WEEK 3
Challenge: Find and Access Your Clients

✓ First, read or listen to **Week 3: Find Your Clients** in *It Starts with Clients* (pages 38-50 in the hardcover version)

In order to create a healthy pipeline of potential opportunities, you need to start at the top of the sales funnel and ensure you are getting in front of enough current and prospective clients. Today, few businesses can just sit and wait to be called. What happens, however, is that you get busy and stop engaging in the outreach that is critical to filling your pipeline.

This week, you're going to create a list of executives—both new prospects and current clients—with whom you want to meet. You should aim at five outreaches a week, unless you're in full-time sales, in which case this number will be much higher. An outreach=a face-to-face conversation, a phone call, an email you send requesting a meeting, a personal note (perhaps with an article attached), and so on. But remember, all outreaches are aimed at getting a face-to-face meeting, unless geographic distance absolutely prohibits this, in which case you ask for a phone call.

What is the purpose of your meetings? It will be some combination of the following, depending on the person:

- Better understand their highest-priority issues
- Deepen trust and personal knowledge
- Strengthen your credibility
- And…hopefully…identify a commercial opportunity you can help them with

There are three categories of clients/prospects you'll create lists for. These are in order of priority:

1. Current clients. Normally these represent your best and most immediate growth opportunities.
2. Past clients. Past, satisfied clients know you and trust you, and also represent high-potential growth opportunities.
3. VIP Contacts. For example, prospects who are decision makers and influencers.

Now, time to make your calling lists!

Be sure to review pages 43-47 in the hardcover version of *It Starts with Clients*, which set out 12 ways to gain access to client executives.

Assignment
Create Your Calling Lists

Instructions: Fill out as many names as you can for executives you want to meet with to discuss their needs and share your thought leadership. These should be decision makers (someone who can authorize buying your products or services), people who can lead you to a decision maker, or senior influencers. There are three categories: Current clients, past clients, and VIP contacts.

I. Current Clients		
Name	**Company**	**Next Step**
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

II. Past Clients		
Name	**Company**	**Next Step**
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

III. Other VIP Contacts (Buyers/Decision Makers, influencers—or people who can lead you to them)		
Name	**Company**	**Next Step**
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		