Why ERPNext:

ERPNext is a suite of integrated modules used to collect, transact and report on data from their business activities. It enables the flow of information between the different parts of a company and with outside stakeholders like customers and vendors.

Benefits:
- Eliminates information silos
- Automates and standardizes business's core processes
- Enables better decision making by mining the processes and real-time reports on data
- Prioritize security and compliances - Our robust rule- based features restricts the access of sensitive data
- SaaS based model and low cost of ownership, hence, bigger ROI and more perceived value
- 100% open source and highly customizable as per businesses policies and processes, ensuring compliance and govt. regulations

SDR's Onboarding:

The first thing you need to do is, understand the process and get familiar with our CRM. I have seen people getting confused between Qualification Call (QFC) and Discovery Call (DC). Learn the difference. understand what are the agendas of these calls. Also, people are struggling to generate basic reports. So when you start your journey as an SDR, first, understand the steps of our sales process, different DocTypes that we use, navigation around our CRM, creating various reports, etc.

Here are the steps of our sales process:

1. Lead Assignment (SDR)
2. Lead Qualification (SDR) (Qualified / Unqualified)
3. Discovery call (SDR + Account Executive (AE)) (Accepted / Rejected)
4. Demo (AE)
5. Opportunity Creation (AE)
6. Query / Multiple demo sessions (AE)
7. Negotiation (AE)
8. Legal (AE + Legal Team)
9. Proposal (AE)
10. Closure (AE)

Now the main part starts. A lot of points come from Sandeep, some are from other team members and some are of my own personal understanding. I will break it down stage-wise.

Sign off on the pitch:

- Before you start taking up leads, you have to learn the sales script and get your sign-off done. This will arm you with proper ammunition to handle objections, ask problem-based discovery questions, understand the intrinsic motivation of the buyer, etc.

- Practice the script, schedule peer-to-peer role plays, take feedback, improvise on it and get your sign-off done. You won't be hitting the road until you complete this.

Lead Qualification:

- **Prioritize:** You really wanna be cognizant about who you spend your time with. Be very picky when it comes to taking up the leads to dial. Check the lead score for that matter, see the source of the lead. (Contact Us leads over trial accounts), understand what's the company size, etc.

- **Background Research:** Don't blindly dial the numbers. Do some background research about the prospect and also about their company. Visit their LinkedIn profile, company website, etc. It will not take more than 2-5 minutes but will give you something to break the ice on the call.

- **Establish Mutual Beneficial Agreement (MBA):** Get that okayness from the prospect at the start of the call. Tell them that it's' okay to say no and we can also do the same, without hurting each other's feelings. This will help lower their guards. You will learn more about this in the pitch part.

- **Pitch Practice:** Practice the pitch really hard. People say that scripts don't work. But they do if executed properly. You don't wanna sound robotic. Don't just say sentences because they are there in the script. We are going to ask a lot of questions so it's really important how you frame your sentences as well. It should not sound like one of those Teacher - Student viva. Humanising the conversation is really important here.

- **Acknowledge the answers:** When a prospect is answering your question, usually the thing that goes in the back of our head is "What's gonna be my next question?" (Since we are following a script.) Due to that, we don't pay enough attention to what the prospect is saying and once their answer is over, we just shoot another question. Don't do that. Listen to the prospect carefully and be genuinely interested in understanding their problem. Here is an example, let's say that prospect just explained their pain points. According to the script, the next question would be "How is it impacting your business?". Instead of asking this question directly, say something like "Thanks for the detailed explanation about your challenges. Now I have a really good understanding of what you are going through" (Frame it in a better way). Something along those lines and then go for the next question.;

- **Add your personal touch:** Script is just for your reference. You don't have to say things exactly how it's written there. Add your personal touch. Understand where to use what sentences and how to use those sentences. I have seen people trying to copy sentences that there in the script and they didn't come off very nicely and sounded really bad. If you wanna do that, practice it, record it, see how it sounds, and then use them at the "right time". BUT DON'T PRACTICE ON PROSPECTS.

- **Qualify them out:** The job of an SDR is to arouse curiosity. Change your mindset, the goal of the qualification should not be to set up a DC. I personally try to identify all the possible ways why this particular deal can go south. Be genuinely interested, try to learn about their processes and challenges, see if there is even a need for an ERP, identify those red flags. This will drastically improve your Sales Accepted Lead (SAL) ratio.

- **Outcome-oriented:** Focus on quality, not quantity. One can pass 10 opportunities from 15 DCs and one can also do the same from 10 DCs. We all are smart enough to judge what's the better option. Ultimately it's the outcome that matters.

Discovery call:

- Communicate the agenda of the call with the prospect properly. Make sure that they are not expecting a demo on the discovery call.

- Make sure to share all the details about the lead with your AE well in advance. Also talk about what all things are already discussed in the Qualification call so that we don't end up asking the same questions again.

- Give a call 1 hour prior to the meeting, confirming whether the meeting is on. If the meeting is on, rename the Title of the meeting with adding "Confirmed" at the beginning and send the invite again. This will ensure that your invite is at the top of their inbox and also it sends a solid message that they are committed to showing up. This will increase your show rate drastically.

- Don't end the DC without agreeing on the next step. Block the calendar on the same call itself.

Some other points:

- **Take notes:** Most important one. Take detailed notes of each and every conversation. Add those notes in the comments section so that a proper sequence is maintained. If you want to update the same in the Follow up table, do that too. Taking notes is really important because if anything goes wrong, you can go back to those notes to unstick a deal. Saying "Didn't we agree on this?", "Didn't you tell me how important it was?", "Didn't you tell me you are losing x amount of revenue because of this?", etc.

- **Hygiene of the data:** Whenever you make a call, or send an email or do a qualification or there is any progress, update those relevant fields accordingly. At every step, make sure you are changing the status and stages. Even if your call is unanswered, or the prospect did not show up, make a note of it. Use the Follow-up table for tracking those activities. This will help us create good quality reports and create a better plan.

- **Follow up with AE:** When the DC is accepted and the demo is done, technically the job of an SDR is done. Then it becomes an AE's responsibility. But practically that might not be true. Let's admit the fact that AEs have a lot on their plate. Attending DCs, reviewing requirement docs, setting up demo instances, doing the demo, finding workarounds, sending out proposals, negotiations, etc. Even if they set up hard-dated telecons, there is a chance that some things may fall off. So as an SDR, you should be keeping an eagle eye on those

opportunities that are passed by you and make sure their latest status is updated. Check comment on the latest update and next action, if it's not there, just ping AE personally. If something is not moving for say 2-3 weeks, an SDR should take that opportunity back and see where it went off. As a salesperson, we take a lot of follow-ups with our prospects, why not do that internally with your AE as well? We rise as a team and fall as a team. If your SAL does not close, it's ultimately the loss of the entire team.

- **Make conscious efforts:** Everything that you have just read is useless if you don't take actions actively. Most of the things that are written here are very basic, there is no rocket science. We probably knew it all. But just realizing that you are missing on those points is not enough, just realizing that there is a problem is not enough. If you know that your rate of speech is high, try to make conscious efforts to slow it down and see the results.
- **Stay motivated:** As a salesperson, sometimes we will have off days, off weeks or even off months. It's okay, there are times when things just won't work out no matter what you do. But if you are having an off month, you might wanna get to the root of it and understand where it's going off. Is there something that you are doing wrong, are you missing out on something, or some external factor that's not really in your control (like COVID). It has happened in the past that a good looking pipeline with 5-6 opportunities were wiped out within just a span of a week. It's really demotivating. That's why it's really important to have a large enough pipeline so that if something goes wrong, you have enough back up to meet your target.

- **Always be learning:** Know that there is always an area of improvement, nobody is perfect. Learning should never stop. Read more books, attend those training sessions, make your own pitch, work on your email skills, build a strong network on LinkedIn. Or at least, keep coming back to this Inside Sales doc, you'll learn something new every time.

Starting with a monthly goal we can work backwards based on a set of assumptions about conversion rates to figure out what our throughput should look like.

Note: Please remember this target is based on Inbound call based and doesn't include Outbound Base. It's important to factor in up-sell, Cross-sell and Renewal to existing accounts. Examples: New DMs get involved to buy more services, support, consulting, etc.

Execution plan

We provide you with the right set of CRM to enable you to maximize your All-bound target. Sales cadence will be defined shortly based on persona and target market

Let's get started:

Your job is to isolate the challenges your personas face on a day to day basis. But, make sure you don't get pigeon-holed here, rather, try and establish a relationship with other key contacts within the account at the top level.

It's very important to customize your messaging based on persona to better connect and progress your conversation. A front-line manager would only think tactically to solve a problem at hand, but, a

C-level executive will be a strategist and would look at the bigger picture. **E.X.** How would they improve operational efficiency this year?

Back to Basics (Rules of Engagement for better Inside Sales alignment)

There is a critical need for alignment between Sales consultants and Inside Sales function that feeds the daily pipeline. The foundation to this alignment lies in a clearly defined account based selling strategy, a proven qualification process for accounts passed to next steps, and an organized, well-documented and an efficient lead hand-off process.

Use the steps in this guide to develop a sales pipeline full of quality sales appointments with well-qualified prospective buyers that show up to each meeting during your sales cycle.

A standardized qualification of an account to SAL (Sales Accepted Lead) or Opportunity and hand-off process for AEs.

Before setting up an appointment with yourself or Sales Managers, the standardized sales process MUST be followed and adopted by every team member. At this stage, you must understand what a qualified account consists of and how it should be passed from one team to another should be crystal clear. During on-boarding and training, we'll discuss asking open-ended questions around BANT (Budget, Authority, Need, timeline). Caveat: Even if you have spoken to an "Authority" and established "Needs", you can invite in your sales manager for a deep-dive demo with a wider audience at account level for further qualification by a SM. Once a BANT is established, it'd be considered SAL/Opportunity . For that to happen, you must convince your champion at the account to invite their key stakeholders for the demo with SM.

Reaching out: Sequence Of Steps

In this 18/10 cadence, there are 10 touch points composed of phone calls, Emails and social touches steps over the course of 18 days. These steps are designed to increase the recall value from the prospects who haven't responded to your multiple people. 80% of sales reps give up on 2nd or 3rd follow ups, which results in poor qualified leads and sales performance.

Here are the sequence of steps to follow to ensure everyone of you're executing the process correctly:

1. **Day 1**
   Step: 1
   - Call (Open/New Lead within 5 mins)
   Step: 2
   - Email -1 (Use Template) Customize as per 10:80:10 rule
   Step: 3
   - Set Descriptive Follow Up task in CRM 2 days out for the 2nd follow up if No Answer

2. **Day 4**

Step: 1
- Call: 2 (The 2nd follow up to the same set of leads you touched earlier)

Step: 2
- Email: 2 (2nd follow up email to the same set of leads you touched earlier)

Step: 3
- Set Descriptive Follow Up task in CRM 2 days out for the 3rd follow up if No Answer

3. Day 8

Step: 1
- Call: 3 (The 3rd follow up to the same set of leads you touched earlier)

Step: 2
- Email: 3 (3rd follow up email to the same set of leads you touched earlier)

Step: 3
- Send LinkedIn connection request with personalized message (Don't push for a meeting)

Step: 4
- Set Descriptive Follow Up task in CRM 3 days out for the 4th follow up if No Answer

4. Day 12

Step: 1
- Email: 4 (4th follow up email to the same set of leads you touched earlier)

Step: 2 (After a few hours gap call them)
- Call: 4 (4th touch)

Step: 3
- Set Descriptive Follow Up task in CRM 5 days out for the 5th follow up if No Answer

5. Day 18

Step: 1
- Email: 5 (5th follow up email - Last for real. Break up Email)

Step: 2 (Call in the 2nd half or after a few hours gap)
- Call: 5 (Last for real)

Step: 3
- Set Descriptive Follow Up task in CRM 30 days out to check again

Sales Script (Outbound Approach)

Outbound Call Framework T (Your target persona):
- Lost in the city tone - Opening line of a prospecting Call
- Thinking out Loud - Leads after a question or two
- Asking problem based discovery questions - Layer off….
- This might make sense to…...

Target: Head/VP/Dir of Finance

You: Hey Bill, I was browsing your website and I'm kinda lost and I was hoping you could help me out here. Can I steal a sec?

<center>**OR**</center>

You: Hey, Bill. This is Sandeep over at ERPNext. Listen, I need some help. I know you and I've never spoken before but, can I take 60 seconds to tell you the reason for my call and then you decide whether it makes sense to have a conversation?

<center>**OR**</center>

You: Bill, this is Sandeep Shekhar over at ERPNext. Let me be upfront here. This is a cold call, so either you can hang up right now or allow me 60 seconds to tell you the reason for my call and then you can decide whether it might make sense to have a conversation, is that fair?

Bill: (Any response along the lines of "Sure." If the prospect ever says that you have called at a bad time, ask when would be a better time to call back.)

You: I was thinking out loud, are you the person in charge of managing/handling finances/accounting?

Prospect: Yes, That'd be me. You: Great, glad that I got better phone luck today.

<center>## 30 Seconds Commercial/Pitch: *VP/head of Finance/Accountant*</center>

*You: Bill, tell you what, I talk to (CFO/VP/head of Finance) all day long, typically in the manufacturing world. And while They tell me that they have some sort of system, however, a lot of them still **struggle** with managing complex transactions due to disconnected systems in place, **unhappy** with the lack of insight into business processes and **disappointed** by the amount of time it takes to reconcile purchasing, invoicing, inventory*

Do you think this applies to your business world or you've got it figured out?

<center>**OR**</center>

Do you run into these challenges on a day to day basis? or Am I just rambling?

Bill: Yeah, Sure. We're using SAP version 5.0 and it's outdated and we've a lot of problems in even generating simple reports. It requires doing coding to get that done and we're very disappointed with the support as well.

You: Interesting! Bill, I'd like to see your business world through your eyes. With your permission, can I go ahead and ask you a few questions to see if ERPNext could be the solution to your problems. And, If I think we can't help you out properly, will that be okay if I tell you that upfront. I want to be cognizant about your time.

You: So, Bill, what are you using to manage and track warehouse and inventory?

NOTE : *Now is a good time to get into problem-based discovery questions.*

Discovery Question 1: So, Bill, how do you ensure you've enough raw material on hands without breaking the bank to stock them?

Illusion of choices: Do you have a system that tracks stocks and inventory, Or, is it manually done?

Discovery Question 2: How does inventory/stock data flow into the accounting? (Assuming they have different systems to manage inventory and stocks)
Illusion of choices: Is it manually done by someone? How often?

Discovery Question 3: How do you ensure you've full visibility into entire business processes so that you don't have to worry about any risk and compliance?

Discovery Question 4: How're you making sure that your team is able to correctly track your Payables/Receivables so that you're not losing money/owing to vendors for too long.
NOTE: Now it's up to us to drive the conversation and keep them engaged by asking more probing questions.

Tone:
You: Bill, This **m**ight **m**akes **s**ense, you've a lot of X, you aren't able to do X, and you might potentially be missing out on Y

Value Proposition:
ERPNext is an open-source solution designed to solve mundane, repetitive tasks and automate the entire back office operations. So that you can only focus on running your business without worrying about operational breakdown as a result..

Now, ask for the meeting - Assumptive/Let me help you:
You: Bill, can we set up a meeting with one of my senior consultants that specialize in [Industry], So that they can dive a bit deeper into how ERPNext might help you overcome your current challenges we discussed. Do you have 15-20 minutes sometime later today or tomorrow?

30 Seconds Commercial/Pitch: CTO/CIO/IT Dir/Engineering (With an objection)
*You: Bill, tell you what, I talk to (CTO/CIO/head of IT) all day long, typically in the manufacturing world. They tell me that they have various systems in place, however, a lot of them still **struggle** with information silos due to disconnected systems, **worried** about the security and compliance risk due to manual entry and lost data. Also, they're **disappointed** by the lost time and lack of visibility into the process as a result.   (Note: Repeat the same process)*

Shallow objections:
Bill: 1. Send me an email. 2. Not interested 3. I was in a meeting but I picked up the phone thinking you're someone else. 4. Running into a meeting.
Note: You can understand and counter these objections by structuring your conversation shown below.

Pattern Interrupt

You: Bill, Can I level with you? I've been hearing "Send me an email" from a lot of people recently. And, I get the feeling that probably it's your polite way of saying "Go away you annoying sales rep". Did I get that right?
Note: Now, you will get one of these two reactions. If Bill is really busy or it's a real objection, Bill will back this up by saying : Oh no! I was really running into a meeting but I'm interested in hearing you out or something along those lines. 2nd Reaction: Bill might crack up a bit and say " Yeah, you got me. or, Yeah, I'm just not interested.

Empathy
You: I get it. I say the same thing when I get a cold call out of the blue. *Note: Let's assume Bill level with you and shows curiosity to learn what might offer*

Prospect Pact
Bill, I'm not sure if we might be a fit for you, but, can I get 30 seconds to tell you the reason for my call and then you can decide if it makes sense to continue the conversation from there?
Note: If Bill agrees then you're in the game and pitch your 30 sec commercial and lead the conversation followed by problem based discovery questions.

Sales Script flow for Inbound

Opening the call:
You: Am I speaking with Bill?
 Hey Bill , this is Sandeep from ERPNext. I hope I didn't catch you in the middle of things.
Bill: No, I got a few minutes. What's up
You: Does ERPNext ring a bell?
Bill: Yes, it does.
You: Great! I wanted to reach out and gauge your overall interest in exploring ERPNext and see your business world through your eyes. Do you have 15-20 mins to chat about it? This way, we can figure out quickly if We are a fit here, Fair enough?
Bill: Sure, I do have 15 mins.
You: Great! I see that you signed up for a trial account and mentioned that you're interested in exploring more about Stock, sales and purchase lifecycle management as well as open to learning more about accounting and HRMS. Is my understanding correct? Bill will say something.
You: Q1: Well, just out of curiosity, What prompted you to explore ERPNext of all the solutions out there? Did you look into other solutions as well? Can you talk about what you liked or disliked about other solutions? (Listen and don't interrupt)
Bill: if the reply is positive for ERPnext, ask another question
You: Q2: Is ERP platform part of your road map for this year? and is it approved and budgeted by organization-wide management? Continue….. engaginging by asking the rest of the BANT questions.

Note: Pull the **"problem based Discovery Document"** Michelle had prepared and ask a few questions per Bill's interest in that module. Now, use your skills to ask the rest of the ques tions and keep them engaging.

Bill: If Bill says 'yes' then go ahead with your pain-funnel questions. If NO. then continue with the below "May I make a suggestion"? statement and forward the conversation.

Comments: Then, understand the pain funnel by asking probing questions and rest remains the same process.

SCHEDULE THE APPOINTMENT WITH CLEAR AGENDA (Same flow for outbound and inbound)

Bill: No, I don't have 15 mins.
You: May I make a suggestion?
Prospect: Sure
You: Let's do this – Pick a day to invite me on a call, and we can discuss this further for 30 mins and dive deeper into the challenges. We may have something for you, we may not.
My experience tells me that we'll be able to figure out in maybe 10-15 mins whether or not we're a good fit.
Continue…..
If we're still talking after about 40 mins, we'll probably want to begin the process of working out how we do business together. Is that sounding fair?
And, if I think that we can't help you out properly, will you be okay if I tell you as much? It'll save everyone a lot of time and effort after all, right?
Comment: *This time the prospect will say "Okay". Idea is to get that Okayness.*
Continuing….. I guess it's only fair then that if at any time you don't feel that we're the kind of company you want to be working with; will you be okay telling me that too? Don't worry, you won't offend me. You'll still be on my Christmas card list ☺! Add a bit of humor!

You: Just as a recap, bill: "typically we find that the best way for the first meetings to go would be if I ask you a whole bunch of questions around the issues –
You know, to try to see the business issues through your eyes. Are you Okay with that?
Comments: *He won't say "No," I promise. Hooray! Now you've the permission from the prospect to ask.*
Continuing…. And, Bill, you're probably going to want to ask a whole bunch of questions, too.
Such as, who else we've worked with, how our process works, what the timescale will likely be; you know, all of that kind of stuff, right?

You: is there anything else you think we need to add to the agenda?
Prospect: No, we are good!
You: Great. And, just to be clear, Bill, what usually happens at the end of these first meetings is that once we know each other better, we can have a good feel for whether or not we will meet again or kill it; are you okay with that, too? And, prospects will say "Yes"

ON THE DAY OF AN APPOINTMENT with yourself

You: Thanks again for meeting/joining the call today, Bill. How are things with you today?

When we spoke the other day, we agreed to discuss the accounting, inventory and sales related challenges, right?
And we talked about how you'd be wanting to ask me lots of questions about how we do or deliver the solution, correct?
And, in order for me to be able to see your world through my eyes, I'd like to hear more about the current challenges, yes?
Comments: *Just wait for Bill's response after every question.*
We also agreed that by the end of this meeting/call we would likely realize whether or not we're a good fit, in which case either of us would say so without hurting the feelings, didn't we?
But, we also said that if we both believed that it'd make sense to continue, we could agree to take things to the next level and agree on the next steps; are you still going to be okay with that?
So, let's get started.

Comments: *Now is the time to jump to 'Problem based Discovery' and BANT qualifying questions below. Just keep in mind to be professional about asking questions. Also, it should be a two-way street to understand answers to each question and respond accordingly. Just the way we talk to our family members.*

BANT (Budget, Authority, Need, Timeline) Qualifying Questions:

AUTHORITY, NEED, TIMELINE Question

- Is an ERP platform part of your road map for this year? and is it approved and budgeted by organization-wide management?

- What prompted you to explore our solution?
- No-one buys software just to buy software. People love to buy an impact. What various leading indicators and outcomes you're hoping to achieve?

- Have you explored a solution earlier? Can you talk about what you liked and dis-like about them?

- Do you understand the perceived value proposition of the ERP? and would you mind what that would be for you?

- And, what's your understanding from the business and technical side of the project?

- And what's the priority of this project along with other projects that might have been going on?
  Note: The answer will tell us if they are seriously looking out or it's just a casual google search to fit in something at a later time (Surface Pain)

- How is it impacting your business? Eg: Cost cutting, poor operational efficiency, delayed accounting, etc.

- What if you didn't do anything and kept the process the same? It will let us know the actual business pain - and typically while answering this question, the prospect is giving reasons for the concerns.

- If you had a chance to wave a magic wand to have the most desired outcome from a solution, what would that be? or what is your wish list for an ideal solution? This is for us to know how much as a solution we can help the prospect fulfill his/her wish.

- (Personal Pain) I understand the challenges and the need, but how does picking the right solution impact you, personally? Note: If we do not get the answer and if we find it to be repetitive, we can ask - does it put you in a better space in front of your management?
                                                 OR
  Does it benefit you to showcase better work optimization? This is to reveal the personal pain around the concerns if any. Also, this is a great question to make the prospect your Champion internally and also validate SUCCESS CRITERIA.

- While picking up the right solution, what is the most important component that you would consider? It could be price, scalability, or implementation time.
  Note: This is a very important question - this can give us a lot of clarity around whether they are price sensitive or if they are looking for a functionally viable solution or if they are motivated enough to grow as a company if they are talking about scalability.

- What does the decision process look like? how technologies have been purchased in the past and how long did it take to fully deploy?
  Note: To get an idea who else along with you would be involved in the process so that you can suggest getting someone on the conversation at a later time in the sales cycle. This will also give us a fair idea around how long the sales cycle can go post evaluation and accordingly we can take measures.

- By when do you plan to have a solution in place? *Note: If the conversation implies a longer timeline, we can ask " it seems like a big problem in hand. any particular reason why you are looking at a later solution? This question will help us know the timeline and how our follow up pattern/frequency needs to be.*
- Do you think the initiatives of adopting an ERP platform can be put on hold and why?

- What could be three potential threats for not adopting a solution to your problem?

BUDGET QUESTION:

**Typically we are not comfortable asking about the money part. So, the idea is to get that fear out of the way before we proceed.

Here's how you ask a budget question in the beginning of your conversation to see if a prospect is legit or broke!

Opening Line (Pain Statement):

Bill, let me see if I've got this straight, you talked about the problems you're having with P1, P2, P3 and it sounds like you're hoping what I can do is S1, S2, and S3. Is that a fair statement?

Bill, I grew up in a family where talking about money has always been considered impolite, so, I've this problem of my own and I want to get it off my chest :) [End this with a smile :)]

So, Bill, have you set aside a budget to solve your problems, would you mind sharing with me in the round numbers?

Will that be okay if I tell you the range of investment you would fall in. It appears

There could be three answers to the question "Have you set aside a budget to solve your problems, would you mind sharing with me the round numbers?"

1. **No, we haven't set aside a budget.**
   Ans: I get it! Help me understand how you are planning to invest on this project? Have you had any similar situations in the past? How did you manage to get the fund?

2. **Yes, We've a budget for this project.**
- **Ans:** Mr. Prospect, most of the time when I work on a project like this, the total investment falls somewhere in the $20,000 to $50,000 range. Do you think the amount you will be able to invest will fall within that range?

3. **Yes, but I can't discuss this with you.**
- **Ans:** Mr. Prospect, I appreciate that you can't reveal your budget numbers. However, maybe you can help me so that we don't waste your time. When we have worked on projects like this, the customer investment ran somewhere between $20K to $50K. Which end of the range should I focus on? Or is it over before we even get started?

If the prospect says "No" then you revisit the pain funnel and clarify the issues. (refer to point:1)
<div align="center">OR</div>
Bill, assuming that we're a fit for your problem and what we're offering, the investment is going to run between $50K - $70K depending on what you'll need. Is there going to be a problem?

Budget: (Additional Questions)

- Do you have a budget set aside for this project? If so, would you mind sharing what that would be in round numbers?
- Have you given some thought to how much you will need to invest?
- When I work with other companies on a project of this size, I find that they usually have funds allocated? Has your company done that?
- Most often when I meet with a group such as yours, I find they have a budgeted amount they would like to stick to? Has your group come up with that amount?

Decision:

- Who will make the decision, their roles, direct/indirect influence, veto power, etc.? Who else is involved in making the decision - the purpose of each step?
- When will a decision be made?
- Where will the decision be made - at what level or part of the company?
- How will the decision be made?
- Why is the decision made this way?

Simple question to dig deeper into the pain (Pain funnel)

- Tell me more about that?
- Can you be more specific and give me an example?
- How long has that been a problem?
- What have you tried to do about that?
- And did that work?
- How much do you think that has cost you?
- How do you feel about that?
- Have you given up trying to deal with the problem?

Hand Over Call With AE By SDR During A Discovery Call: Script

SDR: Thanks for joining the call, Bill. We've been joined by my senior colleague, Faraz, who has colossal experience in helping businesses such as yours. Faraz, please meet Bill. Bill has been responsible for evaluating ERP solutions at {Company_Name}. Bill and I had a lengthy conversation about a few challenges around P1, P2, P3 the other day and Bill has decided and agreed to solve the problems/challenges they've been facing for the past couple of years. Is my understanding correct, Bill?

Bill: Yes, That's correct!

SDR: Faraz, I've shared the notes with you about my conversation with Bill. And, I'm sure you may have a question or two. So, take it away. Floor is yours.

AE: Thanks again for joining the call with me, Bill. Means a lot to us. I know we all are busy professionals, so I won't take too long. I've a few questions of my own to further understand if the problems you proposed are big enough for you to take any actions.

AE's question to a prospect during the handover call:

- Look, Bill. Normally in a situation like this where we have uncovered the root cause of the problems and you and I have agreed this needs to be solved and changed. The best thing normally for us together is to get some consensus and bring some people from your team to collaborate around this so that they can support this or at least they don't oppose when we bring this change. Who else do you think can miss out if we don't bring them to our next meeting/demo and when can we do that?

- If yes, are you going to invite in your technical and functional evaluator along with end-users as well? Would you like to share their names so that I can look them up to better understand things they care about. This way, we can focus on key modules specific to the problems during the demo?

- What if we solve these problems for you, what happens next? or, Let's say Bill, we really knock it out of the park and it's 10 on 10. What will happen next?

Post Demo:

On a scale of 1 to 10, how/where would you rate our solution in terms of how it aligns to your requirements?

Important: Always agree on a follow up date and send an invite to the prospect after the completion of any call/meeting.

NOTE: The Idea is to find out the compelling reasons to change or move forward.

Discovery Call:

A sales consultant must set aside a time for him with a prospect to qualify as per BANT. During the discovery call, you must talk to a strong influencer and recommender and uncover the needs part. Once they see the value, you convince prospects for a deep dive demo with a wider audience.

Confirm the best date and time for an appointment, describe the process for next steps and send the calendar invite.

After the SDR confirms the best time and date for a demo, he or she should send the calendar invite to the prospect while still on the phone and let the prospect know to expect it in the inbox. You then politely ask the prospect to accept it while you are still talking. That way nothing goes to spam or otherwise goes missing. In the meeting invite, provide a short summary of key talking points discussed.

Use automated workflows to send follow up reminders before scheduled appointments.

SDR must always follow-up with the prospect the day before the scheduled appointment. Confirming via phone is best, but you can't reach the prospect live, be sure to leave a voicemail stating that you would like to confirm the availability and follow up with an email. Be sure to templatize your reminder emails so that you won't have to reinvent the wheel all the time.

Send all previous conversation notes to the closing sales rep. Communicate what the prospect is expecting to happen during the appointment.

It's important that the sales consultant provides ample resources to the closing rep a few days before the call so that the closing rep knows where to focus their time and how best to prepare.

Join the call together as a cohesive team and show up ON TIME.
The best way to book a sales appointment that happens is to ensure that all the members on the sales side of the meeting have an equal stake in it being successful. To achieve this, both parties should join the call together and if necessary, SDR must provide a soft introduction and hand-off at the start of the meeting.

Initiate sync-up between SDR and closing rep immediately after the appointment occurs.
The closing rep should be responsible for following-up with the sales development rep after the meeting to discuss next steps and review why the opportunity was a good fit or why they were disqualified. This kind of feedback will be useful for future appointment setting opportunities.

What to do in the event of a No-Show

Sometimes, no matter what you do to prepare in advance, a prospect doesn't show up to the appointment that was scheduled. That's okay, it happens.

Here's what you would do:
1. Stay calm. You should call the prospect and re-start the process of getting time on their calendar for the meeting. Be sure to confirm if an appointment is something they are still interested in.
2. Ask for clear input as to how they would like to be reminded about the rescheduled meeting. Do email reminders work best? How much advance notice would they need? It's okay to imply that everyone's time is valuable, and we absolutely want to make sure meetings do happen.
3. Give the prospect something to be excited about. Let them know what to expect during the meeting. Everyone wants value from time. If a prospect is consistently a no-show, then go back to the basics of qualifying and understand what the underlying issue could be. Maybe they aren't ready to buy/move forward yet.

Top-of-the-funnel objection handling
Typical objections you'll hear when scheduling or rescheduling an appointment

1. "I spoke with my boss and I no longer feel like this is the best time to have a conversation about your offering. You could try back in 6 months."
This kind of objection means several things. It could be budget related, a project or initiative has been pushed indefinitely. Or, simply no longer interested in a meeting. However, you can still reiterate what you discussed about their current challenges during the first conversation and how would it impact their business if they don't do anything to solve their problems.

2. "Oh man, I have got tons of work on my plate, so, I'm going to need to reschedule. You know what, I'll get back in touch with you."

The classic, "Don't follow up until I reach out to you" blows off. This one is dangerous because you're leaving the ball (a.k.a leverage) in their court. Use the objection handling technique such as – "*I totally understand your situation, even I have to juggle several responsibilities. When we discussed your challenges around managing [Insert challenges]. you mentioned this goes on your top of priority. Can you carve out 15 mins next week to discuss this with my senior colleague? This way, we can determine if we are even a good fit or not.*" Something along those lines.

3. "I don't remember committing to a meeting with you. Take me off your list."
Sometimes, if you push too hard for the appointment that the prospect is not ready for, they will agree to a next step just to get off the phone with you and then blow off the meeting altogether.

4. Radio silent: This one is the toughest to flip. You try to remind prospects about the meeting, and you hear nothing. In this scenario, you have to prove the meeting will yield positive results. So, acknowledge the objection, connect with the value proposition and progress.

Personalising Your Emails:

We talk about personalizing emails all the time in our communications to illicite responses but without the context it means nothing and can lead to a fake rapport. So, let's look into 5 premise buckets to guide us into ways to improve response rates.

5 Premise Buckets

1. Self-Authored Content
   - Webinars
   - Articles
   - Posts

2. Engaged Content
   - Liked
   - Shared
   - Comments
3. Self Identified Traits
   - Profile Line
   - Headline
   - Companyline

4. Junk Drawer
   - Schools Attended
   - Personal Interests
   - Hobbies
   - Recommendations
   - Skills Endorsements

5. Company
   - M&A
   - Posts
   - Blog
   - Hiring
   - Website Language

How to be an insatiably creative sales rep in writing emails. Let's structure our emails:

Premise (Who are you and What do you want - Nail this first) <u>10</u>:80:10

What about the prospect or a company triggered the outreach? (The reason for my email is…..) Buyers read your emails clockwise to find out "Who you are?" and "What do you want?" They don't care about the middle part of the body of the email until you really nail the 'Who and What' part by enticing them to read that.

Body (Mapping your company's value proposition to the premise of your outreach) 10:<u>80</u>:10

This is where you hook the personalization to relevance. It's very hard to think in your brain then putting it out on paper or email. It's great that you've hooked the prospect with what they wrote, engaged with the contents, liked, commented, headlines, etc, but the love and labor to put the company's value prop and tie with what they care about has to be crafted carefully.

CTA (Request ONE time to unpack the content mapped out in the premise) 10:80:<u>10</u>

One thing that buyers don't have is enough time and you assume that if they have the time or not, they should be compelled enough to find the time you crave/compete for by laying out succinctly what they hope to gain out of the meeting you're proposing.

Push - Pull Technique (Either Way….)

It's okay if a buyer doesn't give you the time you asked for. You can part ways by sounding genuine and not the greedy salesperson who praised their article, post or contents just to prove it was a fake rapport. Also, a great way to put in the pandemic line or encourage them to continue to write those articles or posts.
Lastly, keep your emails to 4-5 lines with the first line a bit longer.

Email Templates

Template: First Follow up after the sign up trial/contact us page (Use it for first email as drip)
Sub: {Prospect_Name}, Thank you!

Thank you for signing up for the ERPNext trial account and your interest in exploring us. Usually, folks that sign up to try ERP Next, tell me one of three things:

1. "Thanks for the trial account, Kundendu; however, at this time I'm just educating myself on ERP software."
2. "While I'm educating myself on ERP for my business, I'm also open to learning more about ERP Next platform."
3. "Please call me now. I have detailed visibility into challenges related to my business and would like to take a look at what ERPNext has to offer."

Which one of these buckets do you fall into, John? Your response will allow me to better gauge your interest so that I can help level up your business-related game. Thanks again for checking us out.

Open to having a conversation, say the word!

Best,

Template: 2nd Follow up when you haven't heard from the prospect
{Contact.FirstName},

I trust that you have had an opportunity to read my previous email and look at our website, so, I figured it'd be worth checking in with you again.

{Prospect_Title} like yourself work with us because they are concerned about how much money and time they're spending on optimizing their resources, however, are still unhappy with results.

Very often they're disappointed with their current system's performance and worried about leaking top-line revenue. I could go on and on...

Does anything at all of what I've just stated above seem relevant to you? Do you think it's worth having a 5-10 minutes conversation around these challenges?
Excited to talk!

Best,
Sandeep
+1-217-616-2300

Template: 3rd follow up when you haven't heard from the prospect
{Contact.FirstName},
I had a chance to review your business and learned quite a bit about it.

We're having quite fun engaging with businesses very similar to yours on solving the challenges around automating the entire operations, boosting revenue while decreasing overhead cost.

Can we help you? I'm not sure yet. A quick 10-minute phone call should help us figure that out.

Would it be a ridiculous idea to ask how open-minded would you be to exploring the **ERPNext** world?

Looking forward to a stern, but fair reply!

Best,
Sandeep

Template: 3rd follow up when you haven't heard from the prospect
Hi {{first_name}},

I trust that you have had an opportunity to read my previous emails and look at our website, so, I figured it'd be worth checking in with you again.

We at ERPNext have learned from thousands of our loyal customers that it could be an overwhelming decision for a small & medium sized business to determine whether a cloud-based ERP system can complement the replacement of on-premise traditional systems while boasting of similar core functionality. Businesses today are getting ready for the modern ERP make-over.

Let's face it, we are all too busy until we hear about something that can really benefit us. However, we can find out answers by getting on a 10-15 minute call.

What do you think?
Excited to talk!

Template: 4th follow up when you haven't heard from the prospect
Hey {!Contact.FirstName},

Since I haven't heard from you, I've started to get the feeling that you probably already have a system/solution you're happy with, but here's why I've decided to email you again today. We've worked with hundreds of businesses just like yours. After learning what we could do for them, they chose to make the switch.

Seeing this pattern over and over made us realize that we needed to reach out to businesses that already have a solution in place, so we can show you there's something better on the market.

Do you think it's worth taking some time out to discuss the possibilities?
Excited to talk!

Template: 5th follow up (Break up email)
Sub – I'm starting to feel like a stalker

Hey {{first_name}},

I'm sure you are probably wondering by now, "Who is this {{sender.first_name}} person, and why do they want to talk to me so badly?"

Unfortunately, we haven't been able to connect yet. I totally understand; life gets busy. I hope you don't take offense to my persistence. That said, I wouldn't reach out If I didn't believe ERPNext could help your team.

My guess is you haven't replied because of the following reason:

1. You have a system in place and it's perfect for your requirements. :)
2. This is not a priority for you right now. (That's cool.)
3. You're on a sandy Hawaiian beach.:)

All you need to do is choose one of the above numbers and hit reply so I know what's going on and I'll take the appropriate action (if needed).

Best,

Template: Email response to "No Thanks"
Hi John,

No worries, I removed you from my outreach. The reason I reached out to you in the first place is because I'm working with a few companies similar to yours – small businesses in the manufacturing world who want to run and grow their business smoothly without any operational bottlenecks.

While we typically like to work with companies who are looking to take it to the moon, I'm having a lot of fun helping businesses like yours, so, if you find yourself in need of helping hand with exploring an ERP platform, don't forget about me.

Cheers to a killer rest of the year!
Best,

Template: No Response –The Surrender Email
Sub: My Apologies {Name of the client}

Hi {name},

Hopefully, you might have a few minutes to help me out with some feedback. I haven't heard from you over the last few weeks, which is perfectly OK. However, based on our previous conversations, we had built enough confidence in us to begin working out a business relationship.

I can only assume that perhaps somewhere in our communication, I dropped the ball or could have done a better job at explaining how our services could help {name of company}. Or maybe you've decided to just sit tight for now, which is not a problem at all.

I understand that there are multiple people competing for your time and resources. But I will, for now, ask for a favor. I'd love to be able to be more helpful in the future, so would you be open to sharing some feedback as to where I could have improved in my ability to have better addressed your needs? Even a few bullets would be super helpful as I'm a work in progress.

Let me know what you decide!
Best,
Sandeep

Template: No Response – Use this email when a prospect has pulled a disappearing act on you
Sub: John, Should I stay or go?

Hi John,

You expressed interest in exploring ERP Next to potentially solve your business operational challenges; however, I haven't heard back from you. I assume that somewhere along the way I dropped the ball or that your interest has diminished, so this will be my last email to you.

If you'd like to pick things up again, no worries — please let me know and I'll have you run your business without any hiccups in no time.

Thank you,

Template: "Send me some information in the email" (How to diffuse this objection)
Sub: Re: A time to talk!

Hi John,

Sure thing. I could send you tons of information, case studies, references, but in my experience, this stuff usually ends up in the recycle bin because it requires too much work to get the answers you're looking for. Just so I don't do you a disservice and waste your time, would it make sense to have a brief 15 minute conversation for us to quickly get an idea if there's even a fit? If you think we can potentially help, I'm happy to send whatever info you need, including my recipe to the best Briyani you've ever had.

Is that something you'd be open to?

Fingers crossed,
Sandeep

Template: Re-engaging with the past prospects
Sub: {Prospect_Name}, Have things changed since last we connected?

Hi, {First_Name},

You must miss me terribly since it's been 6 months since we last spoke. That's perfectly normal.

So why the heck am I writing to you?

The last time we spoke, you mentioned that you couldn't move forward with ERPNext because We were out of your budget OR the project went on hold OR which is completely understandable given your situation. Not sure if implementing an ERP solution is still a priority, but if it is, would it make sense to pick up our conversation where we left off?

Ok, I hope that wasn't too painful. Thanks for reading. Fingers crossed.

Keeping your business always in my mind!

Best,
Sandeep

Template: Re-engaging with the past prospects (Follow up -2)
Sub: The Audacity of this email

Hi {{first_name}},

Last year, we were exploring an opportunity of us working together but somehow things didn't move forward.

Would it be a terrible idea to re-engage? Looking forward to a stern but a fair reply!

Frequently Asked Questions by Prospects

Questions on Modules: https://frappe.io/wiki/erpnext-sales-faqs

Questions related to Pricing: https://frappe.io/wiki/pricing-faqs

Enterprise selling - Land and Expand

1> Understand the scope of the opportunity first
Ex: Are they looking to start with 20 users instead of 100 users?
Buyers job is to mitigate the risk
2> Ask tough questions but politely : Is there any scope of future expansion?

3> Why and which segment of these 20 users are you going to start with?
4> Understand that buyers buy because of pain alleviation over pleasure. What's the win for them?
5> Have a reputation of telling the truth, saving the client money, & "DOWNSELLING" when appropriate
6>