MODERN STAFFING SALES SYSTEM

A STEP-BY-STEP GUIDE TO WINNING MORE CLIENTS

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PROVIDED BY

SCALE FUNDING

A DIVISION OF SCALE BANK

AGENDA

ABOUT ME

Staffing leader with 18+ years in the industry, scaling a bootstrapped startup into a national agency. Training and consulting other leaders to use systems to do the same.

STAFFING DASHBOARD

STAFFING MONTHLY

ES
EMPLOYMENT SOLUTIONS
THE SOLUTION TO YOUR EMPLOYMENT NEEDS

STAFFING SALES SUMMIT

THE PREREQUISITES

5 KEY REQUIREMENTS

Clear ICP

You need to clearly define your Ideal Client Profiles, including their demographics, focusing on the pain points and desired outcomes.

Defined UVP

You need to clearly define your Unique Value Proposition. It has to be Unique to you and Valuable to your Client.

ICP connected to UVP

Connect the Value your service offers to the Pain Points and Desired Outcomes for your ICP. This is the foundation of your marketing, prospecting, and sales processes.

“Good” Defined

Clearly outline what “good” business is, and what it is not. Then build your entire marketing, prospecting, sales, and recruiting system to serve this business.

Great Service

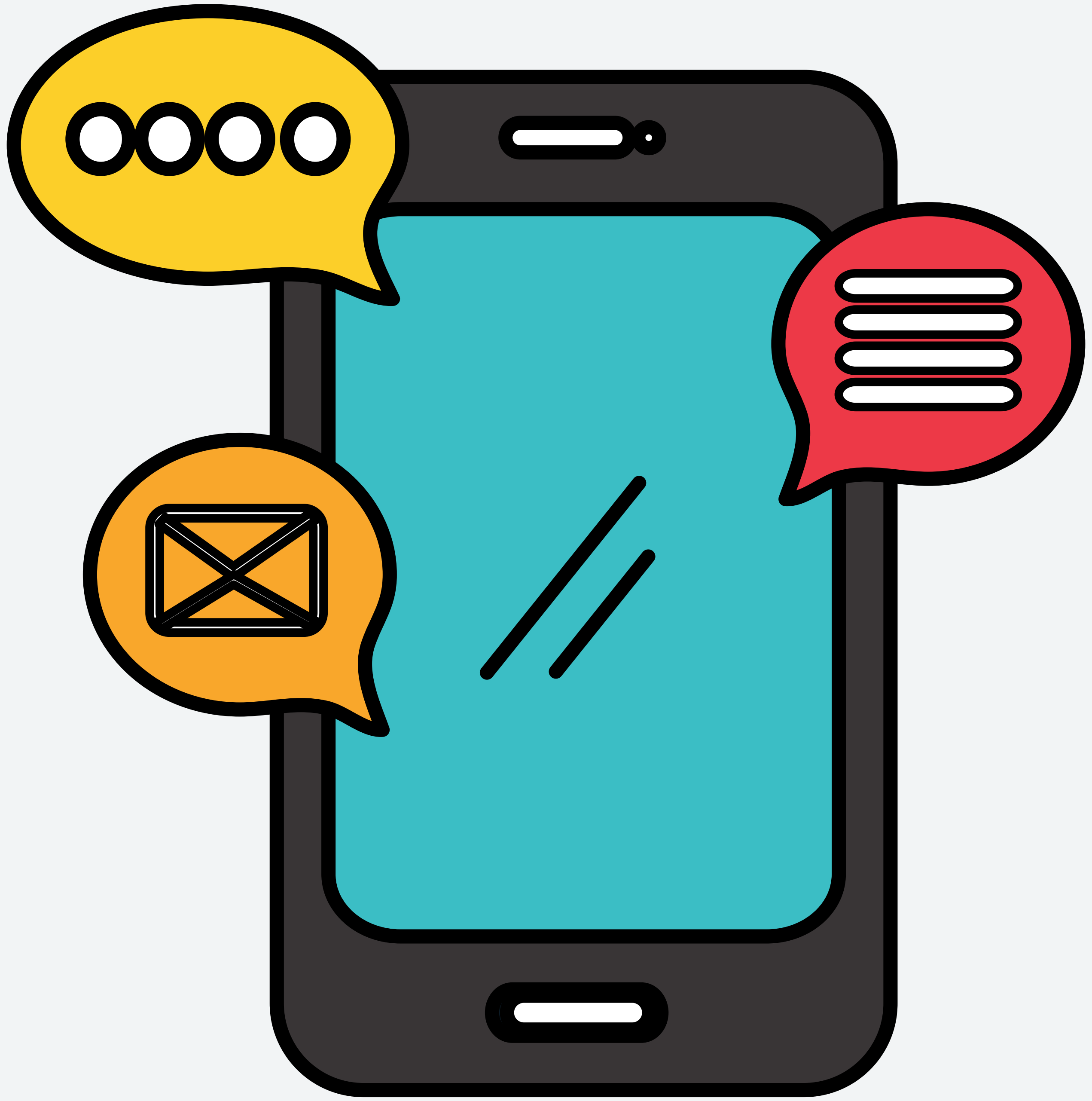
Be really good at what you do and get verifiable proof from your candidates and clients through testimonials, ratings/reviews, case studies, etc.

WHO IS A DECISION MAKER?

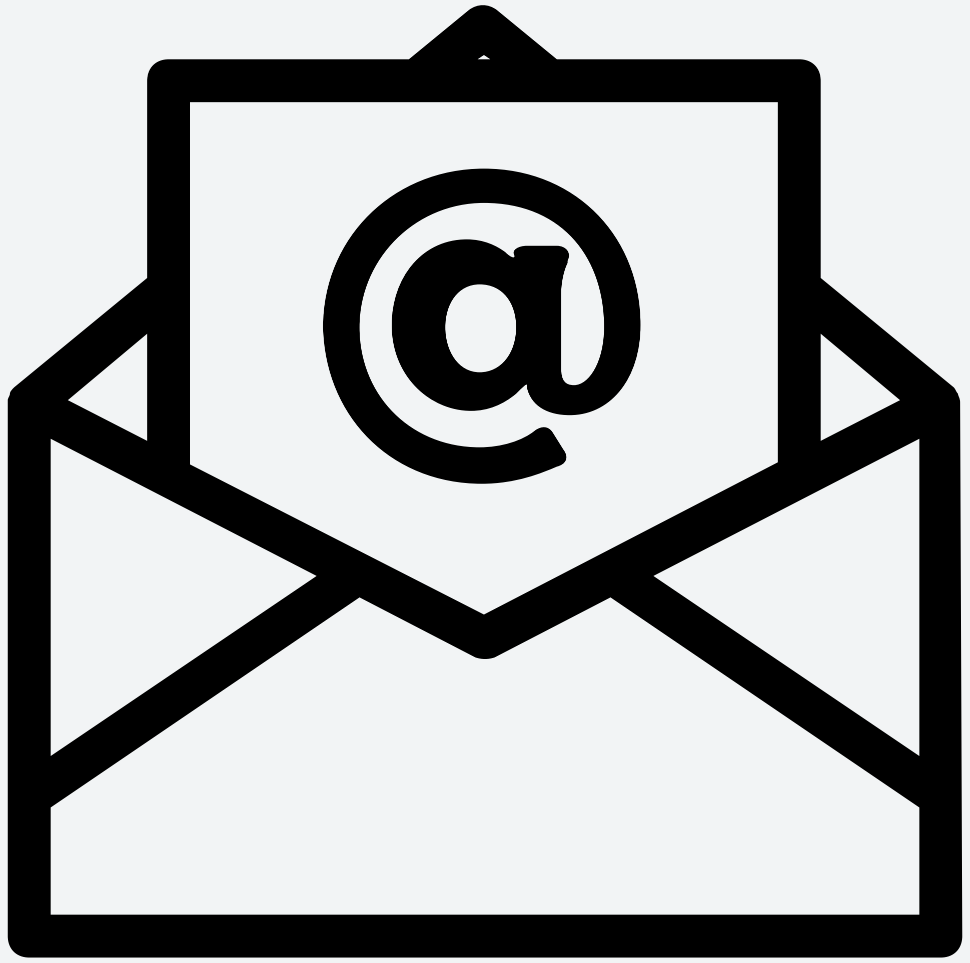
WHY THE TRADITIONAL METHOD DOESN’T WORK

THE OLD WAY

THE NEW WAY



THE OLD WAY



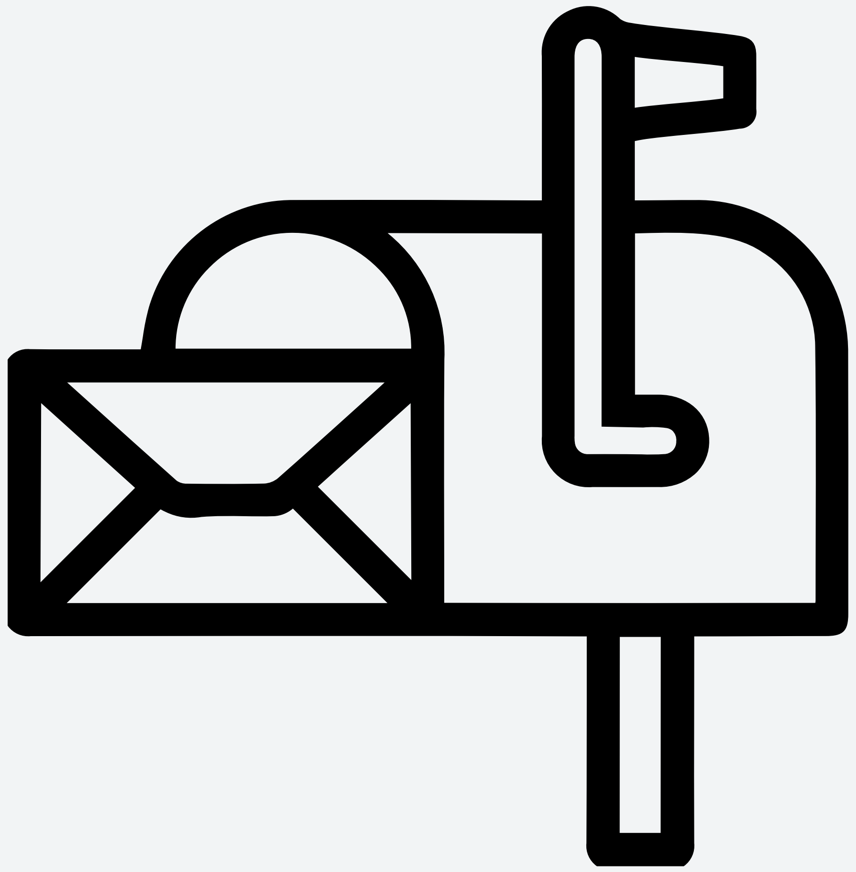
THE NEW WAY

asana

monday

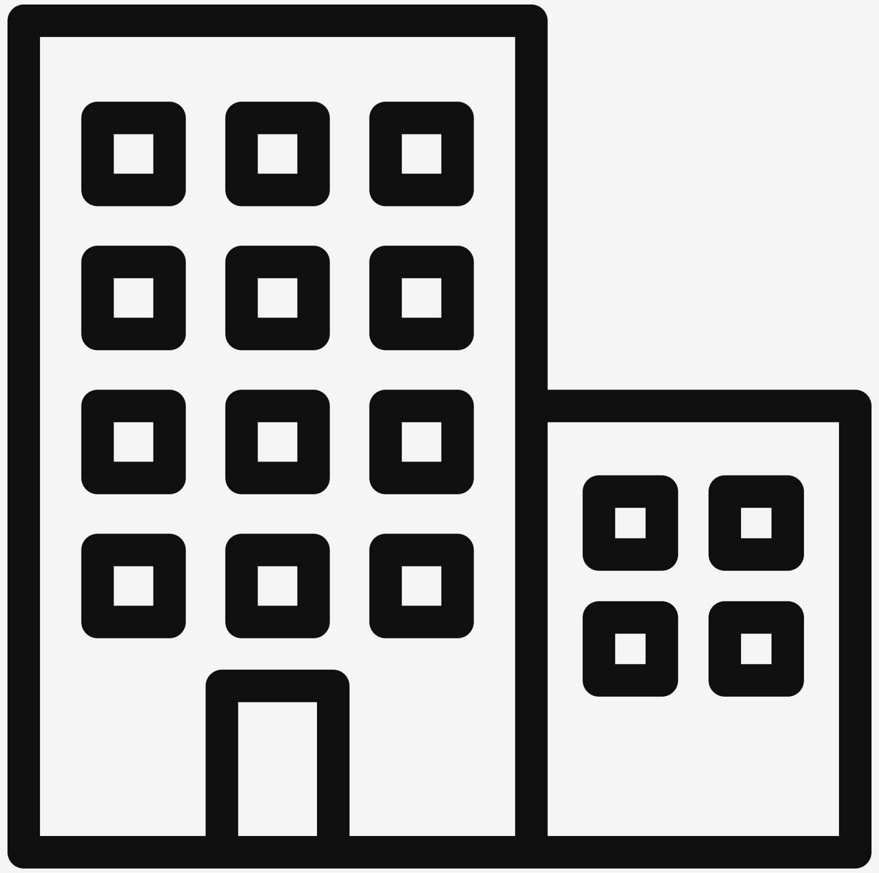
Trello

THE OLD OLD WAY



THE OLD OLD WAY

THE OLD WAY



THE NEW WAY

IT'S HARDER TO CONNECT WITH YOUR TARGET

THE OLD WAY

“IT’S A NUMBERS GAME”

THE NEW WAY

"IT'S AN AWARENESS GAME"

MODERN STAFFING SALES SYSTEM

3 KEY CHANGES

Focus

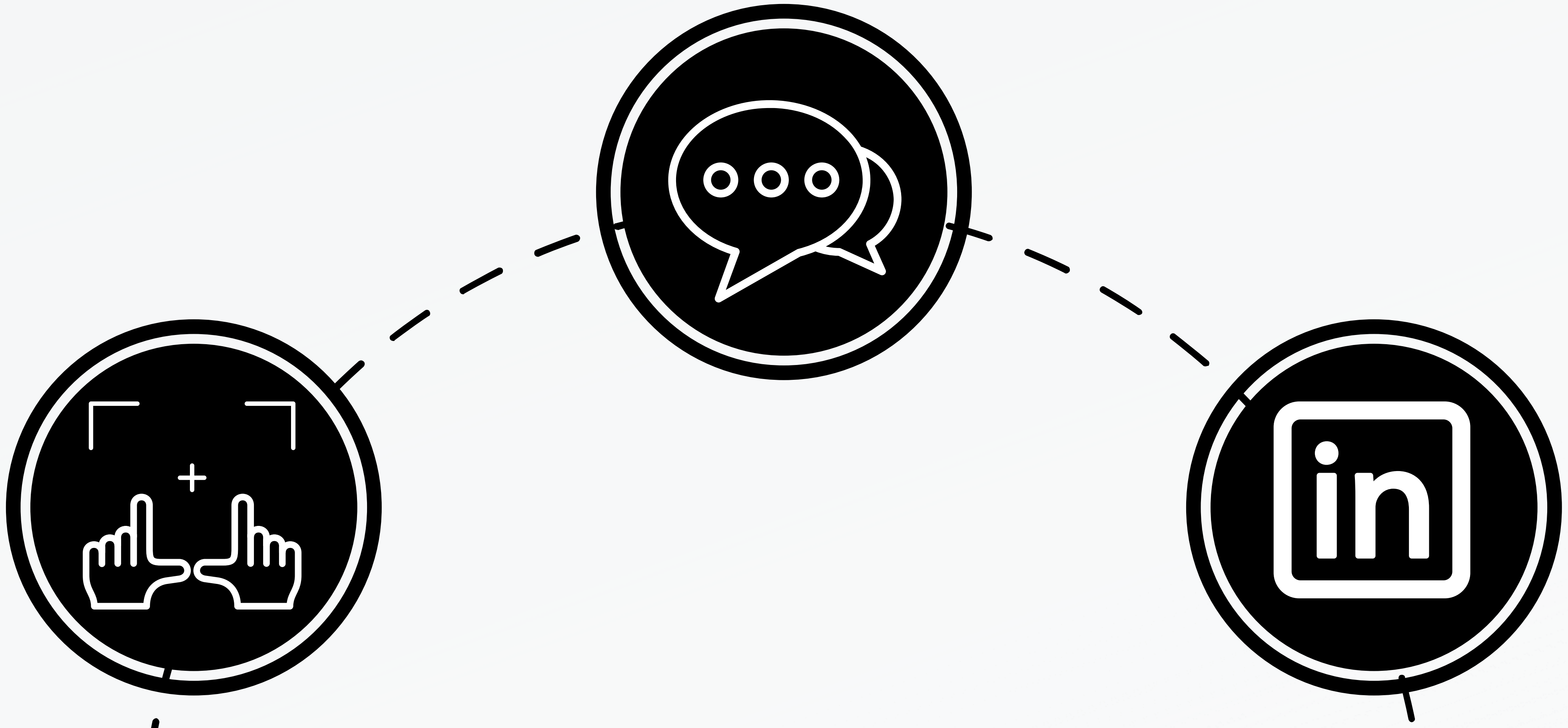
Instead of doing more of what doesn’t work, you must narrow your focus to the prosects that are your best clients. Create focus in your targeted prospecting campaigns. You must improve your delivery and conversions at each stage.

Messaging

You need to clearly communicate what you do, and how you do it, in a way that connects with your ICP. This should be crafted for each specific stage of the process and tool/method you’re using.

Social Selling

Leaders need to implement social selling to establish their brand early in the buying cycle, positioning themselves as industry experts before prospecting begins. This builds credibility, trust, and influence, that will lead to better sales results.



THE PARTS

SOCIAL SELLING

CREATE INFLUENCE

REPUTATION

An influential reputation on LinkedIn establishes credibility, fosters trust, and attracts potential clients and partners. By consistently sharing valuable insights and engaging with your network, you position yourself as a thought leader in your industry.

REACH

Having reach on LinkedIn means connecting with a broad and relevant audience, expanding visibility, and increasing engagement. It allows you to influence more people, build relationships, and amplify your professional brand.

TARGETED CAMPAIGNS

MULTI-CHANNEL

CHANNELS

Use a combination of prospecting activities; Cold Call, Email, Walk-in, Direct Mail, Networking, Referrals, LinkedIn

CADENCE

Decide on campaign length; 30-Day or 12-Week. Then plan out the order of prospecting activities over the course of the campaign.

30-DAY EXAMPLE

NETWORKING LOCAL/GLOBAL

EFFECTIVE NETWORKING

LOCAL

Each sales rep should have a detailed plan to utilize 2 - 3 networking groups in their local market to connect with their ICP. Chamber of Commerce, SHRM, and/or Industry Association

GLOBAL

Each sales rep should also belong to 1 - 2 Industry Trade Associations and attend their conferences, and belong to 1 - 2 LinkedIn Industry Groups and contribute regularly.

REFERRAL NETWORK

DEDICATED GROUP

4 REFERRAL PARTNERS

Each sales rep should have 4 referral partners that sell to, or are networked with, the same target ICP. They will meet with one referral partner each week, giving them four referral meetings monthly. They must educate their referral partners on what a good referral is and the techniques to maximize referrals. They also must be prepared to reciprocate.

PUTTING IT ALL TOGETHER

STEP 1

The Foundation

Define Your Ideal Client Profile (ICP):

- Clarify the demographics, pain points, and desired outcomes of your ideal clients.
- Focus on who the decision-makers are in the target organizations.

Create a Unique Value Proposition (UVP):

- Clearly define what makes your service unique and valuable to your ICP.
- Connect your UVP to the specific pain points and desired outcomes of your target market.

Identify What "Good" Business Looks Like:

- Outline your definition of high-quality business to help focus efforts on the best clients.
- Ensure your sales, marketing, and recruiting systems serve this defined "good business."

Verify Your Service’s Quality:

- Get testimonials, ratings, and case studies that demonstrate the quality and effectiveness of your service.

STEP 2

Key Components of Modern Staffing Sales System:

Focus:

- Narrow your focus to target only the best clients who match your ICP.
- Refine prospecting campaigns to improve delivery and conversions at each stage.

Messaging:

- Craft clear messaging that explains your service and how it connects with the pain points of your ICP.
- Tailor messaging for each stage of the sales process and use appropriate tools to communicate it.

Social Selling:

- Establish your personal brand early in the buying cycle by positioning yourself as an industry expert.
- Build credibility and trust by sharing valuable insights and engaging with your network.
- Use social selling to create influence, reputation, and expand your reach on platforms like LinkedIn

STEP 3

Create a Targeted Multi-Channel Campaign:

Target Only ICP Prospects:

- Focus your prospecting efforts exclusively on your Ideal Client Profile (ICP) to ensure you're reaching the right decision-makers with the highest potential for conversion.

Tailor Channels & Cadence:

- Choose the appropriate channels (e.g., cold calling, email, LinkedIn, direct mail, referrals) based on where your ICP is most active.
- Plan the campaign cadence (e.g., 30-day or 12-week) and order of activities to ensure a strategic, consistent approach.

Deliver Custom-Tailored Messaging:

- Craft specific messaging for each channel and stage of the sales process, ensuring it resonates with your ICP’s pain points and desired outcomes.
- Adjust the tone, format, and call-to-action for each channel to maximize engagement and conversion at every step.

STEP 4

Networking & Referrals:

Local & Global Networking:

- Encourage sales reps to participate in local networking groups like the Chamber of Commerce and SHRM.
- Attend industry conferences and belong to relevant LinkedIn groups for broader influence.

Referral Network:

- Cultivate relationships with 4 referral partners who work with or are connected to your ICP.
- Meet with referral partners regularly, educate them on what constitutes a good referral, and ensure a mutual exchange of referrals.

POTENTIAL SDR WEEK

	Potential Schedule - Week				
	Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
8:30 AM	Review Weekly Plan & Follow Ups	Review Daily Plan & Follow Ups	Review Daily Plan & Follow Ups	Review Daily Plan & Follow Ups	Review Daily Plan & Follow Ups
9:00 AM	Social Selling Plan	Social Selling Plan	Social Selling Plan	Social Selling Plan	Social Selling Plan
9:30 AM					
10:00 AM	**Email**	**Email**	**Email**	**Email**	**Email**
10:30 AM	**Sales & Marketing Meeting**	Networking Event	Targeted Prospecting Campaign	Referral Network	Targeted Prospecting Campaign
11:00 AM					
11:30 AM					
12:00 PM					
12:30 PM	**LUNCH**	**LUNCH**	**LUNCH**	**LUNCH**	**LUNCH**
1:00 PM	Email/LinkedIn Inbox	Email/LinkedIn Inbox	Email/LinkedIn Inbox	Email/LinkedIn Inbox	Email/LinkedIn Inbox
1:30 PM	Targeted Prospecting Campaign	Targeted Prospecting Campaign		Targeted Prospecting Campaign	
2:00 PM					
2:30 PM					
3:00 PM					Email/LinkedIn Inbox
3:30 PM					Plan Next Week
4:00 PM					
4:30 PM	Email/LinkedIn Inbox	Email/LinkedIn Inbox	Email/LinkedIn Inbox	Email/LinkedIn Inbox	EOW Report - SAT, KPI Tracker

MEASURE

AND REPORT

SALES
PERFORMANCE
METRICS

DEFINE: SALES PERFORMANCE

Sales Performance Metrics are the measurements of activities and the results of those activities through the prospecting and sales process. These include any prospecting activities like cold calls, emails, walk-ins, networking, referrals etc. They also include the results of those activities; meetings, proposals, contracts, and billing clients.

MEASURE: PROSPECTING PERFORMANCE

Ultimately you are measuring how many activities it requires to acquire a billing client. You will track each individual salespersons prospecting activities in a Sales Activity Tracker (SAT) so you can determine how many calls, emails, visits, etc that they perform. The SAT will identify how many activities it takes to get one sales meeting. It should also tell you which activities perform better.

1 Meetings / 100 Activities = 1% Meeting Conversion Rate

100 Meetings / 10,000 Activities = 1% Meeting Conversion Rate

*200 Activities per week.

MEASURE: SALES PERFORMANCE

The Sales Activity Tracker should also identify how many meetings it takes to submit a proposal, giving you the proposal conversion rate.

70 Proposals / 100 Meetings = 70% Proposal Conversion Rate

MEASURE: SALES PERFORMANCE

The Sales Activity Tracker should also identify how many proposals it takes to get a signed contract, giving you the contract conversion rate.

35 Contracts / 70 Proposals = 50% Contract Conversion Rate

MEASURE: SALES PERFORMANCE

The Sales Activity Tracker should also identify how many contracts it takes to get a billing client, giving you the client conversion rate.

30 Clients / 35 Contracts = 86% Client Conversion Rate

USE: SALES PERFORMANCE

Knowing how many prospecting activities it takes to ultimately lead to billing client allows you to determine if growth goals are feasible, if you have the right resources to succeed, and how to plan the work.

If you know you need 30 new clients to achieve your goals, you will be able to plan the work accordingly. (or know you don’t have the resources to achieve this goal)

SALES ACTIVITY TRACKER

Week	Start	End	Calls	Emails	Walk-Ins	Meetings	Proposals	Contracts
1	12/31/2023	1/6/2024						
2	1/7/2024	1/13/2024						
3	1/14/2024	1/20/2024						
4	1/21/2024	1/27/2024						
5	1/28/2024	2/3/2024						
6	2/4/2024	2/10/2024						
7	2/11/2024	2/17/2024						
8	2/18/2024	2/24/2024						
9	2/25/2024	3/2/2024						
10	3/3/2024	3/9/2024						
11	3/10/2024	3/16/2024						
12	3/17/2024	3/23/2024						
13	3/24/2024	3/30/2024						
14	3/31/2024	4/6/2024						
15	4/7/2024	4/13/2024						
16	4/14/2024	4/20/2024						
17	4/21/2024	4/27/2024						
18	4/28/2024	5/4/2024						
19	5/5/2024	5/11/2024						
20	5/12/2024	5/18/2024						
21	5/19/2024	5/25/2024						
22	5/26/2024	6/1/2024						
23	6/2/2024	6/8/2024						
24	6/9/2024	6/15/2024						
25	6/16/2024	6/22/2024						
26	6/23/2024	6/29/2024						
27	6/30/2024	7/6/2024						

Q1 Conversion Rates	Input	Output	Conv%
Meeting Conv.	-	-	0%
Proposal Conv.	-	-	0%
Contracts Conv.	-	-	0%

Q2 Conversion Rates	Input	Output	Conv%
Meeting Conv.	-	-	0%
Proposal Conv.	-	-	0%
Contracts Conv.	-	-	0%

Q3 Conversion Rates	Input	Output	Conv%
Meeting Conv.	-	-	0%
Proposal Conv.	-	-	0%
Contracts Conv.	-	-	0%

Q4 Conversion Rates	Input	Output	Conv%
Meeting Conv.	-	-	0%
Proposal Conv.	-	-	0%
Contracts Conv.	-	-	0%

Total Conversion Rates	Input	Output	Conv%
Meeting Conv.	-	-	0%
Proposal Conv.	-	-	0%
Contracts Conv.	-	13	0%

Category	Metric	Conversion
Total New Contracts	13	
Total New Contracts - JO	-	0%
Total New Clients - Billed	-	0%

Category	Metric
Proposals to Get 1 Billing Client	#DIV/0!
Meetings to Get 1 Billing Client	#DIV/0!
Activities to Get 1 Billing Client	#DIV/0!

Annual Target	Actual	Needed
Annual GM of New Client	$ 25,000	
Activities per week	#DIV/0!	#DIV/0!
Billing Clients per week	#DIV/0!	0.54

LET’S DISCUSS

SLIDES AND BONUS MATERIAL

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