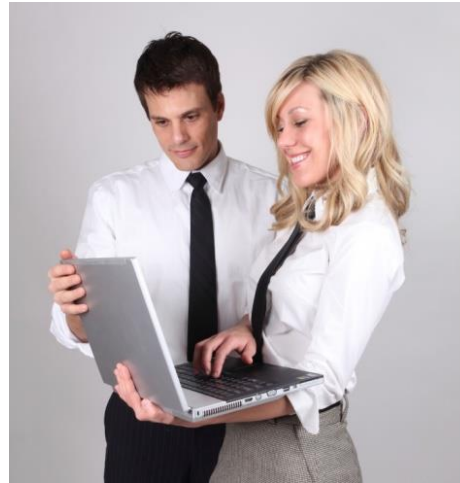


# 21<sup>st</sup> Century Prospecting Secrets!



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from Great to  
**Extraordinary**

**PPAI EXPO**  
#ppaiexpo

# Agenda

- The purpose of prospecting
- 5 Steps to prospecting success
- Identifying your ideal prospects
- Online search secrets
- Gaining your most wanted prospects interest
- Putting it all together



# Rule # 1 Understand the Purpose



- The purpose of prospecting is to create enough interest and attention so that the prospect will want to have a conversation with you.

# How Has Prospecting Changed?



# What Does That Mean to You?



# Know What Buyers Care About



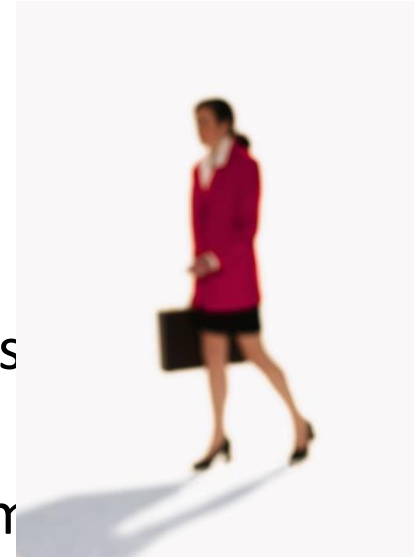
# 5 Steps to Prospecting Success

- **Target-** Decide on a niche or vertical market
- **Research-** Before you contact
- **Engage**
- **Qualify**
- **Timing**



# Step# 1 Target Effectively

- Have a Plan: Make a Top 10 List!
  - Who are your best prospects?
  - What industries, what vertical markets
  - What job titles do they have?
  - Where are you most likely to find them
- **Who don't you want?**





# Step # 2 Research (Before Contact)

- Their website
- Google and Google Alerts
- Business Journals
- Manta
- Business Trade Associations
- Social Media: LinkedIn<sup>®</sup>, Twitter, Facebook
- People who may know them

# Company Website

The screenshot shows a web browser displaying the homepage of Abington Jefferson Health. The browser's address bar shows the URL [www.abingtonhealth.org](http://www.abingtonhealth.org). The website header features the organization's logo, which includes a stylized head profile and the text "Abington Jefferson Health" and "HOME OF SIDNEY KIMMEL MEDICAL COLLEGE". Navigation links for "About Us", "News", "Contact Us", and "Ways of Giving" are present, along with a search bar. A dark teal navigation bar contains the following menu items: "SERVICES & SPECIALTIES", "FIND A PHYSICIAN", "FIND A LOCATION", "PATIENTS & VISITORS", "HEALTHY LIVING", and "CLASSES & EVENTS". The main content area is a large banner for "Maternity" services. On the left, the text reads: "Maternity" in a large font, followed by "Abington – Jefferson Health is one of the region's leaders in maternity services." Below this is a green button labeled "Maternity services". On the right, a photograph shows three smiling pregnant women standing together outdoors. At the bottom of the banner, there is a row of seven small green squares, with the second one from the left being white. Below the banner, a light green bar contains three icons and labels: a checkmark icon for "Quality", a person icon for "Clinical Trials", and a book icon for "Academic Programs".

# Use Business Journals

The screenshot shows a Windows Internet Explorer browser window. The address bar displays the URL: <http://www.bizjournals.com/baltimore/blog/lists/2012/12/top>. The page title is "Top of the List: Baltimore's fastest-growing private companies - Baltimore Business Journal". The browser's search bar contains the text "Top 100 fastest growing companies Baltimore".

The website header includes the "BALTIMORE BUSINESS JOURNAL" logo, a "Sign In" link, a "Register" link, and a search box. Below the header is a navigation menu with options: Home, News, People, Events, Exclusives, How-To, Buy, Find, Jobs, Contact Us. A secondary menu includes: Blogs, Premium, Companies, Industries, Video, Photo Galleries, Entrepreneurs/Innovation, Press Releases, My News.

The main content area features a large banner for "KatzAbosch" with the tagline "EXPERIENCE YOU CAN TRUST" and contact information: "410-828-CPAS (2727) | katzabosch.com". Below this is a section titled "TOP of the List" with the subtitle "A sneak peek at the BBJ's weekly Lists." and a "News Made Easy" sign-up prompt.

The article title is "Top of the List: Baltimore's fastest-growing private companies", dated "Dec 7, 2012, 7:30am EST" and updated on "Jan 18, 2013, 7:32am EST". The author is "Carolyn Proctor". A sidebar on the right contains an advertisement for "KatzAbosch" with the tagline "Experience You Can Trust" and lists services: Accounting & Tax Services, Construction & Real Estate, Business Valuation & Litigation Support Services, Government Contracting, and Medical Practice Services. Contact information is "410-828-CPAS (2727) | katzabosch.com".

# Manta: Free Business Research & Connections

The screenshot shows a Windows Internet Explorer browser window with the URL <http://www.manta.com/profile/my-companies/select?referid=109t>. The browser's address bar shows the search term "Manta". The page header features the Manta logo and the tagline "Where Small Business Grows™".

The main content area is titled "Get Listed on Manta. It's Free!". Below this is a form titled "Tell Us About Your Company (All Fields Required)". The form includes the following fields:

- Country:** A dropdown menu with "Select a Country" and a note "(U.S., Canada, U.K. and Australia only)".
- Company Name:** A text input field with a note: "As you type your company name, we'll check to see if it exists on Manta. If you see it listed, select it. If not, we will add it. Any incorrect information may be changed later."
- Street Address:** A text input field.
- Phone Number:** A text input field.
- Zip/Postal Code:** A text input field.

Below the form is a question: "What is your relationship to this company?" with three radio button options:

- I'm the owner of this company.
- I work for this company.
- I don't work here, but I'm acting on behalf of this company.

To the right of the form is a section titled "Manta helps you..." with a list of benefits:

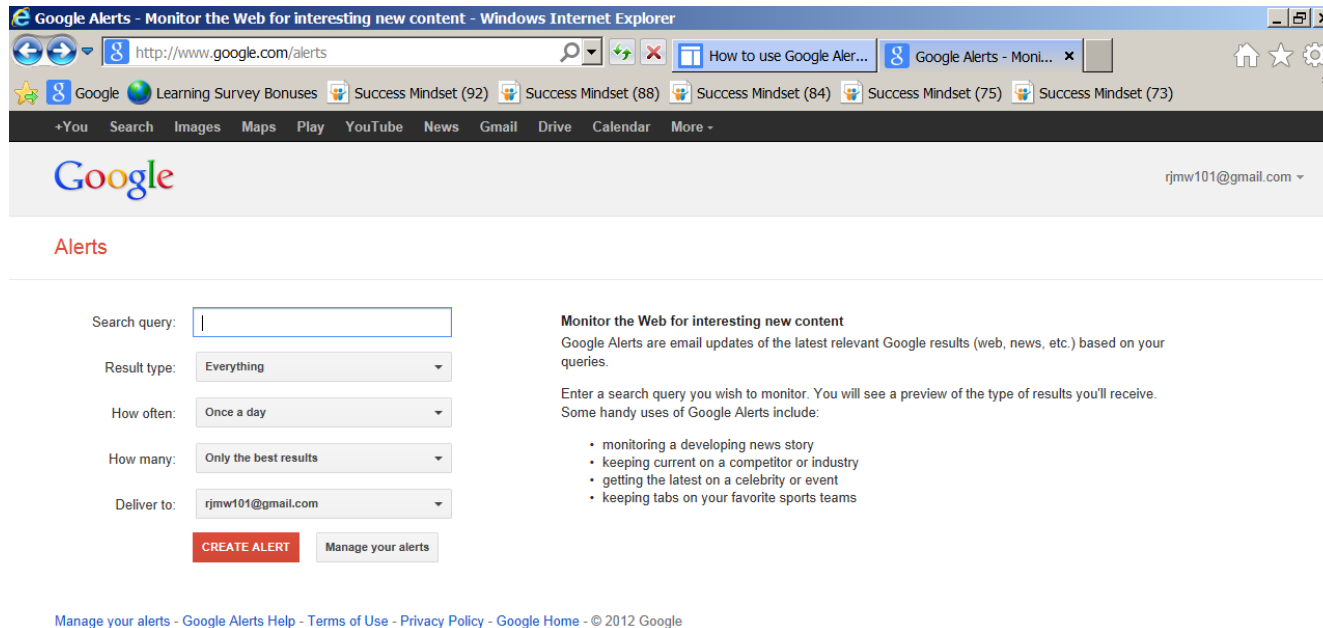
- Be found by customers and prospects
- Promote and drive traffic to your business
- Get stats on who is visiting your profile
- Make business connections

Below this list are three testimonials, each with a small profile picture:

- Paige of Dine With 9 Catering in Los Angeles:** "Since claiming our profile, our website traffic has doubled. One of our largest customers came from Manta."
- Mario of mariotrains.com in Winchester, VA:** "We created our Manta profile and the impact was immediate. Within days we were getting triple the web sales."
- Lisa of IMAGE in Tampa, FL:** "Since claiming my company profile on Manta.com, I get dozens of calls a month. I've never been busier."

# Set up Google Alerts

## www.google.com/alerts



The screenshot shows the Google Alerts setup page in a Windows Internet Explorer browser window. The browser title is "Google Alerts - Monitor the Web for interesting new content - Windows Internet Explorer". The address bar shows "http://www.google.com/alerts". The browser has several tabs open, including "How to use Google Aler...", "Google Alerts - Moni...", and several "Success Mindset" tabs. The Google logo is visible at the top left, and the user's email address "rjmw101@gmail.com" is shown at the top right. The main heading is "Alerts". Below this, there is a form with the following fields:

- Search query:
- Result type:
- How often:
- How many:
- Deliver to:

At the bottom of the form are two buttons: "CREATE ALERT" (in red) and "Manage your alerts". To the right of the form, there is a section titled "Monitor the Web for interesting new content" with the following text:

Google Alerts are email updates of the latest relevant Google results (web, news, etc.) based on your queries.

Enter a search query you wish to monitor. You will see a preview of the type of results you'll receive. Some handy uses of Google Alerts include:

- monitoring a developing news story
- keeping current on a competitor or industry
- getting the latest on a celebrity or event
- keeping tabs on your favorite sports teams

At the bottom of the page, there is a footer with the following text: "Manage your alerts - Google Alerts Help - Terms of Use - Privacy Policy - Google Home - © 2012 Google"

# Focus on Trigger Events

*The art of being in the right place at the right time*

## Company Merger or Name Change



# Trigger: New Product Launches



# Trigger: Event Sponsorship





# Trigger: Employee Retention or Recruitment



# Step # 3 Engage

- Send a value based message or dimensional mailing
- Connect on LinkedIn and Social Media
- Prepare a Special Report for your Target Market



# Connect By Offering Solutions...

- *Would you like MORE & BETTER QUALIFIED LEADS AT YOUR TRADE SHOW BOOTH?*
- *HERE'S A PROVEN WAY TO REDUCE WORKPLACE ACCIDENTS...*
- What if you could GET TWICE AS MANY PEOPLE to test drive your cars?



# Use Direct Mail with Promo



- Choose creative packaging that makes recipients want to open your mail.
- Communicate a message with a promo product that's timely, creative and interesting.

# Step # 4 Ask for a Meeting and Qualify

- Do they have an immediate need?
- Are they the decision maker?
- Do they have an ongoing need for promotional marketing?
- Do they value your ideas or are they just looking for the lowest price?
- Would you enjoy working with them?


# Leverage LinkedIn®


## Have a Professional Profile and Photo

Interested in your Ed.D.? - Earn yours - 100% online in as little as 3 years for under \$20k at ACE! Ad ...

**Rosalie Marcus**  
THE PROMO BIZ COACH™

*Ready to start or grow a highly profitable promotional products business? Let's connect!*



**Rosalie Marcus**, Promotional Marketing Expert  
Proven Resources & Help to Quickly & Easily Grow Your Promotional Products Sales.  
Ready to get started? Let's connect!  
Promo Biz Coach.com • Penn State University  
Greater Philadelphia Area • 500+ 

I help people in the promotional products industry, entrepreneurs and marketing and sales professionals stand out, get noticed and attract much more business using fresh sales strategies, inbound and outbound marketing and cu...



[See more](#)

**Add new profile section**

Edit public profile & URL

Add profile in another language

Get the latest jobs and industry news

   
Rosalie, explore relevant opportunities with Huntsworth Health

[Follow](#)

**See connections (500+)**

**Contact and Personal Info**

Rosalie's Profile, Websites, Phone, Email, Twitter, and Birthday

[Show more](#)

People Also Viewed

Messaging

Your Dashboard  
Private to you

All Star

03:37 PM  
12/25/2017

# Have Keywords in the Headline

The screenshot shows a LinkedIn profile for Seth Weiner, MAS. The headline is "Marketing Pro | Health, Wellness & Safety Program Expert | Purveyor of Useless Trivia". Below the headline, the profile lists "Sonic Promos • Ithaca College" and "Washington D.C. Metro Area • 500+ &". The profile also includes a "Message" button and a "More..." button. On the right side, there is a "See connections (500+)" section, a "Contact and Personal Info" section, and an advertisement for MRP (Marketing Research Professionals) with a "Follow" button. Below the advertisement, there is a "People Also Viewed" section with profiles for Jay Shaplin, MAS and christina sawhney. The bottom of the screenshot shows a Windows taskbar with various application icons and a system tray with the time 03:39 PM and date 12/25/2017.

# Use the LinkedIn Search Function

The screenshot shows a web browser window with the LinkedIn search results for the query "Marketing Independence Blue Cross". The browser's address bar shows the URL: [https://www.linkedin.com/search/results/index/?keywords=Marketing%20Independence%20Blue%20Cross&origin=GLOBAL\\_SEARCH\\_HEADER](https://www.linkedin.com/search/results/index/?keywords=Marketing%20Independence%20Blue%20Cross&origin=GLOBAL_SEARCH_HEADER). The LinkedIn navigation bar is visible at the top, with the search bar containing the query. The search results list four profiles:

- Hannah Kim** • 2nd  
Medicare Sales and Marketing Support Specialist at Independence Blue Cross  
Greater Philadelphia Area  
1 shared connection  
[Connect](#)
- Michelle Kelly**  
Channel Manager, Consumer Marketing at Independence Blue Cross  
Greater Philadelphia Area  
[Send InMail](#)
- Diana Quattrone** • 2nd  
Public Relations Manager at Independence Blue Cross  
Greater Philadelphia Area  
Past: Director of Media Relations at Fox Chase Cancer Center and Jeanes Hospital (both part of the Temple University Health System)  
4 shared connections  
[Connect](#)
- Erin Thurston, MBA** • 2nd  
Marketing Director at Independence Blue Cross  
Greater Philadelphia Area  
1 shared connection  
[Connect](#)

At the bottom of the results, there are pagination links (1, 2, 3, 4, 5, 6, 7, 8, 9, 10) and a "Next >" button. An advertisement for "Bachelor of Business Admin" is visible at the bottom left, and another advertisement for "ACE Virtual Info Session" is visible at the bottom right. The Windows taskbar is visible at the very bottom of the screen, showing the time as 04:24 PM on 1/14/2018.



# Make Connections on LinkedIn

- Don't use the generic: Send a personalized message to each person.
- *It was great seeing you at the chamber meeting yesterday. Congratulations on making The Top 100 Companies list. Let's stay connected. Please join my LinkedIn Network.*

# Step #5 Timing

- Contact for several weeks in a variety of different ways always providing value.

Direct mail- Lumpy Mail

Phone call

Email

LinkedIn

Virtual Sample or Promotional Gift

Interesting Article, Research Paper

- Contact: Tuesday through Friday: *Best time to reach decision maker: before and after normal business hours*



# Offline Prospecting

## Network Strategically:

Where can you meet your best prospects?

- Professional Organizations
- Trade Shows in Which They Participate
- Business Journal Awards Dinners
- Alumni Associations
- Current Clients Give Referrals



# More Offline Prospecting



Form alliances with complimentary businesses:  
-printers, graphic artists, trade show display.

## **Create Referral programs:**

- Be specific about who you would like to meet
- Practice what you preach...
- Establish a gift for referral program

# Keep at It



- Never stop prospecting.
- Mark time on your calendar every day.
- Follow up fast with all good prospects and referrals.
- *Don't forget your current clients are great prospects for referrals, alliances and more business.*

# To Sum Up

- The more you know about your clients needs, the better chance you have of creating sales opportunities
- Use Google Alerts to trigger sales
- Use LinkedIn® to make powerful connections
- Use Direct Mail with Promo
- **Provide value that's important to your clients and prospects and watch your sales grow!**

# About Rosalie Marcus



Rosalie Marcus, The Promo Biz Coach™, *teaches promotional products sales professionals how to sell more at higher profit margins to better clients.*

**Get a FREE Special Report *10 Proven Ways to Thrive in Promotional Products Sales at:***

**[www.promobizcoach.com](http://www.promobizcoach.com)**

**Contact [Rosalie@promobizcoach.com](mailto:Rosalie@promobizcoach.com) 215-572-6766**

Please complete your session evaluation now to receive credit for session attendance.

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