

# Prospecting and Lead Generation

Sample



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# TABLE OF CONTENTS

---

**Preface** .....4

*What is Courseware?*..... 4

*How Do I Customize My Course?*..... 4

*Materials Required* ..... 5

*Maximizing Your Training Power*..... 6

**Icebreakers**.....7

*Icebreaker: Friends Indeed*..... 8

**Training Manual Sample**.....9

*Sample Module: Prospecting* ..... 10

*Make It a Priority*..... 11

*Identify Your Ideal Prospect*..... 12

*Choose Prospecting Methods* ..... 13

*Make It a Habit*..... 14

**Instructor Guide Sample**.....18

*Sample Module: Prospecting* ..... 19

*Make It a Priority*..... 20

*Identify Your Ideal Prospect*..... 21

*Choose Prospecting Methods* ..... 22

*Make It a Habit*..... 23

*Case Study*..... 24

**Activities** .....28

*Sample Worksheet: Ideal*..... 29

**Quick Reference Sheets**.....30

**Certificate of Completion** .....32

**PowerPoint Sample**.....34

<b>Full Course Table of Contents .....</b>	<b>39</b>
--	-----------

# Preface

## What is Courseware?



Welcome to Corporate Training Materials, a completely new training experience!

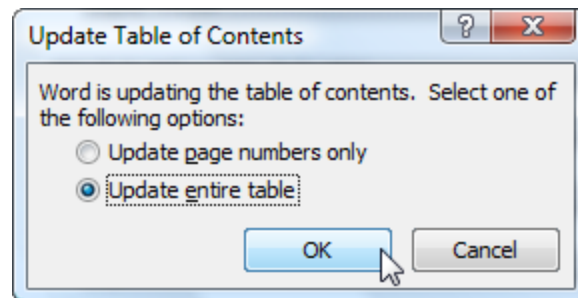
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

## How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

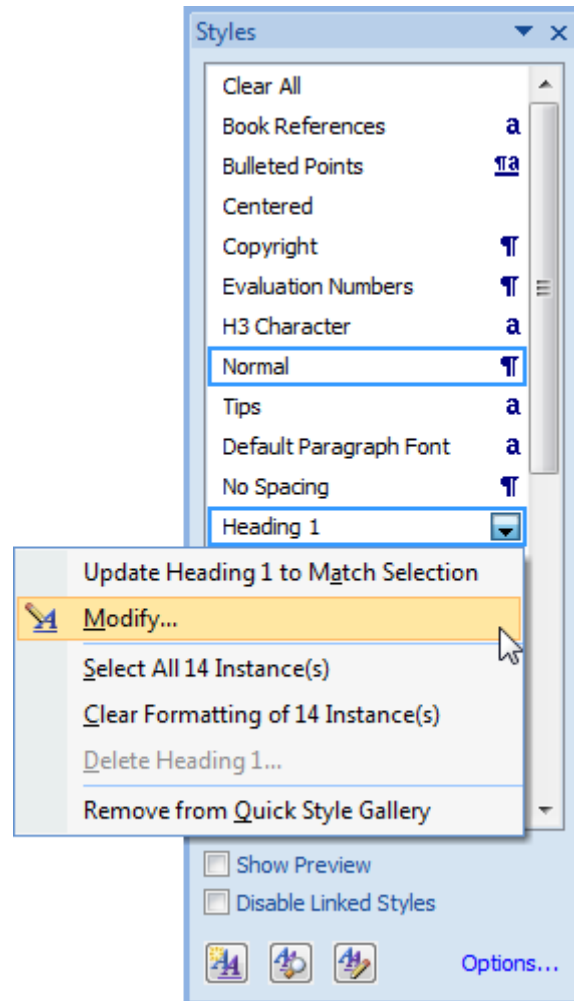


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

## Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

## Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
  - Use examples, case studies, and stories that are relevant to the group.
  - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
  - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest [Experiential Learning](#) by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

## **Icebreakers**

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

## **Icebreaker: Friends Indeed**

### **Purpose**

Have the participants moving around and help to make introductions to each other.

### **Materials Required**

- Name card for each person
- Markers

### **Preparation**

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

### **Activity**

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.



## **Training Manual Sample**

On the following pages is a sample module from our Training Manual. Each of our courses contains twelve modules with three to five lessons per module. It is in the same format and contains the same material as the Instructor Guide, which is then shown after the Training Manual sample, but does not contain the Lesson Plans box which assists the trainer during facilitation.

The Training Manual can be easily updated, edited, or customized to add your business name and company logo or that of your clients. It provides each participant with a copy of the material where they can follow along with the instructor.

*Sales are contingent on the attitude of the salesman, not the attitude of the prospect.*

***William Clement Stone***

### **Sample Module: Prospecting**



Prospecting is essential to any sales endeavor, but is often overlooked or poorly implemented. In order for prospecting to be successful, it is essential that it become both a priority and a habit. Additionally, it is essential that you understand your prospect and choose your methods of communication appropriately. Implementing these steps will help to improve prospecting results.

## Make It a Priority



Although everyone knows that the prospecting is important to the success of any company that relies on sales, it rarely becomes a priority. It is often put off in favor of tasks that provide instant gratification. Prospecting must become a priority. This requires:

- **Scheduling:** Choose a time for prospecting. Many experts advise people to schedule prospecting early in the day, but you need to choose the time that is effective for you and your prospects
- **Preparation:** Prepare what you will say ahead of time, but be flexible. Do not simply read a script.
- **Professionalism:** Remain professional throughout the process. Do not allow a negative attitude towards prospecting affect your communication.

## Identify Your Ideal Prospect



Prospecting is time consuming, which is why it is necessary to identify ideal prospects before beginning the process. Your ideal prospect is your ideal customer. Your company is able to fulfill the needs and wants of your ideal customer. Conduct research to determine who benefits from your product. The information that you must find beyond how your product meets client needs includes the following:

- Values and priorities
- Budgets
- Age
- Gender
- Buying habits
- Profession
- Interests

Once you have identified the ideal customer, you will be able to focus time on prospects who are likely to become your customers.

## Choose Prospecting Methods



There are numerous prospecting methods available, and we will cover them in greater depth in a later module. While you will probably choose multiple methods of prospecting, you must focus your energy on methods that your prospects will respond to when they are exposed to them. For example, younger prospects are less likely to respond to cold calling and more likely to respond to social networking and webinars. Prospecting methods that are commonly used include:

- Cold calling
- Referrals
- Content marketing
- Email marketing
- Networking
- Seminars
- Social networking
- Webinars
- Advertising

## Make It a Habit



It is not enough for prospecting to become a priority; it needs to become a habit. There is a common misconception that habits are easily made within 21 days. Recent studies, however, show that it takes roughly 66 to 200 days. When you first decide to make a new habit, the first few days are easy. After the honeymoon phase ends, it is easy to become disillusioned and fall back into old habits. When this happens, it is important to focus on the positive outcomes and follow your schedule of prospecting activities. After struggling through this phase, prospecting will become second nature. In order to truly make prospecting a habit, you need to ensure that you are working at it daily.

## Case Study



Henry and Jim are both experienced at sales. Jim spends an hour each day prospecting. Henry spends half that time, but he continually makes higher sales than Jim does. Jim is frustrated that so much of his time seems to be wasted. He decides to discuss Henry's strategy with him. Henry explains that he carefully screens people to find prospects that are most likely to become customers. By focusing on ideal prospects, Henry is able to close more sales. Jim realizes that he needs to focus on finding the best prospects rather than spending time contacting people who are unlikely customers.

## Module Two: Review Questions

1. What needs to be avoided in prospecting?
  - a) Positivity
  - b) Negativity
  - c) Written communication
  - d) Oral communication
  
2. What is NOT necessary for making prospecting a priority?
  - a) Schedule
  - b) Professionalism
  - c) Preparation
  - d) Values
  
3. What is necessary to find the ideal prospect?
  - a) Research
  - b) Objectivity
  - c) Promotion
  - d) All of the above
  
4. When should the ideal prospect be found?
  - a) During prospecting
  - b) After prospecting
  - c) Before prospecting
  - d) It does not matter
  
5. What will determine which type of prospecting methods should be the focus?
  - a) Interest
  - b) The prospect
  - c) Priority
  - d) CEO
  
6. What is less likely to be effective on younger prospect?
  - a) Seminars
  - b) Webinars
  - c) Social media
  - d) Cold calling



7. When is it easier to attempt to make prospecting a habit?
  - a) At the beginning
  - b) Never
  - c) At 21 days
  - d) After a week
  
8. How often should prospecting be done to ensure that a habit forms?
  - a) Frequently
  - b) Weekly
  - c) Daily
  - d) It does not matter
  
9. How long did Jim spend prospecting every day?
  - a) 1 hour
  - b) 30 minutes
  - c) 2 hours
  - d) 45 minutes
  
10. Why was Jim frustrated?
  - a) Henry spent less time than he did prospecting
  - b) Jim Spent more time prospecting
  - c) He had fewer sales than Henry
  - d) All of the above

## **Instructor Guide Sample**

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box. Each Instructor Guide and Training Manual mirrors each other in terms of the content. They differ in that the Instructor Guide is customized towards the trainer, and Training Manual is customized for the participant.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

*Sales are contingent on the attitude of the salesman, not the attitude of the prospect.*

***William Clement Stone***

### **Sample Module: Prospecting**



Prospecting is essential to any sales endeavor, but is often overlooked or poorly implemented. In order for prospecting to be successful, it is essential that it become both a priority and a habit. Additionally, it is essential that you understand your prospect and choose your methods of communication appropriately. Implementing these steps will help to improve prospecting results.

## Make It a Priority

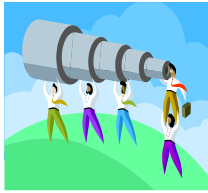


Although everyone knows that the prospecting is important to the success of any company that relies on sales, it rarely becomes a priority. It is often put off in favor of tasks that provide instant gratification. Prospecting must become a priority. This requires:

- **Scheduling:** Choose a time for prospecting. Many experts advise people to schedule prospecting early in the day, but you need to choose the time that is effective for you and your prospects
- **Preparation:** Prepare what you will say ahead of time, but be flexible. Do not simply read a script.
- **Professionalism:** Remain professional throughout the process. Do not allow a negative attitude towards prospecting affect your communication.

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce how to make prospecting a priority.
<b>Topic Summary</b>	<b>Make It a Priority</b> Discuss the importance of prospecting.
<b>Materials Required</b>	<b>Flipchart/board and marker</b>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	As a group, discuss when you choose to work on prospecting. Make a list on the flipchart/board of times that people have found to be effective. Additionally, share preparation techniques and list these ideas on the flipchart/board.
<b>Stories to Share</b>	Share any personal or relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What is required in order to make the prospecting a priority?

## Identify Your Ideal Prospect



Prospecting is time consuming, which is why it is necessary to identify ideal prospects before beginning the process. Your ideal prospect is your ideal customer. Your company is able to fulfill the needs and wants of your ideal customer. Conduct research to determine who benefits from your product. The information that you must find beyond how your product meets client needs includes the following:

- Values and priorities
- Budgets
- Age
- Gender
- Buying habits
- Profession
- Interests

Once you have identified the ideal customer, you will be able to focus time on prospects who are likely to become your customers.

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce ideal prospects.
<b>Topic Summary</b>	<b>Identify Your Ideal Prospect</b> Explore creative problem solving.
<b>Materials Required</b>	<b>01: Ideal</b>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Complete the worksheet individually. Share your answers with the rest of the class.
<b>Stories to Share</b>	Share any personal relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	Who is the ideal prospect?

## Choose Prospecting Methods



There are numerous prospecting methods available, and we will cover them in greater depth in a later module. While you will probably choose multiple methods of prospecting, you must focus your energy on methods that your prospects will respond to when they are exposed to them. For example, younger prospects are less likely to respond to cold calling and more likely to respond to social networking and webinars. Prospecting methods that are commonly used include:

- Cold calling
- Referrals
- Content marketing
- Email marketing
- Networking
- Seminars
- Social networking
- Webinars
- Advertising

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce prospecting methods.
<b>Topic Summary</b>	<b>Choose Prospecting Methods</b> Consider the different prospecting methods.
<b>Materials Required</b>	<b>Flipchart/board and marker</b>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	As a group, discuss your experiences using the different prospecting methods. List each method on the board along with the pros and cons of each.
<b>Stories to Share</b>	Share any personal, relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	How many prospecting methods are used at a time?

## Make It a Habit



It is not enough for prospecting to become a priority; it needs to become a habit. There is a common misconception that habits are easily made within 21 days. Recent studies, however, show that it takes roughly 66 to 200 days. When you first decide to make a new habit, the first few days are easy. After the honeymoon phase ends, it is easy to become disillusioned and fall back into old habits. When this happens, it is important to focus on the positive outcomes and follow your schedule of prospecting activities. After struggling through this phase, prospecting will become second nature. In order to truly make prospecting a habit, you need to ensure that you are working at it daily.

<b>Estimated Time</b>	<b>7 minutes</b>
<b>Topic Objective</b>	Consider habits.
<b>Topic Summary</b>	<b>Make It a Habit</b> Discuss habits.
<b>Materials Required</b>	<b>02: Habit</b>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Complete the worksheet individually. Share your answers with the rest of the class.
<b>Stories to Share</b>	Share any personal, relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What should prospecting become?

## Case Study



Henry and Jim are both experienced at sales. Jim spends an hour each day prospecting. Henry spends half that time, but he continually makes higher sales than Jim does. Jim is frustrated that so much of his time seems to be wasted. He decides to discuss Henry's strategy with him. Henry explains that he carefully screens people to find prospects that are most likely to become customers. By focusing on ideal prospects, Henry is able to close more sales. Jim realizes that he needs to focus on finding the best prospects rather than spending time contacting people who are unlikely customers.

<b>Estimated Time</b>	<b>5 minutes</b>
<b>Topic Objective</b>	Outline the Prospecting case study.
<b>Topic Summary</b>	<b>Case study</b> Discuss the importance of finding the ideal prospect.
<b>Materials Required</b>	None
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Discuss the outcome of the case study. How is Henry able to spend less time prospecting and make more sales?
<b>Stories to Share</b>	Share any personal, relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	Who are Henry's prospects?



## Module Two: Review Questions

1. Which of the following would NOT provide a referral?

- a) Peer
- b) Social media
- c) Family
- d) Friend

Social media is a tool. The other answer choices are people who provide referrals.

2. Where are you least likely to find potential connections?

- a) Referrals
- b) Groups
- c) Events
- d) Home

Staying at home is not likely to produce connections. The other answers will.

3. Where are you likely to *meet* strategic alliance partners?

- a) Networking group
- b) Peers
- c) At work
- d) All of the above

There are strategic alliance partners networking groups. Peers may become partners, but they are already known.

4. What should be done before discussing a strategic alliance partnership?

- a) Nothing
- b) Meet with a lawyer
- c) Determine characteristics that are necessary for a partner
- d) Create a contract that you find to be beneficial

Strategic alliance partnerships require working closely together. A list of characteristics should be made before meeting with potential partners.

5. What will develop with leads?

- a) Interest
- b) Relationships
- c) Networks
- d) Creativity

As leads develop, so do relationships. The two are intertwined.

6. What makes people more likely to do business with people?

- a) Money
- b) Creativity
- c) It does not matter
- d) Trust

People are more likely to do business with people they trust. This is how networking becomes influential.

7. What will result in more contacts?

- a) Developing a reputation
- b) Creating an event
- c) Partnerships
- d) All of the above

Developing a reputation will draw people to you. It will result in more contacts.

8. What will network shares improve?

- a) Sales
- b) Creative ideas
- c) Position as an expert
- d) All of the above

Networks will share information. These shares increase exposure and improve a position as an expert.

9. What does Jenny rely on to generate connections?

- a) Referrals
- b) Meetings
- c) Nothing
- d) None of the above

Jenny relies on referrals to generate connections. This helps her find useful connections.

10. How long did Helen attempt to network?

- a) 6 months
- b) 1 year
- c) 1 month
- d) 3 months

Helen and Jenny both tried to improve their networks. They did this for three months.

## **Activities**

During the facilitation of a lesson Worksheet or Handout may be utilized to help present the material. If a lesson calls for a Worksheet or Handout it will be listed in the Lesson Plan box under Materials Required. The trainer can then utilize the Activities folder for the corresponding material and then provide it to the participants. They are all on separate Word documents, and are easily edited and customized.

Below you will see the Worksheets or Handouts that are utilized during the training of the above lesson. They are located in the Activities folder and can be easily printed and edited for the participants.



## **Quick Reference Sheets**

Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

# Prospecting and Lead Generation

## Choose Prospecting Methods

There are numerous prospecting methods available, and we will cover them in greater depth in a later module. While you will probably choose multiple methods of prospecting, you must focus your energy on methods that your prospects will respond to when they are exposed to them. For example, younger prospects are less likely to respond to cold calling and more likely to respond to social networking and webinars.

Prospecting methods that are commonly used include:

- Cold calling
- Referrals
- Content marketing
- Email marketing
- Networking
- Seminars
- Social networking
- Webinars

Advertising

## Failure to Provide Value

We have already stressed the importance of providing value to prospects. Unfortunately, prospecting and lead generation is often relegated to the sale's pitch. People do not want to feel like they are being forced to listen to an individual who is only interested in their money. Failure to provide value will almost always result in potential customers tuning out your message. Remember to always provide value when you are prospecting and generating leads.

## Content Creation

Never underestimate the importance of creating impressive content. In order for content to be effective, however, must be professional and informative. There are many different avenues of content creation, and you may develop it yourself or hire an expert.

Types of Content You Can Create:

- Newsletters
- Case studies
- Blogs/ Vlogs (video blogs)
- Podcasts
- Webinars
- Social media
- Interviews
- Books

Once you have created content, you need to do everything that you can to share it. Apply the skills in marketing methods to help spread your knowledge.

## **Certificate of Completion**

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

**[Name]**

*Has mastered the course*

*Prospecting and Lead Generation*

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_

## **PowerPoint Sample**

Below you will find the PowerPoint sample. The slides are based on and created from the Training Manual. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

## Module Two: Prospecting

Prospecting is essential to any sales endeavor, so it is essential that it becomes both a priority and a habit. Additionally, it is essential that you understand your prospect and choose your methods of communication appropriately. Implementing these steps will help to improve prospecting results.

*Sales are contingent on the attitude of the salesman, not the attitude of the prospect.*

**William  
Clement Stone**



## Make It a Priority

Scheduling

Preparation

Professionalism

## Identify Your Ideal Prospect

Values and priorities

Buying habits

Interests

## Choose Prospecting Method

Referrals

Email marketing

Advertising

## Make It a Habit

66 to 200 days to make  
a new habit stick

Focus on positive  
outcomes

Work it daily

## Case Study

Henry and Jim are both experienced at  
sales

Both Henry and Jim spend time each day prospecting

Henry carefully screens people to find prospects that are most likely to become customers, hence makes more sales than Jim

Jim realizes that he needs to focus on finding the best prospects

## **Module Two: Review Questions**

1. What needs to be avoided in prospecting?
  - a) Positivity
  - b) Negativity
  - c) Written communication
  - d) Oral communication
  
2. What is NOT necessary for making prospecting a priority?
  - a) Schedule
  - b) Professionalism
  - c) Preparation
  - d) Values

## **Module Two: Review Questions**

3. What is necessary to find the ideal prospect?
  - a) Research
  - b) Objectivity
  - c) Promotion
  - d) All of the above
  
4. When should the ideal prospect be found?
  - a) During prospecting
  - b) After prospecting
  - c) Before prospecting
  - d) It does not matter

# Full Course Table of Contents

- Preface .....7**
  - What is Courseware?..... 7*
  - How Do I Customize My Course?..... 7*
  - Materials Required ..... 9*
  - Maximizing Your Training Power..... 9*
  
- Module One: Getting Started .....11**
  - Housekeeping Items..... 11*
  - The Parking Lot..... 12*
  - Workshop Objectives ..... 12*
  
- Module Two: Prospecting.....13**
  - Make It a Priority..... 13*
  - Identify Your Ideal Prospect..... 14*
  - Choose Prospecting Methods ..... 15*
  - Make It a Habit..... 16*
  - Case Study..... 17*
  - Module Two: Review Questions..... 18*
  
- Module Three: Traditional Marketing Methods .....21**
  - Cold Calling ..... 21*
  - Direct Mail ..... 22*
  - Trade Shows..... 23*
  - Networking ..... 24*
  - Case Study..... 25*
  - Module Three: Review Questions ..... 26*
  
- Module Four: New Marketing Methods.....29**
  - Social Networking..... 29*

<i>Search Engine Marketing</i> .....	30
<i>Email Marketing</i> .....	31
<i>Display Advertising</i> .....	32
<i>Case Study</i> .....	33
<i>Module Four: Review Questions</i> .....	34
<b>Module Five: Generating New Leads</b> .....	<b>37</b>
<i>Become a Brand</i> .....	37
<i>Webinars</i> .....	38
<i>Blogs</i> .....	39
<i>Engaging Video</i> .....	40
<i>Case Study</i> .....	41
<i>Module Five: Review Questions</i> .....	42
<b>Module Six: Avoid Common Lead Generation Mistakes</b> .....	<b>45</b>
<i>Limiting Channels</i> .....	45
<i>Failure to Provide Value</i> .....	46
<i>Failure to Connect</i> .....	47
<i>Failure to Try</i> .....	47
<i>Case Study</i> .....	48
<i>Module Six: Review Questions</i> .....	50
<b>Module Seven: Educate Prospects</b> .....	<b>53</b>
<i>Content Creation</i> .....	53
<i>Stand Out from the Competition</i> .....	54
<i>Fill Customer Needs</i> .....	55
<i>Always Deliver on Promises</i> .....	56
<i>Case Study</i> .....	56
<i>Module Seven: Review Questions</i> .....	58



<b>Module Eight: The Pipeline.....</b>	<b>61</b>
<i>Contact.....</i>	<i>61</i>
<i>Meet.....</i>	<i>62</i>
<i>Propose.....</i>	<i>63</i>
<i>Close.....</i>	<i>64</i>
<i>Case Study.....</i>	<i>64</i>
<i>Module Eight: Review Questions.....</i>	<i>66</i>
<b>Module Nine: Follow up Communication.....</b>	<b>69</b>
<i>Know Your Leads.....</i>	<i>69</i>
<i>Move Quickly.....</i>	<i>70</i>
<i>Know How to Respond.....</i>	<i>71</i>
<i>Set Future Meetings.....</i>	<i>72</i>
<i>Case Study.....</i>	<i>73</i>
<i>Module Nine: Review Questions.....</i>	<i>74</i>
<b>Module Ten: Track Activity.....</b>	<b>77</b>
<i>Use the Appropriate Tools.....</i>	<i>77</i>
<i>Assess Your Advertising Sources.....</i>	<i>78</i>
<i>Record Information about Leads.....</i>	<i>79</i>
<i>Assess ROI.....</i>	<i>80</i>
<i>Case Study.....</i>	<i>81</i>
<i>Module Ten: Review Questions.....</i>	<i>82</i>
<b>Module Eleven: Create Customers.....</b>	<b>85</b>
<i>Develop Relationships.....</i>	<i>85</i>
<i>Show Genuine Interest.....</i>	<i>86</i>
<i>Be Professional.....</i>	<i>87</i>
<i>Show Reliability and Integrity.....</i>	<i>88</i>

<i>Case Study</i> .....	89
<i>Module Eleven: Review Questions</i> .....	90
<b>Module Twelve: Wrapping Up</b> .....	92
<i>Words from the Wise</i> .....	92
<i>Review of Parking Lot</i> .....	92
<i>Lessons Learned</i> .....	93
<i>Completion of Action Plans and Evaluations</i> .....	93