

# Outreach Challenge

**Week 2** (of 4)

with Jeff Molander

Founder





**“Best”**

# Kevin Casey

Executive VP & Partner



Cal LeGrow Insurance  
&  
Financial Group



Financial Services - Insurance

# OLD MESSAGE

 ...lets try this again.



**Kevin Casey**

To: Ron Fougere; Cc: Barry Rose; Eric Milley

Wednesday, May 26, 2021 at 4:46 PM

Hi Eric,

Kevin Casey here, one of the owners here at Cal LeGrow.

We first talked to Ron about an opportunity to give you folks a 'second look' at your insurance about 20 months ago but this thing called a GLOBAL PANDEMIC rudely got in the way.

Just chatted to Ron again to dust this off and he suggested we reach out and try and make this as painless as possible for you and see if we can give you another option to think about.

Would you be able to find 10 minutes to chat – zoom or phone whatever you prefer – and we will talk it over?

Thanks



**KEVIN CASEY**

Executive Vice President, Partner  
Cal LeGrow Insurance & Financial Group

 709.778.4124  
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# NEW MESSAGE

Re: premium drop

Eric,  
Ron asked me to connect.

Observing an increasing appetite by a niche insurance carrier for architect and design firms. This has led to a 14.6%, 11.3% and 18.3% reduction in annual premium YOY among 3 design companies in the province this year.

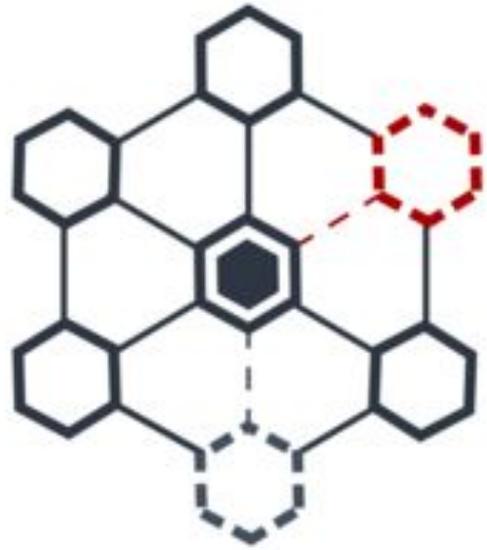
Not even sure if this would be a fit for Fougere Architects.

Open to a short email exchange to see if a conversation makes sense?

Kevin

# Deepak Raj

Business Development Executive



KYC - Chain



Professional Services - SDR & Business Development Services

# Dubai - Precious metal KYCC campaign (New emails)

[UAE based precious metal trading firms (including gold refineries and gold trading)]

# Email #1 - Option 1 (OLD)

Subject: KYC for Gold & Silver Refineries

FIRSTNAME,

Are you manually collecting information from your customers for KYC verification and onboarding?

If yes, are you free for a quick chat?

Al Ethihad, a fast-growing gold and silver refinery and trading firm is using KYC-Chain for streamlining the customer onboarding and KYC AML checks. (happy to discuss more in detail)

We can help in digitizing the customer onboarding questionnaires and forms, ID verification checks, watchlist screening (including sanctions, PEP and adverse media checks), document authentication, business registry checks and UBO verifications – all in one solution with risk scoring and audit trail for regulators.

With the recent DMCC KYC guidelines, the compliance processes can be resource-intensive, complex and time-consuming. KYC-Chain can solve these challenges and provide your customers with seamless onboarding experience.

Can we connect for a short call to learn more?

Kind Regards,  
Deepak



# Email #1 - Option 1 (NEW)

Subject: CBUAE (or) DMCC

FIRSTNAME,

How are you managing your compliance processes at COMPANYNAME?

AI Ethihad is automating onboarding process and KYC'ing faster with confidence – all according to DMCC/CBUAE guidelines.

Open to hearing how they do it?

Kind Regards,  
Deepak

# Email #1 - Option 2 (NEW)

Subject: doing everything

FIRSTNAME,

Are you doing everything possible to leverage tech for KYC – instead of manual review?

Al Ethihad has automated KYC and verifying customers with confidence – all while keeping up with DMCC/CBUAE laws.

Open to hearing how they do it?

Kind Regards,  
Deepak

# NFT Marketplace Campaign

# Old email #1:

Subject: are you starting?

FIRSTNAME,

Have you considered these expert opinions that NFTs will also make it an easier target for money laundering than the traditional art world?

KYC-Chain along with Selfkey -- we can work together to provide verifiable credentials that a NFT belongs to a user. Also, we can help perform the KYC/AML checks for users on withdrawal of fiat/crypto from your NFT platform.

Are you open to hearing more?

Kind Regards,  
Deepak

# NEW Email #1

Subject: NFT compliance (or) ripe for ML? (or) quick question (or) compliance

Joe,

How are you able to determine if your NFT users are not laundering money with Opensea?

Experts believe that NFT marketplaces might be ripe for money laundering and require strict KYC/AML standards.

Open to hearing an idea to tackle this?

If not, no worries.

Kind Regards,  
Deepak

# SDR as a service

**(Scenarios where there is no open SDR role)**

# **OLD - Message 1**

Sub: trying to help

Hi FIRSTNAME,

I came across COMPANYNAME today and would be happy if there are any opportunities in working together. In nutshell, I have extensive experience working in sales development and marketing support for B2B companies like COMPANYNAME.

Just to make it easy for you;

In Sales development, I have 6 years of experience working in prospecting, lead generation, and outbound campaigns to generate sales qualified opportunities for your sales reps. I can be very helpful in ensuring the sales pipeline is filled constantly with qualified leads for closing more deals.

In Marketing, I have good experience creating topical blog posts, conducting competitor research and managing paid ads.

I would be very happy to work with you in the above areas at an affordable model to add value to COMPANYNAME.

Are you available for a call next week to discuss in detail?

With your success in mind,  
Deepak



[Prospects without open SDR roles but may consider hiring one]

## **Outreach - Message 1 NEW**

Subject: worth considering

FIRSTNAME,

How are you making sure that your AEs are focused on closing deals? --- rather than finding new prospects.

(OR)

How are you making sure that the pipeline is filled constantly with sales qualified opportunities?

Kind Regards,  
Deepak

[Prospects without open SDR roles but may consider hiring one]

## **Outreach - Message 1 (Option 2) NEW**

Subject: all set

FIRSTNAME,

Noticing you have a small sales team of 4.

They must be filling the sales pipeline constantly with qualified leads and closing more deals.

Kind Regards,  
Deepak

# Kirsten Reisfield

Enterprise Account Manager



Information Technology & Services



# Homework message 1 [OLD]

**Subject: Intro**

Hi XXX,

I am reaching out to introduce myself. I am XXX's dedicated account manager here at HP.

Do you see benefit in meeting sometime this week or next, to discuss below?

- Brief over the phone intros
- Update on Supply chain - state of the business
- With supply constraints expected to go into 2023, we are currently helping customers with short and long term planning
- Discuss any ways we can help maximize savings via volume discounts.

# Homework message 1 [New]

**NEW Title: curious? Or “Just in case”**

Hi xxx,

There is a lot of volatility in the PC market right now.

Open to a brief conversation, so we are not strangers if a need arises?

Kirsten

# Suggestion: Periodic follow-up (stay on the radar)

- Over time, collect your own insights
  - \* Distilled “ah-ha” moments
  - \* *Original* thought & analytical (e.g. analysis of 2-3 trends)
  - \* Action-oriented
  - \* Experience-based (otherwise unknown/hidden)
- Once every month or two send provocative email
  - \* “This piqued me and triggered me to think of you **because \_\_\_\_\_**” [what you know about them]
  - \* No linking to Web sites

# Homework message 2 [OLD]

**OLD Subject: laptop supply issues?**

XXXX,

I know everyone is challenged with supply issues and this is not the first time. Remember the Intel shortages from a few years back or the memory and SSD shortages from before that.

A dual vendor approach can reduce risk. HP is here to help.

# Homework message 2 [OLD]

**OLD Subject: laptop supply issues?**

XXXX,

I know everyone is challenged with supply issues and this is not the first time. Remember the Intel shortages from a few years back or the memory and SSD shortages from before that.

A dual vendor approach can reduce risk. HP is here to help.

## Homework message 2 [NEW]

**Subject: PC supply idea**

Still seems dangerous;  
get more abstract.  
eg. “benchmark?”

Hi XXX

What do you have in place to ensure current laptop shortages don't disrupt return to office plans? Not sure if this idea works for you, but we could map your current standards to our offerings. This would get some of the upfront work out of the way giving CUSTOMER potential flexibility in the event of a supply chain challenge. We could take that a step further and give you an opportunity to benchmark your pricing.

Do you find value in this approach? If not no worries.

Kirsten

## Homework message 2 [NEW]

**Subject: PC supply idea**

Nicely done

Hi XXX

What do you have in place to ensure current laptop shortages don't disrupt return to office plans? Not sure if this idea works for you, but we could map your current standards to our offerings. This would get some of the upfront work out of the way giving CUSTOMER potential flexibility in the event of a supply chain challenge. We could take that a step further and give you an opportunity to benchmark your pricing.

Do you find value in this approach? If not no worries.

Kirsten

## Homework message 2 [NEW]

**Subject: PC supply idea**

Hi XXX

What do you have in place to ensure current laptop shortages don't disrupt return to office plans? **Not sure if this idea works for you, but we could map your current standards to our offerings. This would get some of the upfront work out of the way giving CUSTOMER potential flexibility in the event of a supply chain challenge.** We could take that a step further and give you an opportunity to benchmark your pricing.

Do you find value in this approach? If not no worries.

Kirsten

Nicely done.  
Reduce words a bit.

## Homework message 2 [NEW]

Ok?

**Subject: PC supply idea**

Hi XXX

What do you have in place to ensure current laptop shortages don't disrupt return to office plans? **Not sure if this works, but you might map current standards to our offerings. This would reduce upfront work -- providing flexibility should a supply chain challenge arise.** We could take that a step further and give you an opportunity to benchmark your pricing.

Do you find value in this approach? If not no worries.

Kirsten

## Homework message 2 [NEW]

**Subject: PC supply idea**

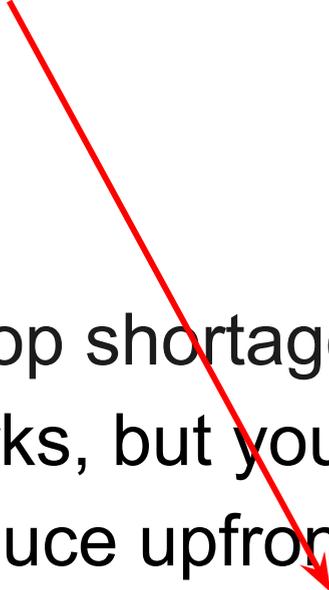
Hi XXX

What do you have in place to ensure current laptop shortages don't disrupt return to office plans? Not sure if this works, but you might map current standards to our offerings. This would reduce upfront work -- providing flexibility should a supply chain challenge arise. **We could take that a step further and benchmark pricing.**

Do you find value in this approach? If not no worries.

Kirsten

Trim up...



## Homework message 2 [NEW]

Optional.

**Subject: PC supply idea**

Hi XXX

What do you have in place to ensure current laptop shortages don't disrupt return to office plans? Not sure if this works, but you might map current standards to our offerings. This would reduce upfront work -- providing flexibility should a supply chain challenge arise. We could take that a step further and benchmark pricing.

Would you be opposed to this approach?

Kirsten

# Steven Rosen

Founder & Coach



STAR Results



Professional Services - Sales Leadership Coaching

# LinkedIn Invite

You have a very impressive sales leadership background. How are you enjoying your new role? I like to connect with like-minded people who share your passion for sales leadership.

If it makes sense to connect, please accept my invitation

Steven

# First Message

FN,

It's great to connect with you on LinkedIn!

The first 90 days in a new leadership role can feel like you are drinking from a fire hose. Yet they are critical to your success.

What are you doing to ensure that you can successfully onboard?

I have an idea. May I share?

Steven

# SUGGESTIONS

FN,

You're in the first 90 days, eh? It can feel like you are drinking from a fire hose. What are you doing to ensure a successful onboard?

I have an idea. May I share?

Steven

# RESPONSES RECEIVED

- Sure
- Yes
- Of course
- Go for it
- What do you suggest

# ACTUAL RESPONSE

“Advice is always welcome”

# STEVEN'S RESPONSE

Here are a couple of pieces of advice that may help. Sure. Successful sales leaders develop a comprehensive 30-60-90-day plan. They focus on building a foundation of trust with their team early on. What have you done to ensure that you establish your leadership in the first 90 days?

# SUGGESTION - shorter

Be sure to develop a comprehensive 30-60-90-day plan -- to build a foundation of trust with your team early on. What actions are you taking -- to ensure you establish leadership in the first 90 days?

**NO RESPONSE**

# STEVEN'S RESPONSE

Does Tolmar have an onboarding program to support you?

# ACTUAL RESPONSE

“Yes”

# STEVEN'S RESPONSE

Would you like to accelerate your onboarding and start building a high-performance team?

# SUGGESTION

What would you be willing to put up with --  
to start building a high-performance team?  
:)

# SUGGESTION

Are there any missing pieces to it?

# SUGGESTION

Is it giving you everything needed?

## Steven's response (2nd Message)

Sure. Successful sales leaders develop a comprehensive 30-60-90-day plan. They focus on building a foundation of trust with their team early on.

What have you done to ensure that you establish your leadership in the first 90 days?

Or

I would like to know more about your sales team and organization before making any suggestions. (Used for response “what do you suggest?”)

# RESPONSES RECEIVED

- The same
- Notice there is only one person

# Next Question

- How are you evaluating the success of your onboarding?



**See you Monday**

**“Send me info” &  
“not interested”**

**with Jeff Molander**

**Founder**



# Sheldon Merriman

Director



Staffing - Actuarial & Data Science recruitment.