

SOP: Sales & assigned VA Outreach on Maltix Connect Use this as a replicable template within Gemini



Purpose

A quick-reference Standard Operating Procedure for sales professionals and their assigned VA to drive warm introductions, book 15-minute calls, and earn sales commissions using Maltix Connect.

Key Support & Links

- **Support:** Elaine – Master Facilitator Maltix Connect ([Connect Here](#))
- **Sales Hub:** [Master Sales ALL Shops](#)
- **Weekly Review & Training Call:** Every Monday, 2:00 pm – 3:00 pm

Division of Roles: Sales Rep & Assigned VA

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Assigned VA Daily Tasks

- Open Maltix Connect Chrome Extension with **Universe** selected.
- Run 'Match Me' queries focused on targeted decision-makers.
- Shortlist leads scoring **7/10 or higher**.
- Identify mutual MMT connectors for each shortlisted lead.
- Queue or send **5 warm intro requests** daily, rotating connectors evenly.
- Log all identified leads and active threads.

Sales Rep Daily Tasks

- Promptly acknowledge intros once confirmed.
- Send the warm outreach note and personal booking link.
- Host 15-minute alignment calls.
- Share the digital eCard during or immediately following the call.

- Close deals and update the weekly commission tracker.

Step-by-Step Daily Outreach Workflow

Step 1: Lead Identification (VA)

- Run the daily 'Match Me' search prompt:

"Find me senior directors, owners, and operators within [Target Industry]."

- Focus strictly on prospects rated **7/10+**.
- Note down prospects in batches of 5 (results do not auto-save).

Step 2: Warm Introduction Protocol (VA / Sales Rep)

- **Strict Rule:** Never send cold connection requests on LinkedIn.
- Review mutual connections via Maltix Connect to select an MMT introducer.
- Rotate between connectors to avoid over-asking the same contacts.
- Send this introduction request:

"Hi [Person], I noticed you are connected with [Person] at [Company Name]. We help growing businesses eliminate operational admin so their frontline teams have instant answers and enjoy speaking with customers again. Would you mind making a gentle introduction over LinkedIn or email? No pressure at all, but I'd be genuinely grateful. Best, [Person]"

Step 3: Prospect Engagement & Call Invitation (Sales Rep)

- Acknowledge the connector warmly and welcome the prospect.
- Invite the prospect to connect directly on LinkedIn if not already connected.
- Send the custom story message:

"Hi  Person, thanks to  Person for connecting us!

There is a familiar sound in every growing business: the phone rings, someone scrambles through a spreadsheet, an email gets half-written, and a customer is left waiting on hold. It is the quiet friction that drains a team's day.

We help business leaders step away from that daily operational clutter. Everything their team needs is right at their fingertips, meaning staff have exact answers in three seconds flat, callers feel looked after instantly, and phone conversations end with genuine smiles.

I would welcome a brief 15-minute chat to share ideas on how this could work for your team. Feel free to reply with your booking link, or choose a convenient time directly on my schedule here: [\[Insert Booking Link\]](#)."

Step 4: Call & Immediate Follow-Up (Sales Rep)

- Run the 15-minute introductory call focusing on where their team loses time and customer connection.
- Dispatch your interactive digital eCard directly to their mobile before hanging up.
- Log progress in the weekly pipeline.

Weekly Rhythm & Targets

- **Daily Target:** 5 warm intro requests sent per working day.

- **Weekly Cut-Off:** Submit commission and activity reporting every Friday by 5:00 pm.
- **Weekly Support Call:** Attend the Monday team session (2:00 pm – 3:00 pm) with the Master Facilitator Maltix Connect to refine targeting and review leaderboard rankings.