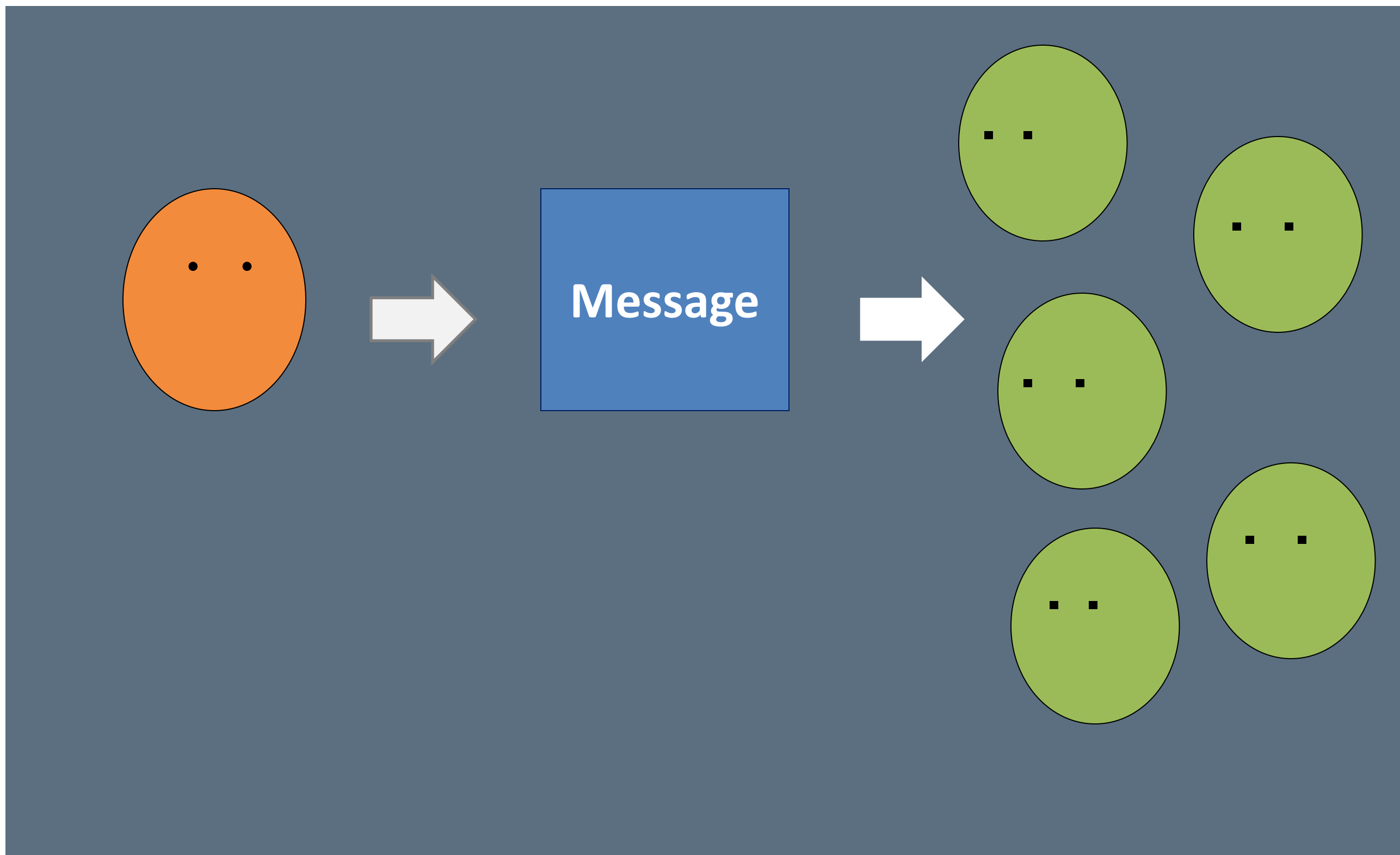
Debbie Fay

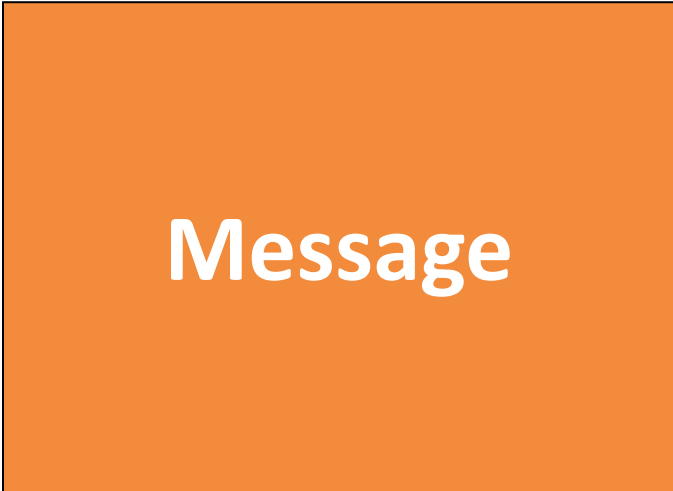
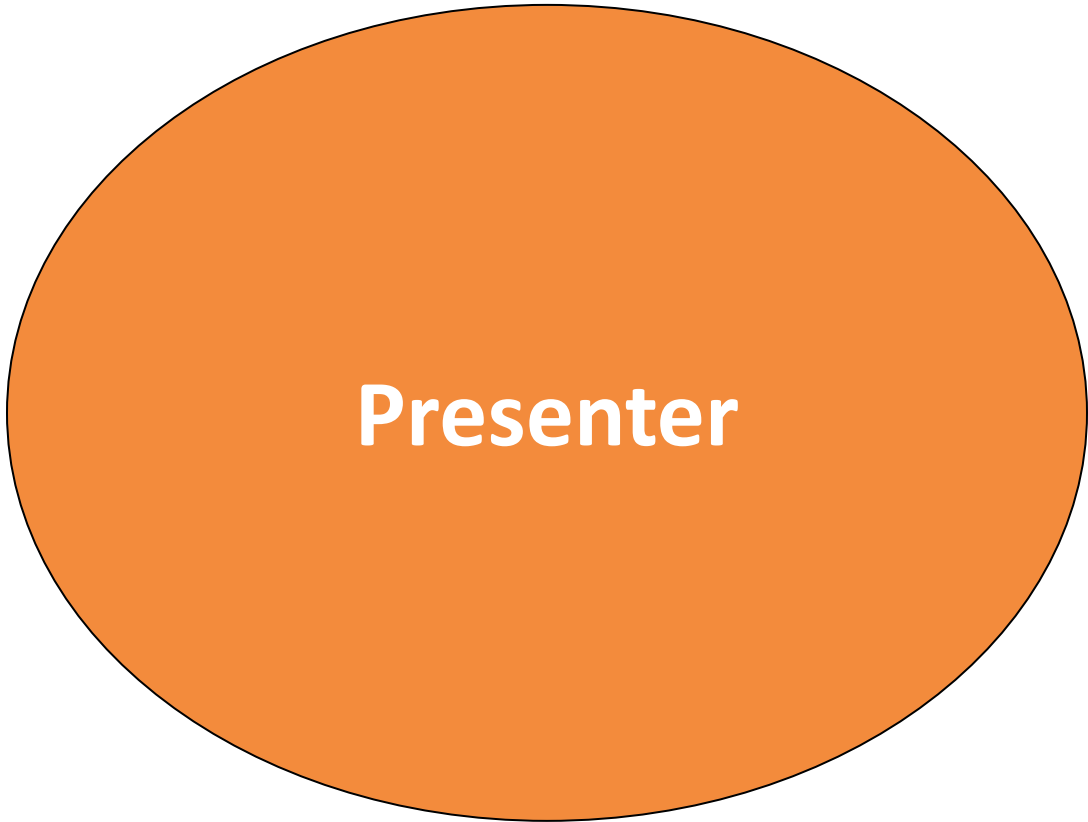


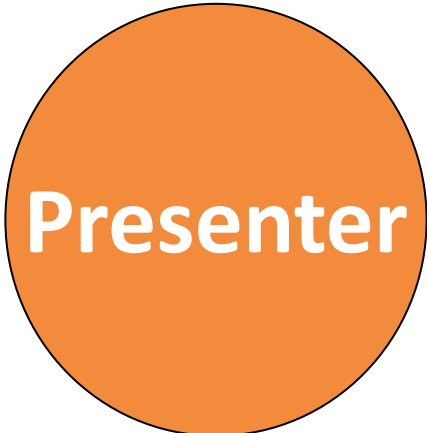
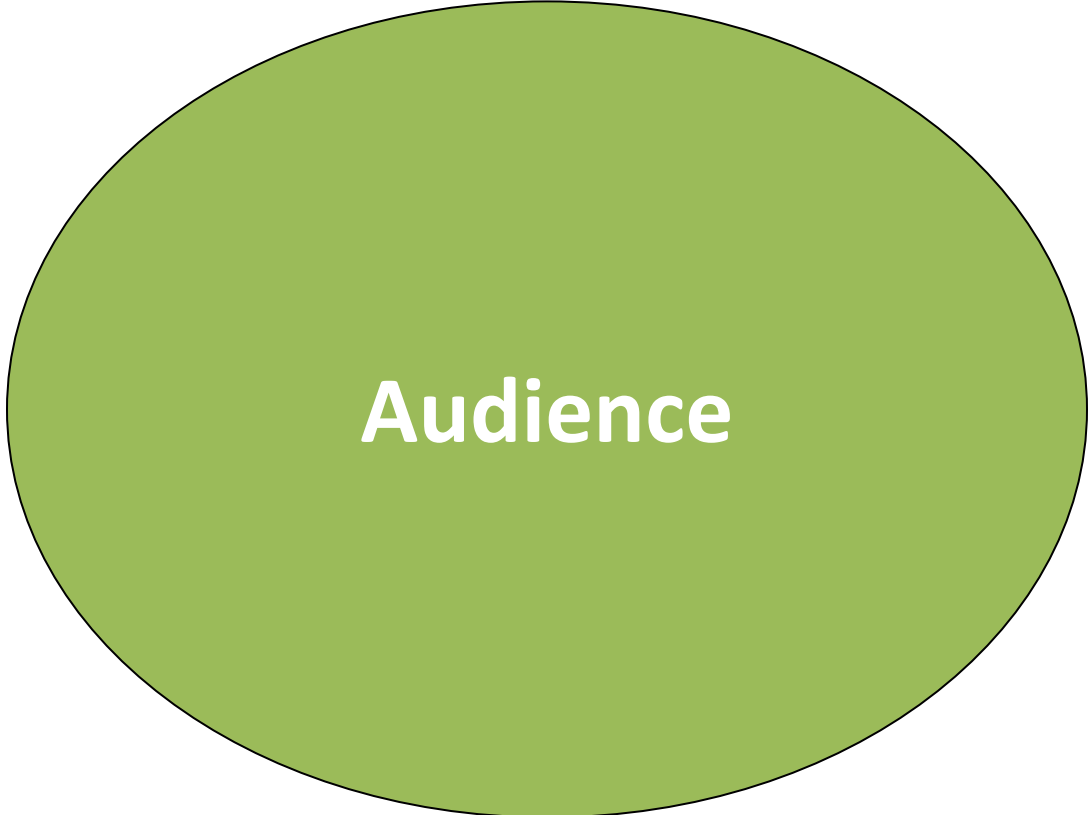
Kwami Lewis



Presentation components

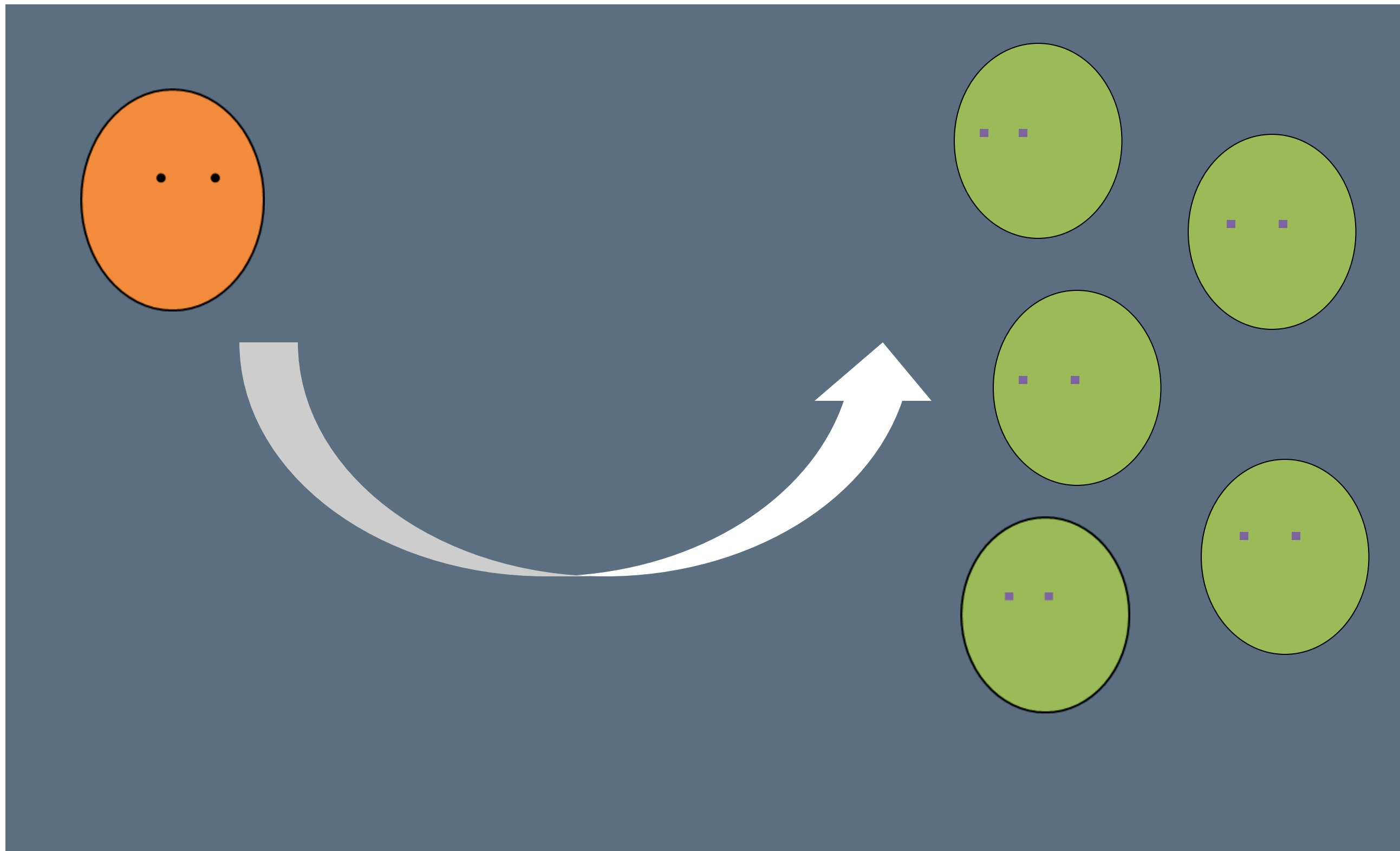




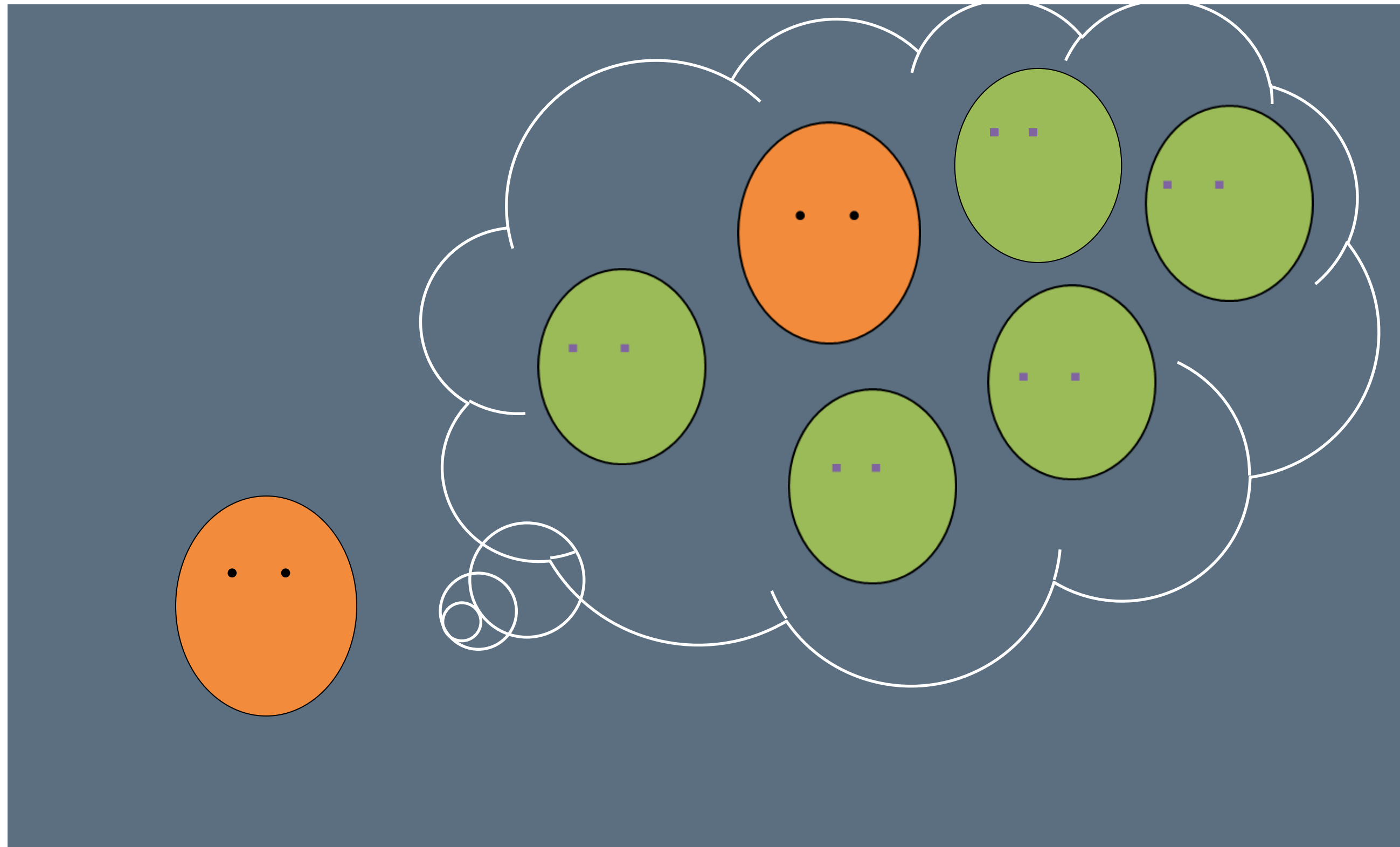


The Audience

Turn your focus 180°



Turn your focus 180°



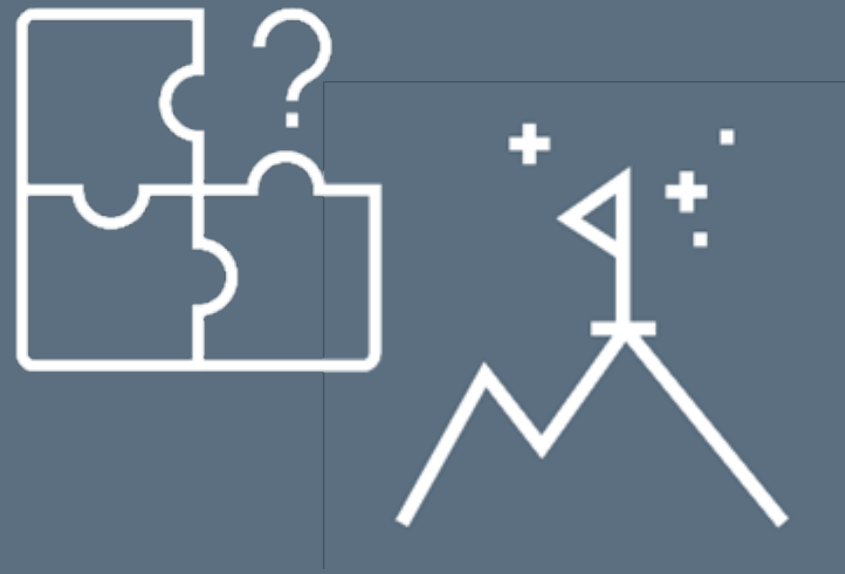
Discovery



Ask questions

The Message (pitch)

Make it compelling



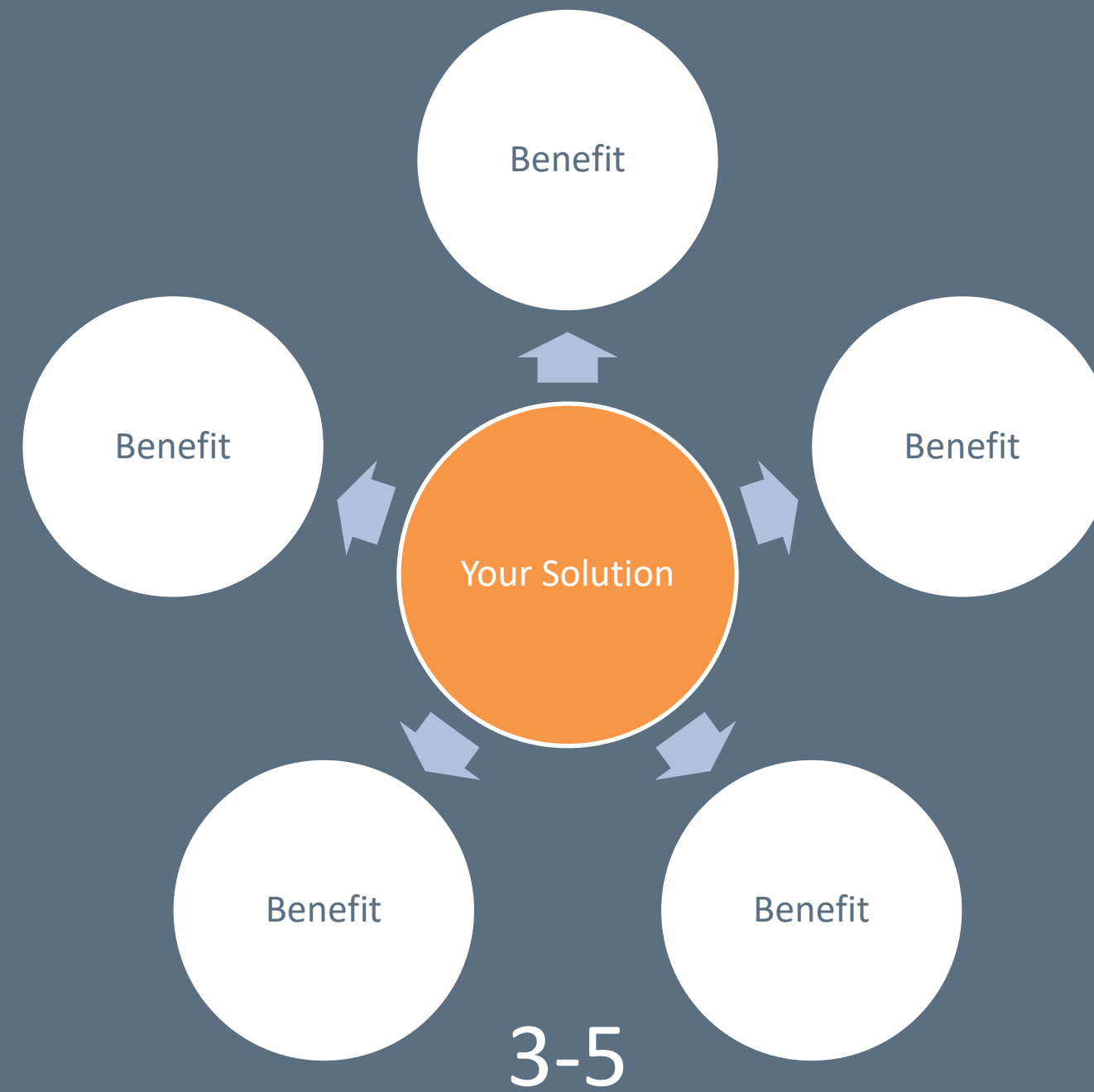
Paint the picture:
Problem/Goal

Make it convincing



Your solution

Make it convincing



the message



bespeaking their language

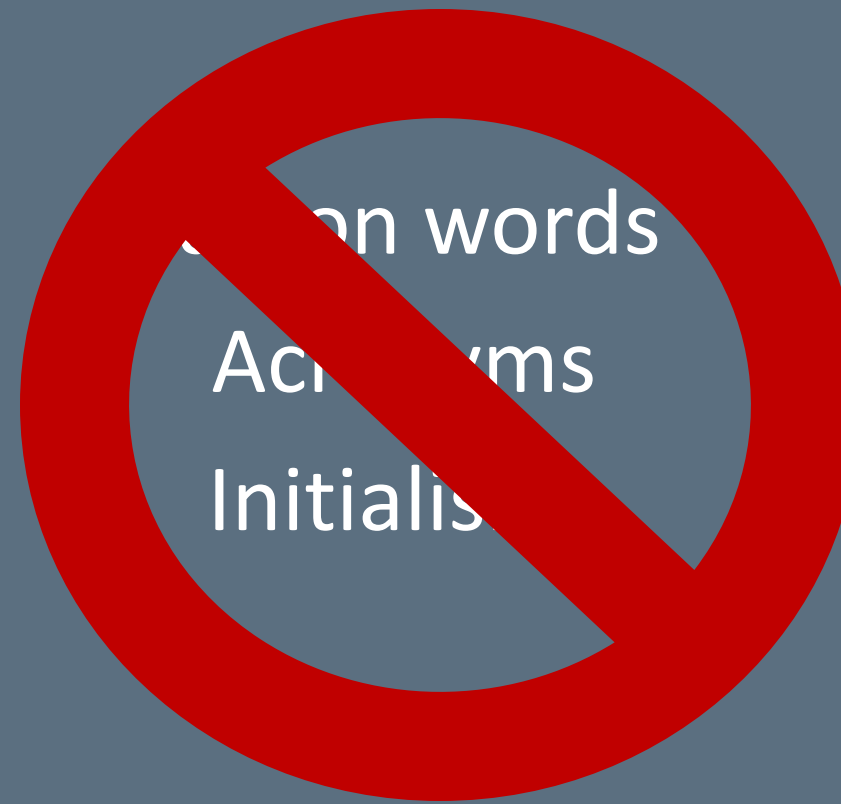
bespeaking their language

Jargon words

Acronyms

Initialisms

bespeaking their language



Tell 'em a story



Beginning
Problem / Goal



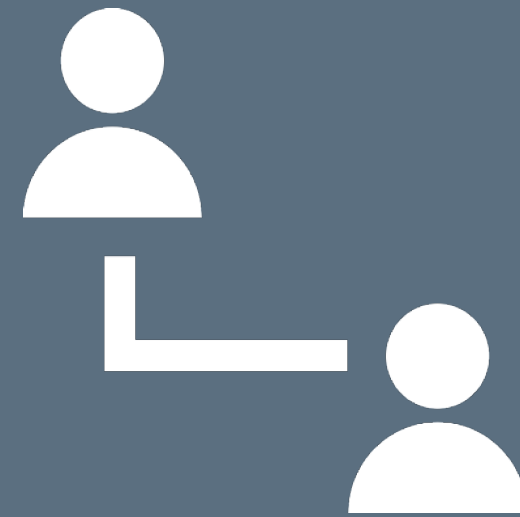
Middle
Solution



End
Result

The Presenter

Be connecting



Eye to eye

Know your stuff



NO reading



NAIL IT



PRACTICE OUT LOUD

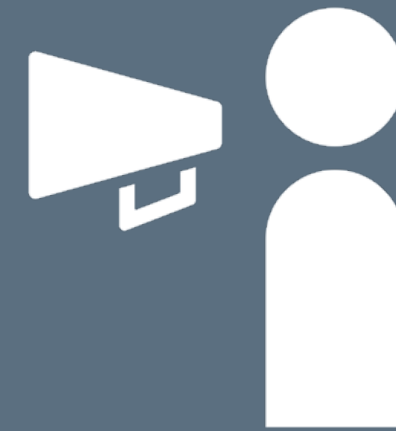
Take-aways



Turn your focus 180°



Solve a
problem



PRACTICE
OUT LOUD


Questions?



Best Practices

Exhibit Booths/Conferences

Providing a human-to-human experience in a B2B world



The work begins before the conference

- The “Secret Sauce”
- Do your research
- Schedule meetings and appointments
- Plan your conference days
- Know your elevator pitch; leave room for authenticity
- Know your lead management options
- Arrive early for meetings, sponsored events, exhibit booth duty, etc.
- Network, network, network
- Know your follow-up strategy



QUESTIONS OR COMMENTS?

Get in touch!

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SALES SUCCESS IN MARKET RESEARCH: ESSENTIAL SKILLS, STRATEGY & INTEGRATION



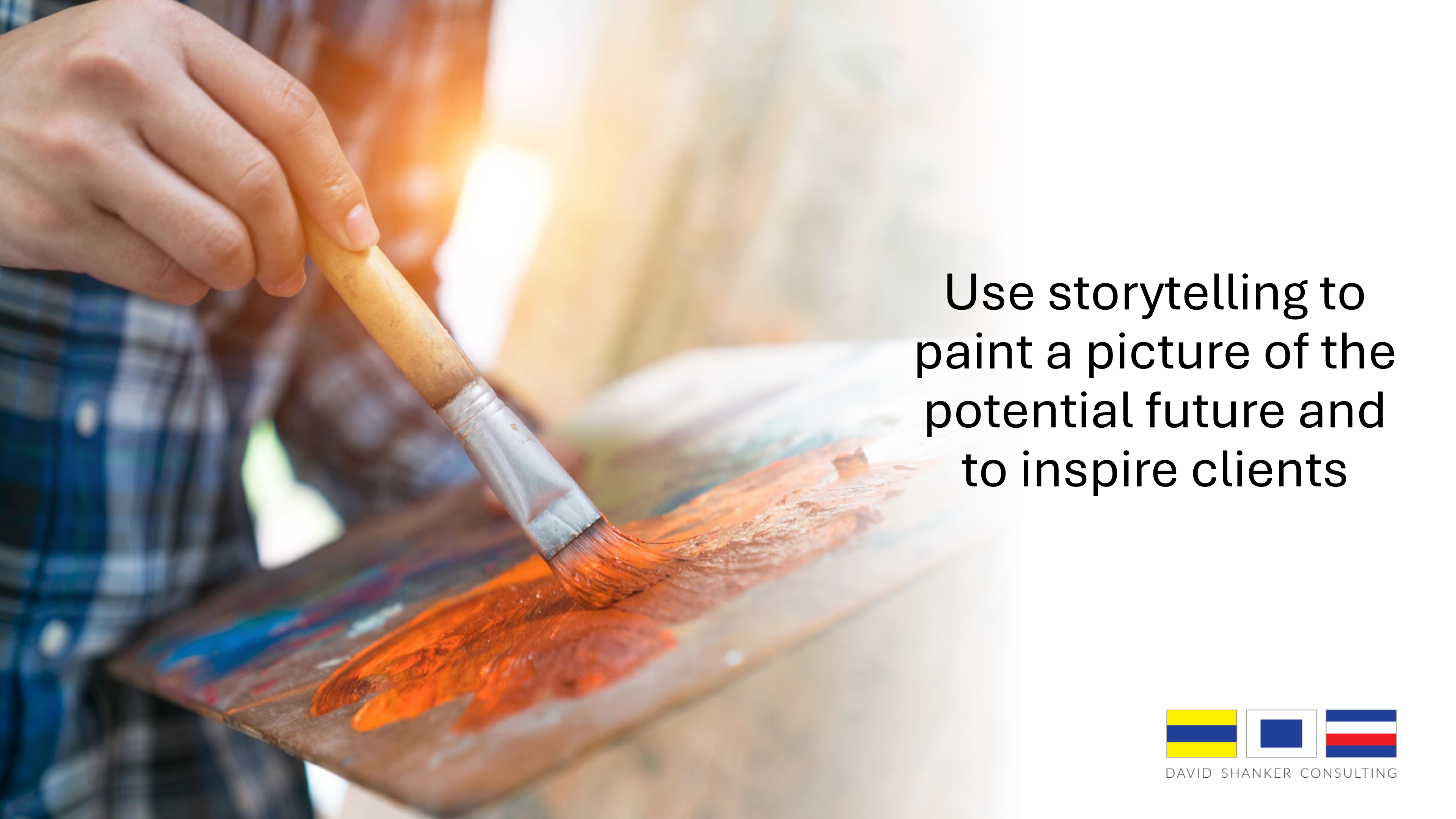
INSIGHTS ASSOCIATION

Building Client Relationships

November 2024



DAVID SHANKER CONSULTING

A close-up photograph of a hand holding a paintbrush with a wooden handle and a metal ferrule. The brush is applying a thick, vibrant orange paint to a wooden surface. The background is softly blurred, showing more of the wooden workpiece and a person wearing a blue plaid shirt. The overall scene is well-lit, suggesting a bright, natural light source.

Use storytelling to
paint a picture of the
potential future and
to inspire clients



DAVID SHANKER CONSULTING

Why Story Telling?

Stories are memorable


Stories exact emotion

People are persuaded by examples, stories and illustrations

People are suckers for a good story (Hallmark Movies)

People remember Stories





You can always use words to tell stories

To be extremely **memorable**, you can use activities

- build lego's
- draw pictures on whiteboard
- be a mime
- Use multimedia
- play charades

While this will feel awkward at 1st, you will surely differentiate yourself



Story Example I

Good

- Smith Research inspires our clients by discovering tiny nuggets of insights that give you unparalleled insights to change the trajectory of your business
- And we recently did just that for X Company by uncovering something important about their core consumer that they had overlooked

Bad

- We are a full service market research agency
- We have expertise in the Finance, Automotive & CPG Verticals
- We are 35 years old and are the 16th largest MR Agency in the US



Story Example II

9

2,000

7,000,000

15



Developing a Personal Brand



DAVID SHANKER CONSULTING

When colleagues and clients think of you –
what are the 1st 3 words that they think?



Is this accurate?



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What 3 words would you use to describe yourself?



Tools to develop your personal brand

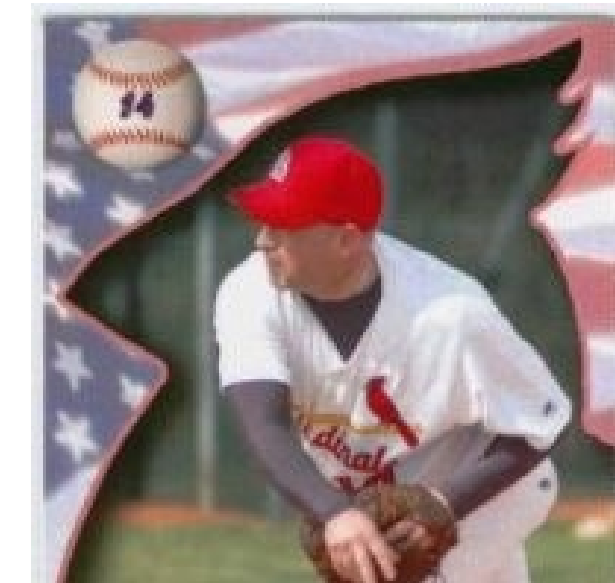
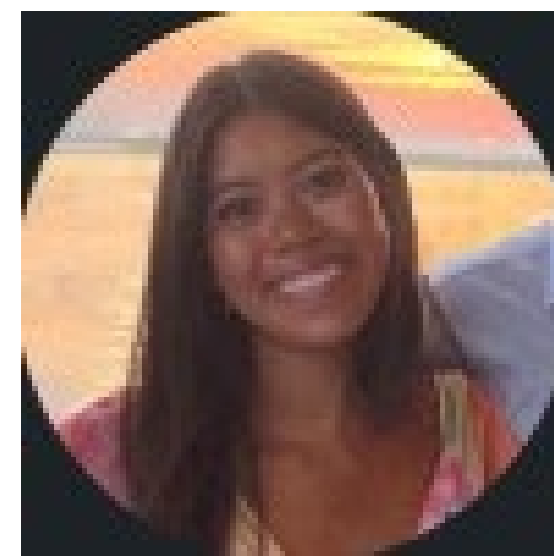
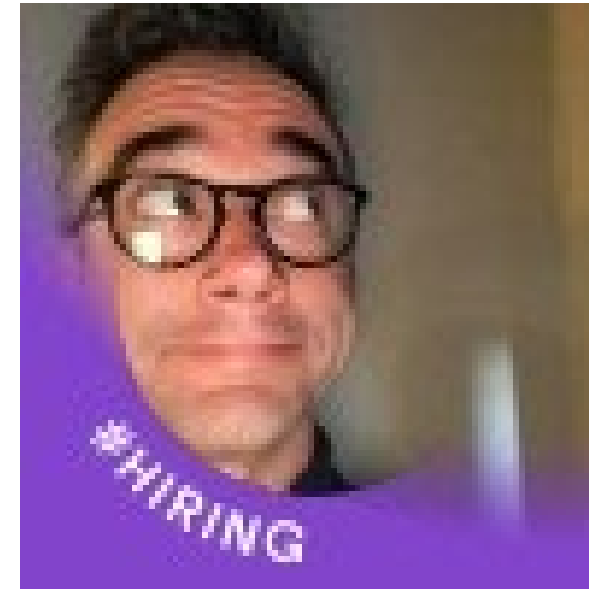
- LinkedIn Posts
- X (aka Twitter) and/or Threads
- Instagram
- Industry Presentations
- Blogs
- White Papers
- Podcasts



LinkedIn

- What does your headshot say about you?
 - Corporate
 - Fun
 - Smiling
 - Stern

- What type of background are you using



What is your LinkedIn Headline?

Strategic Business Planning and Consulting

Content Specialist for Seven Letter, Boston MA

Serial entrepreneur with multiple PE backed exits. Board Director and investment banker in the data, insights, and analytics sector.

Chief Evangelist at FMG Suite | Marketing + Finance+ Tech | Investment News 40 Under 40 | WealthManagement.Com “10 to Watch” | ThinkAdvisor Luminary. Follow me for marketing strategies to grow your advisory firm 🚀

I help companies improve their sales performance | Advising CEO's and Sales Executives

Stuff I've built is used by thousands of companies including 75% of the Fortune 500.



DAVID SHANKER CONSULTING



Serial entrepreneur with multiple PE backed exits. Board Director and investment banker in the data, insights, and analytics sector.



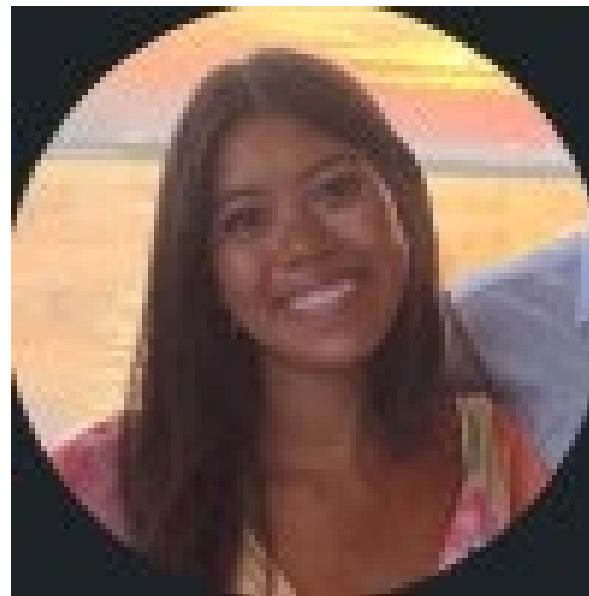
Strategic Business Planning and Consulting



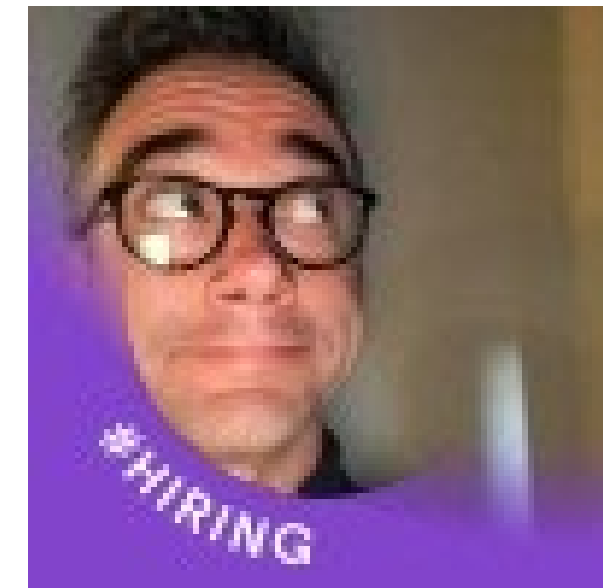
Chief Evangelist at FMG Suite | Marketing + Finance+ Tech | Investment News 40 Under 40 | WealthManagement.Com “10 to Watch” | ThinkAdvisor Luminary. 🚀



I help companies improve their sales performance | Advising CEO's and Sales Executives



Content Specialist for Seven Letter, Boston MA



Stuff I've built is used by thousands of companies including 75% of the Fortune 500.

What do you post on LinkedIn
(or do you even post)



Industry Presentations

A missed opportunity to develop and reinforce your
Personal Brand



Industry Presentations

- Know the Conference schedule
- Have a client partner
- Submit briefs for every conference with your client partner
- Co-develop your presentation
- Be a Star and more importantly, help your client partner be a **BIGGER STAR**





Habits To Keep You Top of Mind

HP
HEYWOOD
— PAIGE —

Create A Repeatable Structure for Client Touches



Client Touch Points



Phone Calls



LinkedIn



Email



Snail Mail

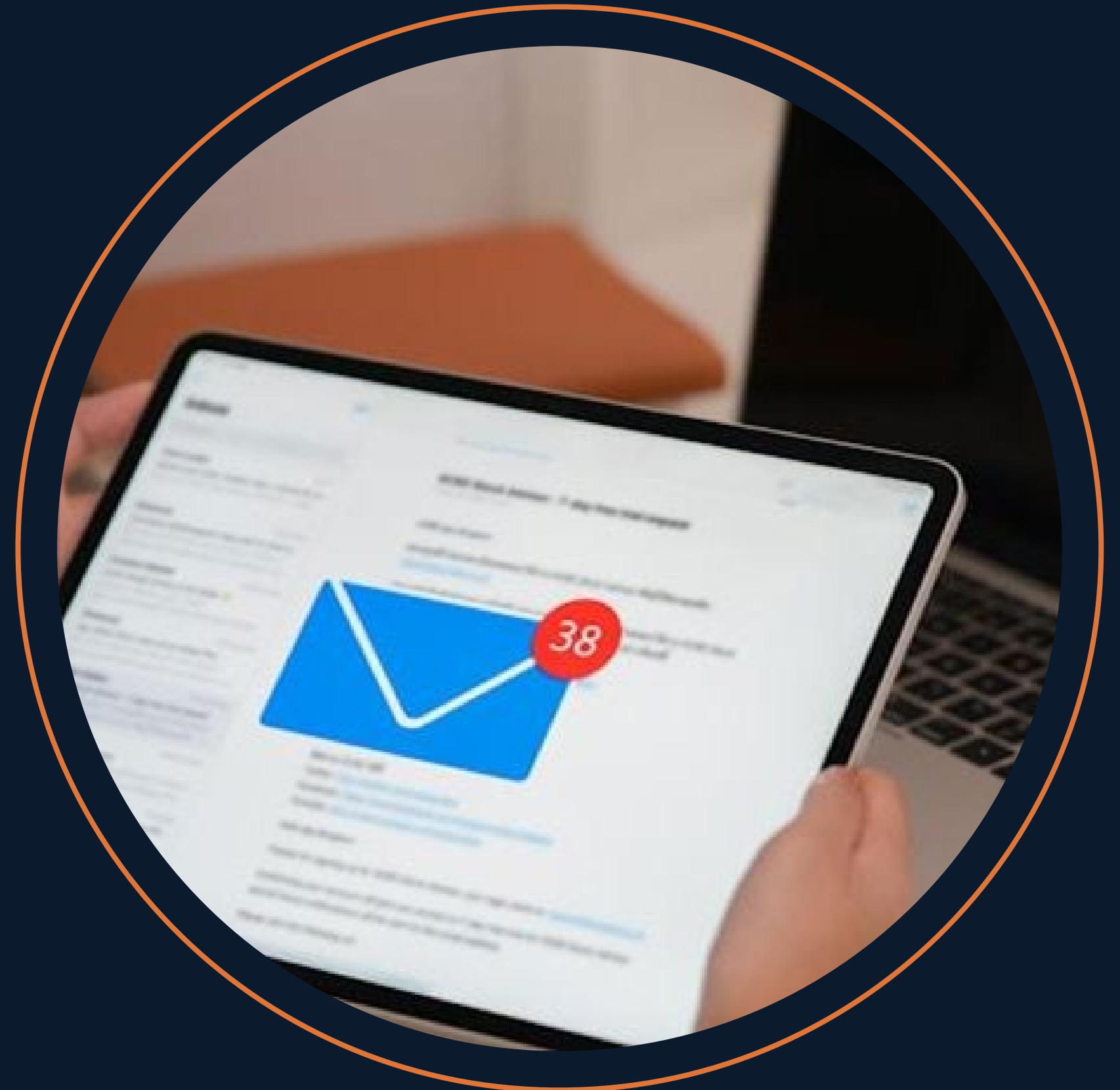
“This Is a Relationship Call.”

- Ask Questions
- Show Interest
- Do Not Sell



Email & Use A Great Subject Line

- It's About Them
- Use Their First Name
- Add Value
- Refer To Former Discussion



Examples of Subject Lines

- Alice, I Was Thinking About You This Morning
- Rob, How'd That Presentation Go?
- Kwami, I Think You'll Enjoy This
- Wow! This Is Amazing. It Made Me Think Of You.



...ts
Comments Vid

ave in common is a passion for learning so it was really fun kicking off sessions with you this afternoon. Looking forward to being your course tutor and learning with you over the next few weeks. **Olivia Askew Sophie Perkins Margaret Mariani Anna Keszthelyi Emma Woodley Sarah Van Horn Anna Schwartz Jamil Farhat** **Richard JIAKUN W**

Reach Out On LinkedIn

- Connect with Current, Past Clients, & Prospects
- Listen
- Like, Comment, Share
- Post & Tag People








Send Snail Mail

- Holiday Greeting Cards
- Handwritten Thank You Notes
- High Brand Engagement



Schedule It

Day / Date	Time	Client	Touch Points	Topic
Monday Nov. 11	11:00 AM	Karen Walker		Her Vacation
Tuesday Nov 12	11:00 AM	Lucy Ricardo		Send MRx Infographic
Wed. Nov 13	11:00 AM	Darren Stevens		Share ESPN Post
Thursday Nov 14	11:00 AM	Ralph Kramden		Holiday Card
Friday Nov 15	11:00 AM	Norm Peterson		Beer

The 3 Most Effective Habits to Leverage LinkedIn



Casual Users: Cultivate These 3 Habits

01



Schedule LinkedIn
Time Regularly



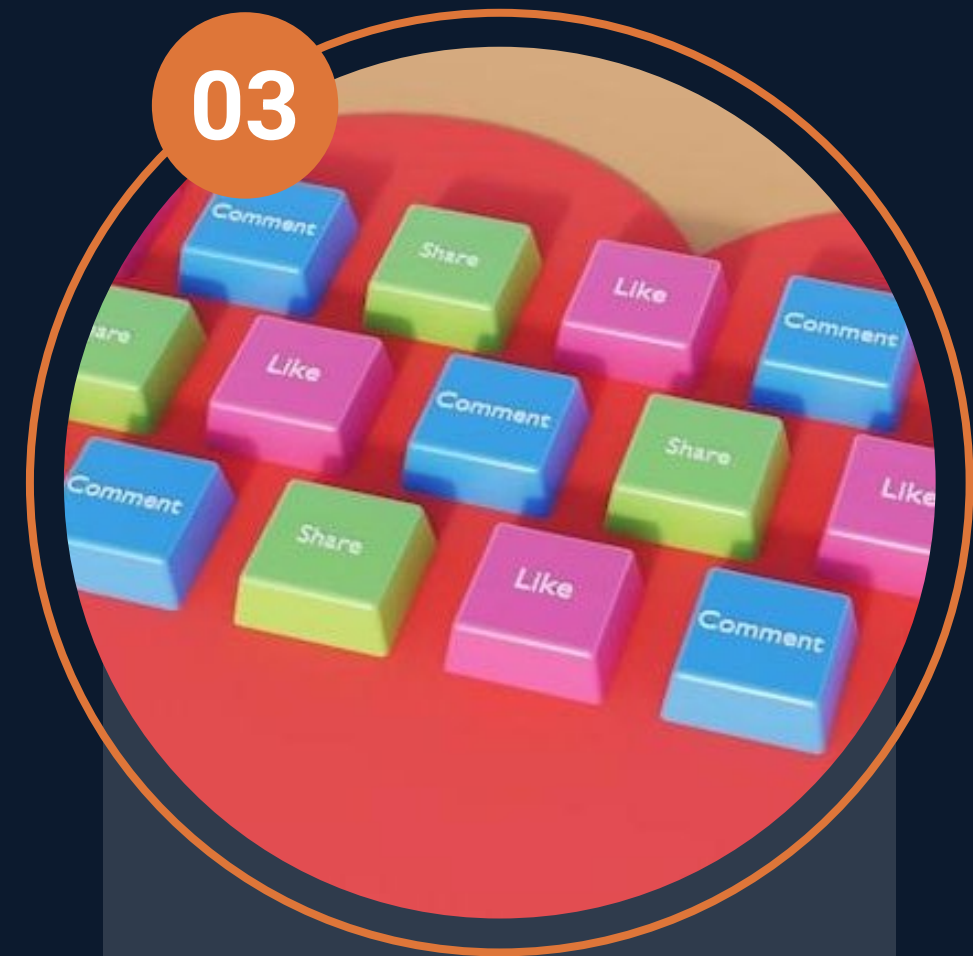
02



Connect with Current
& Past Clients, &
Prospects



03



Listen &
Like, Comment, Share

Strategic Users: Cultivate These 3 Habits

01



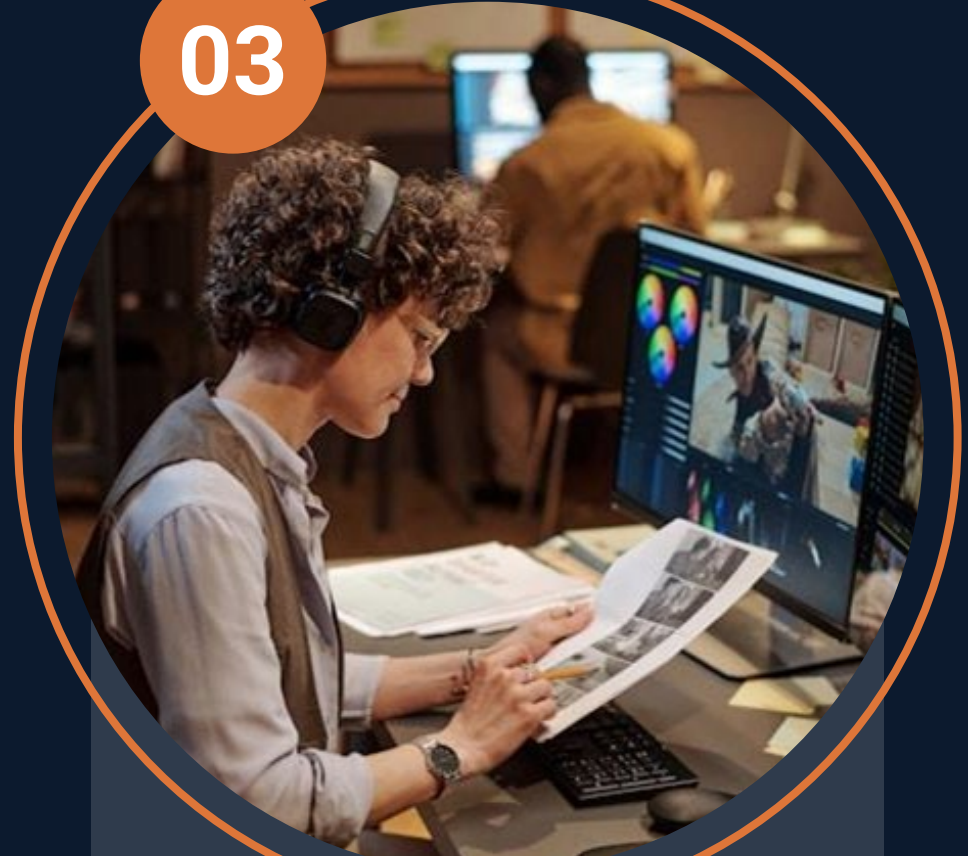
Optimize Your Profile

02



**Identify Your Top 50
Sales Targets**

03



**Curate, Create,
Publish & Tag Content
for the Top 50**

Leverage LinkedIn for Lead Gen Infographic



LinkedIn Lead Gen

Unlock the lead generation power of LinkedIn with deliberate, strategic action.

1



Write Down Your Goals & Objectives

What's the big goal you are trying to achieve this year? Write it down. Then think through all the steps (objectives) you will have to complete to obtain your big goal.

2



Optimize Your Profile

Craft a compelling headline and summary, and about section that aligns with your goals and objectives and highlights your expertise, differentiators, and value propositions.

3



Identify Your 50 Targets & Relevant Groups

Join relevant groups. Connect with the top 50 people you want to do business with. Include current, past, prospective, and aspirational customers.

4



Create Targeted Content

Listen to the conversations of the groups and your top 50 targets. Think through the questions buyers have at each stage of the buyer's journey. Create compelling, relevant content that addresses your target's interests, questions, and challenges.

5



Like, Comment, Share

Use hashtags to find relevant topics. Like, comment, and share genuinely in groups and in discussions to build relationships. Always add value.

6



Use DMs

After engaging at least three times with a target, use direct messages to offer more value.



Lead Generation

Budget at least one hour a day to these LinkedIn tasks and you will have a powerful lead generation engine.

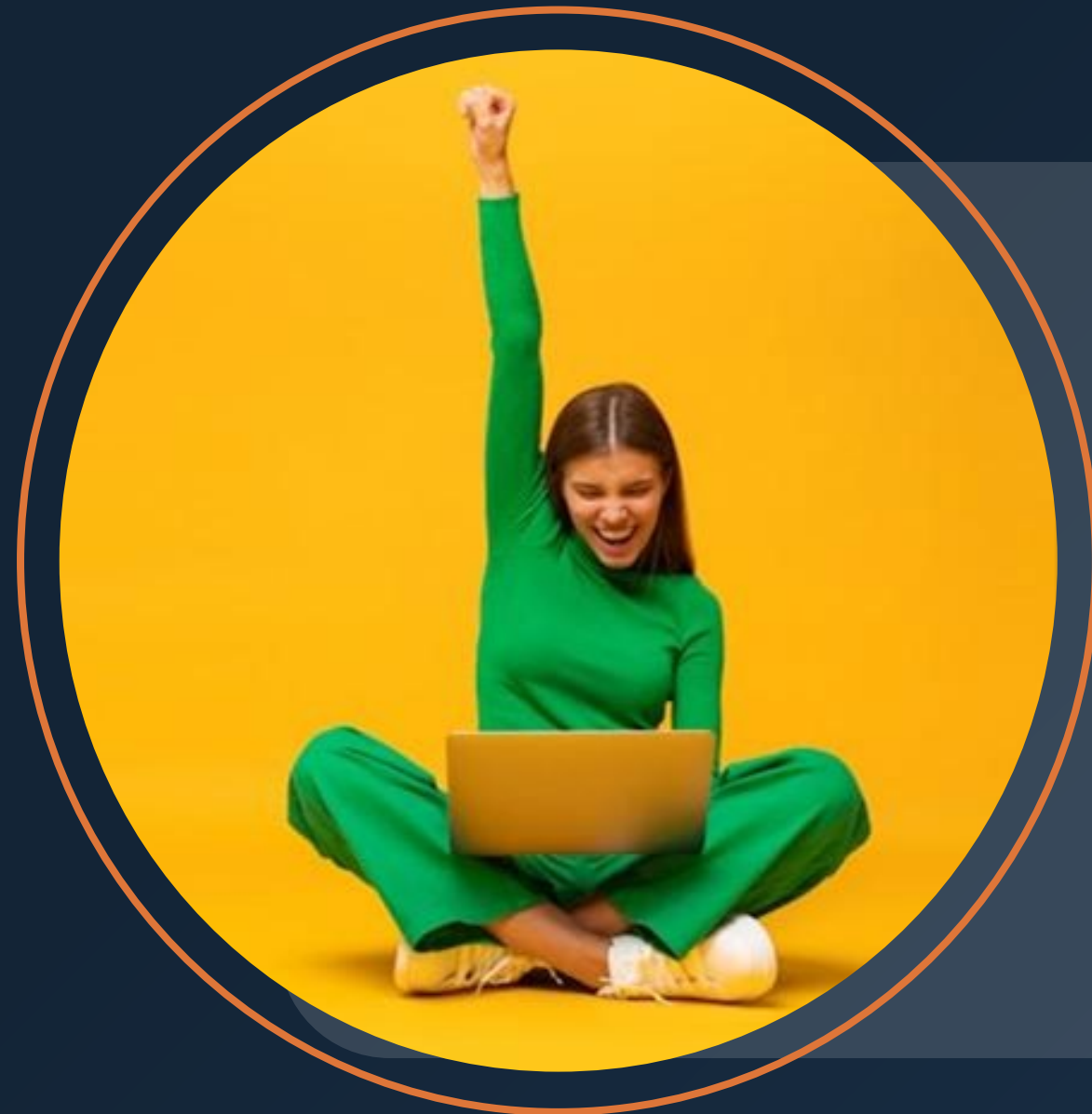
Want personal instruction on how to create your LinkedIn Lead Generation engine? Contact Marilyn Heywood Paige at mhp@heywoodpaige.com for virtual classes, coaching, and team training.



How to Leverage LinkedIn for Leads

Session I: Optimize Your Profile

TAKE THIS CLASS FOR FREE



In this FREE Session You will:

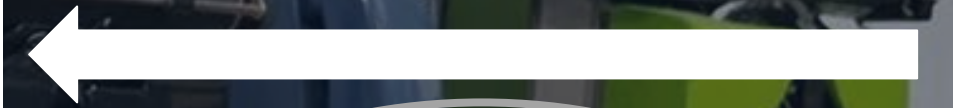
- Identify Your Goals
- Develop Objectives
- Learn How to Optimize Your
 - Banner
 - Headline
 - Photo
 - About
- Examine Good & Bad Examples of Each



Let's Stay in Touch



Get Your Freebies Here!



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LinkedIn

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idea

F O R U M

December 3 & 4 | Online



SALES SUCCESS IN MARKET RESEARCH: ESSENTIAL SKILLS, STRATEGY & INTEGRATION



UP NEXT:
Sales Management
November 12