

Outreach Challenge

Week 3 (of 4)

with Jeff Molander

Founder



Steven Rosen

Founder & Coach



STAR Results



Professional Services - Sales Leadership Coaching

Kevin Casey

Executive VP & Partner



Cal LeGrow Insurance
&
Financial Group



Financial Services - Insurance

From last Friday

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

New! -- Started w/ this on May 26

Health issues in June & got back in touch in August (8/18) suggesting September

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



Sent Yesterday -- Breakup

To: Eric, Ron & Barry

Subject: nag no more ...

Eric/Ron,
Nagging sucks and we nagged you gents enough.

Sounds like things are working well for you with Cooperators and that's totally okay.

Zero hard feelings.

Keep doing what you all do so well.

Cheers

Kevin

New!

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.

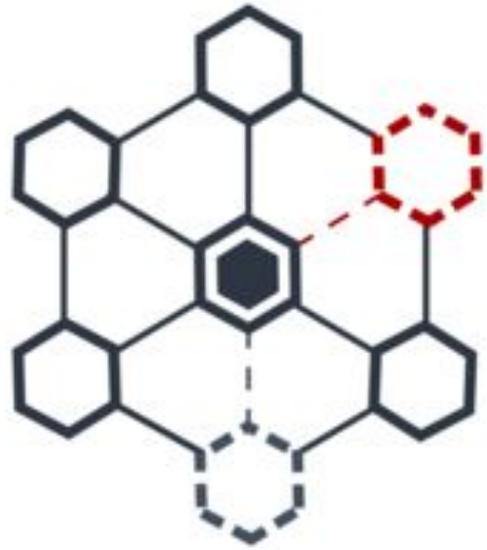
Not even sure if this would be a fit for Fougere Architects.

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

Email #1

(scenario: if I know they are using a competitor product)

Subject: Onfido?

Clement,
I saw you are using Onfido's KYC solution.

**This may interest you,
Kirsten
(deals w/ competitor)**

Some crypto OTC desk are **switching** to other KYC solutions due to: **complexity of onboarding institutions**; and reducing manual review with global AML coverage.

KYC-Chain could be a fit, but not sure yet.

Are you open for a short email exchange to see if a longer conversation is justifiable?

QCP Capital, Orichal partners and other OTC desks are already using KYC-Chain.

Kind Regards,
Deepak

Follow up #1

Subject: thoughts?

Martin, thoughts re: the below?

Deepak

Follow up #2

Subject: blessing

Not sure if it's a fit, but this could be a blessing in disguise.

QCP is automating their KYC AML processes and is onboarding OTC traders faster and reduced fraud.

Deepak

Follow up #3

Subject: sorry

Martin, did you see the previous message?

Sorry to nag. May I share insights into how QCP Capital and Gebo are verifying clients faster and preventing fraud?

Deepak

Follow up #4

Subject: compliance issue

Martin, how are you managing to verify HNWI and entities? – while keeping up with growing KYC AML regulations

Deepak

Kirsten Reisfield

Enterprise Account Manager



Information Technology & Services



Homework - continued revision

Subject: Laptop supply

Not sure if this idea works for you. I'm seeing others successfully leverage a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

← Timely? But worries me. (others)
Alt: “disruption” or “dual strat”

Not sure if this idea works for you. I’m seeing others successfully leverage a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

Your having uncertainty at open *can* work.
It can also sabotage but take the risk.

Not sure if this idea works for you. I'm seeing others successfully leverage a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

Referencing yourself isn't earning anything here.



Not sure if this idea works for you. **I'm seeing** others successfully leverage a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

A competitor or recognized brand would be stronger.



Not sure if this idea works for you. **Others** are successfully leverage a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

Like this.



Not sure if this idea works for you. _____ is successfully leveraging a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

Unnecessary in my estimation.



Not sure if this idea works for you. _____ is **successfully** leveraging a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Stronger word?

Subject: Laptop supply

Not sure if this idea works for you. _____ is **leveraging** a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Stronger word?

Subject: Laptop supply

Not sure if this idea works for you. _____ is **exploiting** a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

Is this 'special' enough?



Not sure if this idea works for you. _____ is exploiting a **dual OEM strategy** to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

Ok. Or go for a “no” instead.

Not sure if this idea works for you. _____ is exploiting a dual OEM strategy to mitigate current supply disruptions.

Open to a brief exchange to see if this could work for XXX?

If not no worries

Kirsten

Homework - continued revision

Subject: Laptop supply

Like this.

Not sure if this idea works for you. _____ is exploiting a dual OEM strategy to mitigate current supply disruptions.

Are you opposed to considering, NAME?

Kirsten

Homework - continued revision

Subject: Laptop supply

Or, very bluntly.

Not sure if this idea works for you. _____ is exploiting a dual OEM strategy to mitigate current supply disruptions.

What's your plan?

Kirsten

From last Friday

About what?

NEW Title: 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

From last Friday

??? (Give them a reason to talk)

NEW Title: Just in case

Hi xxx,

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

Open to an idea I have -- about mitigating future laptop supply disruptions?

Kirsten

From last Friday

Alternate.

NEW Title: Just in case

Hi xxx,

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

Am I out of place -- to share an idea about mitigating future laptop supply disruptions?

Kirsten

From last Friday

Alternate.

NEW Title: Just in case

Hi xxx,

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

Is it too early -- to share an idea about mitigating future laptop supply disruptions?

Kirsten



See you Monday

**“Send me info” &
“not interested”**

with Jeff Molander

Founder



Sheldon Merriman

Director



Staffing - Actuarial & Data Science recruitment.