

Compliments of Stacey Shanner

ISSUE 10

# BUSINESS

IN ACTION

*Have a  
successful  
holiday  
season!*



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ISSUE 10  
COVER PRICE \$6.99

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## Front of Tear Out Card 1



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## Back of Tear Out Card 1



**01 / BE PRECISE**  
Set specific goals, such as a certain percentage increase in sales or a revenue target. From there, determine the action items that can help you meet them.

**02 / SET MICRO GOALS**  
Once you have defined your main goals, establish small weekly or monthly milestones like sales quotas or certain tasks to complete. This will give you a clear path toward your larger objectives.

**03 / DELEGATE TASKS**  
Find ways to use your employees' skills to their fullest potential. Bring your team members into your plans for the year, and assign objectives based on their individual strengths or roles.

**04 / ASSESS THROUGHOUT THE YEAR**  
Schedule monthly meetings to track your progress and assess what is and isn't working. This is your chance to review your progress toward meeting your goals by the end of the year.

Dear Bill and Judy,

The holiday season is a busy time for everyone, but it can be even busier for a business owner or entrepreneur. This issue of Business in Action offers tools and expert tips to help you manage it all, including a primer for setting business resolutions, a guide to finding your “why,” and a rundown of how to run seasonal business.

As we head into the end of the year, you’re likely thinking ahead to what you want to achieve in 2024. Inside you’ll find ideas to help you seamlessly weave personal and business goals together to set yourself up for success.

Sherri Somers-Bell is a motivational speaker and business coach who has helped thousands of women find success in their businesses without sacrificing happiness in their personal lives. In this issue, she explains how finding your core motivation can help you have it all.

Despite having clear peak and off-peak seasons, seasonal businesses can be among the most successful if managed properly. Be sure to read the enclosed article for how to overcome potential obstacles and seize every opportunity as a seasonal business owner.

Here’s to a happy and prosperous holiday season. As always, it’s a pleasure to send you this magazine.

**Stacey Shanner**



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PRODUCTIVITY

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PRODUCTIVITY

# Set Smarter New Year Goals

As 2024 approaches, use these four strategies to establish and achieve clear objectives for your organization. BY ALLISON GOMES

**FROM PERSONAL** improvements to professional growth, New Year's resolutions are intended to help us grow as individuals in different areas—and they can help your business too. Just as you may examine your own health and target your goals toward correcting bad habits or establishing new routines, you can examine the health of your business to better your company in the new year. As you prepare to begin this process, implement these strategies to help shape your business goals and set your organization up for success.

**Be precise**  
It's hard to accomplish a goal if you don't know what you're working toward, but it's not enough to just say you want to improve your business. Instead, set specific goals for your organization, such as a certain percentage increase in sales numbers or a target revenue number. When you have a clear idea of what you want to accomplish, you can

better determine what you need to do to meet those goals.

**Set micro goals**  
Once you have specific goals in mind, you'll want to establish smaller objectives that will help you reach them. These micro goals are weekly or monthly milestones, such as a specific sales number or number of tasks to complete, that you and your team will work toward throughout the year. This way, you'll have a clear path toward your larger objectives that will both make them seem doable and create a sense of accomplishment that motivates your team to keep working hard.

**Delegate tasks**  
Your business's New Year's resolutions aren't something you can accomplish alone, which is why you must find ways to use your employees' skills to their fullest potential. Once you've established your goals, or perhaps even while you're still in the process of doing so, bring your team members into your plans to get everyone on the

same page. This will make sure that you're all working toward the same result and are each doing your part to achieve it.

**Assess throughout the year**  
To ensure that you're still on pace to meet your business goals, you'll need to track your progress throughout the year and assess what is and isn't working. Meet with your team at least once a month to discuss where you're at and what could be done differently. This is your chance to adjust course if need be so you can avoid going too far off track and instead continue striving toward meeting your goals by the end of the year.

New Year's resolutions provide a great opportunity to improve various aspects of your business. And while results won't just happen overnight, if your team stays consistent and communicates regularly, you will wind up at a better place than where you started. ■



**Find specific areas of your business that you want to improve, and establish paths to do so. Discuss your plans with your team to make sure everyone is on the same page going into the new year.**



# Increase Your Sales with an Organized Contact List

The new year is an ideal time to take a step back and review your business strategy. Evaluate your current customer base to identify opportunities to expand it along with trends that may be beneficial for your business.

BY BONNIE JOFFE

**CONTACT :** \_\_\_\_\_  
**TEL :** \_\_\_\_\_  
**NOTES:** \_\_\_\_\_

**A**

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**F**

**C**



**IT CAN BE EASY** to let your client and prospective client list go by the wayside—just keeping up with your day-to-day tasks can be challenging enough. However, a disorganized list can cost you money and sales. Conversely, having a well-organized, up-to-date one can help you improve your business systems, customer retention, and productivity. With the new year just around the corner, now could be a great time to reevaluate the efficacy of your customer communication and where you can make improvements.

#### 🕒 **Get organized**

Sorting through your database may seem like a gargantuan task, but the results will be well worth your time. Parsing your list will help you gain perspective on how many customers you have, keep track of repeat customers, note the average amount each customer has spent, and identify which products and services are most popular.

#### **Scrub your database**

At first glance, it can appear as if you have a robust contact list. However, in reality, you may actually have several entries that should no longer be there. So scrubbing your list—deleting inactive subscribers,

duplicate or outdated records, and incorrect contact information—should be your first step in organizing your database. (But consider contacting the inactive ones before removing them.) This can also help you improve your email campaigns’ open and click-through rates and minimize spam reports.

#### **Fill in missing information**

It’s essential to have a complete profile of all your contacts in order to communicate with them effectively. Besides their name (first and last), you should have their current email address, cell phone number, company name, web address, and desired way to be contacted. You should also try to obtain extra information, such as birthdays, weddings, anniversaries, the birth of a child, or the death of a loved one, so you can acknowledge these events, which will help build goodwill and stronger relationships.

#### 🕒 **Manage your list in a CRM**

Each business utilizes its CRM for different needs. Your company’s size, industry, and marketing goals will likely dictate how you input and access your contacts’ information, which is the key to managing and monitoring your business activity. You can either make changes to your client list in your CRM or import an updated one from



an Excel spreadsheet, replacing the old with the new. To obtain the best outcomes, consider implementing the following strategies.

#### **Segment your lists**

It’s crucial to diversify and target your messages to your contacts, but without a segmented list, it will be impossible to do so. Categorizing them makes it easier to communicate with them and implement effective drip campaigns for all your existing clients, warm prospects, and cold leads. The content and methods

you use to interact with them will likely vary based on their interest and purchase history. For example, if your company is a B2B, separate your contacts by their profession or specialty so you can send them a targeted message, such as a notification of a special event or conference you think they would enjoy. On the other hand, if you’re a consumer-based business, you may want to sort your contacts by region; this will enable you to send greetings to people living in a specific area that could benefit from your product

or service at certain times of the year. It’s all about reaching the right people at the right time.

#### **Separate personal from business**

Whether they use a mobile device, computer, or even an old-school Rolodex, most people have just one location where all their contacts are stored—both personal and business. However, these lines can become blurred when trying to subdivide your list, especially in cases where a professional relationship morphed into a personal friendship. But there’s no reason you shouldn’t be able to create two lists—one for professional messaging and the other for your personal contacts.

#### **Utilize the CRM automated messaging tools**

When coupled with automated communication tools, a well-organized contact list can be a game-changer for your business. Scheduling tailored emails or texts to send to specific groups will help boost your engagement with them, elevate existing customers’ purchasing habits, and convert prospects into buyers.

#### 🕒 **Identify trends**

A bonus to utilizing the automated tools through your CRM is that you

can also track and identify trends, including how your contacts interact with the content you’re sending, the open and click-through rates, and if there are any requests for more information. In addition, you can gain insight into the communication methods they prefer. (Texting has been shown to be the most effective one.) And through your targeted messaging, you can begin to gauge what delivers the highest rate of return.

#### 🕒 **Re-engage with a past contact**

Once your contact list is updated, you can begin to reconnect with old customers and prospects if there’s been a time lapse since your last communication with them. Whether you reach out via text, email, or phone, use this chance to ask them about their most recent purchase or to inform them of any new products or services your company offers. Their response (or lack thereof) will allow you to determine if there’s a potential sales opportunity or if you need to scrub the contact from your list. ■



**Leverage your CRM to determine which products and services your contacts are interested in and what content keeps them returning for more.**

# Meeting in the Metaverse

Hyperspace CEO Danny Stefanic brings professional hosting to the digital realm.

INTERVIEW WITH **DANNY STEFANIC** | WRITTEN BY **ANDRE RIOS** | PHOTOS COURTESY OF **MOOTUP**

**A** **S THE SO-CALLED** metaverse expands, this lifelike, computer-generated reality has become the new frontier for connecting professionals and their networks. Enter Hyperspace, an innovative 3D immersive digital hosting platform that's surprisingly intuitive. Danny Stefanic, the company's CEO, invited me into his virtual venue to communicate via avatars, or digital likenesses of ourselves. There we discussed his vision for Hyperspace, how professional hosting has changed, and why the metaverse is the next great media type.

## →| What is your history with metaverse technology?

I have nearly thirty years of experience in the virtual reality industry; I actually created the first virtual tours platform back in the 1990s. People could use that service



DANNY STEFANIC

to explore real estate listings over the internet in 3D. I also started the first virtual reality association in 1994.

Hyperspace was initially established as a virtual platform for educational and training events. Our platform quickly garnered praise not only for its effectiveness but also for its ability to connect individuals from various locations and accelerate the

learning process. As we expanded our offerings, Hyperspace began hosting virtual business meetings, leading to some companies adopting the platform as a year-round, virtual headquarters. These organizations create private, 3D virtual worlds, or metaverses, allowing their staff to seamlessly perform a wide range of tasks, such as sales kickoffs, meetings, customer journeys, and customer support.

## →| How can new clients host a Hyperspace event?

We have two main types of customers: those using the platform for events, and those using it year-round as a permanent metaverse for learning, training, etc., which they can revisit over and over again. Clients can reach out to us and describe their intended use for the platform. Based on their needs, we provide



a quote and offer comprehensive onboarding assistance to ensure they feel comfortable navigating the platform and inviting others to join the metaverse.

## →| How does your platform work for new attendees?

Hosts share a link to the metaverse they create with their invite list. After attendees click the link, they create an avatar and then arrive in a 3D space. They also get an introduction from an AI chatbot with its own avatar, which walks them through how to navigate the environment, answers any initial questions, and helps anyone new to the technology get comfortable.

From there, attendees navigate the 3D venue on their own, taking in the sights and such. They can approach other avatars, shake hands, share messages, and interact with their surroundings. For example, there are lounge areas where avatars can sit and converse.

For a bit of extra fun, guests can also perform miniature quests to earn points and win rewards such as branded hats and shirts for their avatars or real-world prizes like Amazon gift cards. We've even had major figures like executives and celebrities provide holograms, which can speak prerecorded content, for events. Microengagements (quick

activities and tasks) like these engage and keep people's attention better than videoconferencing.

Hosts may choose to whisk their attendees away to an auditorium so they can introduce themselves and then kick off their event. They can also share their webcam on a presentation screen to address the crowd. Those who use a private company space regularly can go straight to their usual meeting sites, like conference rooms.

It's a very easy platform to use, even for people who have no metaverse experience.

## →| What makes Hyperspace so simple?

Our secret sauce is the ability to run on any device, including smartphones, tablets, computers, and virtual reality/augmented reality headsets. And you can access the platform without installing or downloading any applications. It's essentially a very immersive 3D web page.

Another helpful aspect is the presence of virtual guides throughout the space. You can click on AI chatbots to ask questions or



get support. Essentially, we're targeting as many people as possible with our technology. Anyone should be able to join from a remote region with an older device and lower bandwidth connection and still enjoy their experience.

### → Do you intend for Hyperspace to replace live event hosting?

No. It's designed to complement and enhance in-person events, serving as a valuable component of the industry, not a substitute. For instance, when you attend a live conference and socialize with others over a drink, you create lasting bonds and memories that can be cherished for years

to come. These powerful connections formed during face-to-face events are instrumental in fostering relationships that you can draw upon later.

You can't form this kind of rapport with someone on Zoom. Our platform is akin to what you experience in real life, but real-world interactions are always way more powerful because so many senses are engaged. That said, on the spectrum of bonding with others, Hyperspace is just short of reality.

There's a distinction between what I call "lean back" and "lean forward"



experiences. With the former, you kick back and watch something, maybe clicking a "next" button to continue now and then. But with "lean forward" events, you perform microengagements to be part of an experience and have actual influence over the event in a way that's unique to you.

For instance, some of our clients were just sitting in one of our virtual lobbies, talking to each using their 3D avatars. Then a prospect walked by and joined their conversation. This led to a lucrative deal for their company.

Clients have previously inquired about obtaining recordings of their events. While we can certainly provide recordings, the question arises: From whose perspective should they be captured? In a dynamic virtual environment that allows users to move from a lounge to an exhibition hall to a dance club, selecting which part of the journey to document can be challenging. If a flat recording can fully replicate





the experience of attending the event, it's likely that the event lacked engagement in the first place.

**→ How beneficial is your platform for companies that face difficulties meeting in person?**

In the postpandemic era, the growth of remote work has made companies more aware that employees may not be bonding or experiencing a sense of belonging within their teams. I call this “un-remote” working, which aims to make employees feel less isolated and more connected to their colleagues, despite the physical distance. As companies increasingly recognize the value of fostering a strong corporate



We have two main types of customers: those using the platform for events, and those using it year-round as a permanent metaverse for learning, training, etc., which they can revisit over and over again.

**- DANNY STEFANIC**

culture and cohesive teams, they are turning to platforms like Hyperspace to achieve these goals.

**→ What's one event you're particularly proud of?**

We hosted Shell's international awards ceremony on our platform, where over 1,000 attendees entered the metaverse in one day. More recently, Shell hosted an event where over 10,000 attendees joined in from across the globe. It was amazing to witness people joining from every corner of the world, and the events were a real success. I can't think of another way you could provide that level of accessibility to so many people. It would be hideously expensive, not to mention inconvenient, for Shell to get every employee into one live space. We actually helped them build a digital twin of one of their facilities to replicate a real-world gathering.

**→ So clients can customize their events?**

Planned events are infinitely customizable—more so than a live event, in fact. If you think of the Adobe set of tools for creators, you can build just about any image you want. Likewise, our platform is a suite that clients can use to design anything. But to avoid the rigors of starting with a blank canvas, the platform comes packed with existing content: a catalog of worlds like gardens,





auditoriums, and wellness retreats. We also have a studio that can capture real-world environments so clients can invite guests into a familiar space.

There are also over one billion possible avatar combinations, including job roles like construction workers and medical professionals. We offer a 3D search engine full of trade show booths, furniture, decorations, and more. But Hyperspace is built on open standards, which means that you can bring content from elsewhere into our web page, whether it's PNGs, PDFs, links to your website, logos, contact forms, or music via MP3 files.

It's been amazing to see all the possibilities our platform offers and to watch clients get creative with these opportunities. We also understand that some clients need to host an event on a tight deadline, so we can quickly set one up and hand over a turnkey solution. This

way, they can easily launch their event as easily as just pressing a button.

At the end of the day, our main goal is to help clients build their own metaverses so they can get more value, increase revenue, and promote sustainability. With Hyperspace, we're striving to change the way organizations approach virtual events and collaboration, making it as simple and user-friendly as possible.

**→ How do you think the metaverse will impact the business world?**

I'm extremely excited about virtual reality and 3D as a media type. Before the internet, we already had images, audio, video, and words. These were our main media types. Then the internet came along, and we digitized this media—we moved it into another realm.

But there's another media type that is quite young: 3D. It's being used in gaming,

architecture, and all sorts of industries, and it's only becoming more pervasive. With our platform, we can now offer 3D capabilities in any web browser and provide a metaverse experience on any device.

We really are on the foothills of the next major media type, a new way to communicate and share experiences.

This is a pivotal point in history, in which we're making a new technology readily available—the sort of thing that future generations will take for granted. It doesn't matter where you are in this industry. Anyone who partakes in 3D technology or one of our platforms is a part of human history, the blossoming of a new communication medium. ■



**Consider innovative solutions to your clients' needs. How can new technology uncover opportunities or results?**



For more info, go to [hyperspace.mv](https://hyperspace.mv)



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# SCALING YOUR SMALL BUSINESS

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**Bill Haskell**, chief executive officer of Innventure, is an expert at scaling technology companies in sectors like renewable energy, health care, and agriculture. Here he shares his advice for how to grow your small business and help it reach its full potential.

INTERVIEW WITH **BILL HASKELL**  
WRITTEN BY **LAUREN KIM**  
PHOTOS COURTESY OF **BILL HASKELL**



## WHAT IS INNVENTURE'S PROCESS FOR CREATING COMPANIES THAT SCALE?

At Innventure, scaling begins when a company has validated that the product or solution has achieved commercial acceptance—when customers are actively buying. To mitigate the risk, we have serial CEOs who have experience in growing start-ups, so we avoid the pitfalls often attributed to first-time entrepreneurs. Once we reach critical mass, we then hire a dedicated executive team with domain knowledge to scale the company to the next level.

## WHAT SHOULD COMPANIES THAT ARE LOOKING TO SCALE DO FIRST?

Before you decide to scale your business, make sure your customers have demonstrated a willingness to buy your services or products. Then develop a business model that shows the potential costs, profit margins, and so forth of scaling. You need to research every angle before you focus on growth—you can't just start getting new customers and hope it all goes well. For example, before McDonald's builds a restaurant in a new location, it looks into how many people drive by, how much of their income those individuals spend, and

what their socioeconomic status is. The company knows all this before it even digs up its first shovelful of dirt.

## HOW CAN A COMPANY READY ITSELF TO SCALE?

You need to position your organization for growth by hiring the best talent and putting them in the right positions. I've seen a lot of companies that start to become successful and then ultimately fail because they can't accommodate the growth and keep up with demand. If you can't handle your growth and deliver to your customers in a timely fashion, they may leave for a competitor. To prevent this, you need to grow and improve your workforce, though you don't have to hire a full-time staff. You can bring in the necessary talent part-time, or you can even outsource.

## IS IT ALWAYS NECESSARY TO BRING IN NEW TALENT TO SCALE?

It depends a lot on your skills, goals, and type of business. Some owner-operators can carry their business on their own and make it profitable enough to support their needs. There are only a few individuals in history who have taken their companies from just a concept to a very large scale as CEO: Bill Gates, Michael



Dell, and Elon Musk, to name a few. Some people are very adept at the conception stage of a business and others at the execution phase, but, in general, few are good at both.

So if you hope to sell millions of dollars' worth of your product, you should consider bringing in skilled experts instead of working to acquire all the necessary proficiencies yourself. Individuals who try to work on their weaknesses tend to be less successful than those who focus on improving their strengths. For example, Sam Walton, who first started out with a dime store in Arkansas and went on to create Walmart, was able to do so in part because he hired people who had skills he lacked.

## WHAT TYPE OF TALENT SHOULD A SCALING BUSINESS BRING IN?

First, assess your own abilities. If you're primarily good at the beginning stage of running a company, you may want to hire workers skilled at honing your product, determining what your customers want, and tailoring your product to the market.

You should also consider bringing in people who've helped scale a business before. Most first-time



entrepreneurs don't have this type of experience, and it can lead to various mistakes and failures. Seeking out experts who understand the nuances of your specific industry is another way to better avoid potential pitfalls.

### **WHAT ARE OTHER IMPORTANT CONSIDERATIONS WHEN IT COMES TO SCALING?**

You need to make sure you have access to the capital you'll need to scale. Growth generally requires a *lot* of money, so you must be able to convince people to invest in your business. You can also turn to the Small Business Administration and lenders who concentrate on helping small businesses.

### **IS IT POSSIBLE TO SCALE WITHOUT SIGNIFICANTLY INCREASING EXPENSES?**

Yes. There are economies of scale. You have certain fixed costs, such as your rent and your overhead, and you'll get more profit if you can sell more without increasing those. Your ability to do this and how you go about it depends on the product you sell. For instance, if you own a software business, it may be easier and less expensive to scale—you can do so almost infinitely because the cost of delivering your product may



**“ EVERY COMPANY SHOULD HAVE KPIS, INCLUDING GROSS MARGINS, THE NUMBER OF CUSTOMER INCREASES OVER TIME, SALES-PRICE CHANGES, AND CASH NEEDS.**

**- BILL HASKELL**

be relatively low, no matter if you sell ten or one hundred copies. Almost every sale can be pure profit. But if you're an airline, you'll have much higher costs, such as for fuel, pilots, and flight attendants, that you'll have to pay whether there is just one or three hundred passengers on a flight. You'll also have lots of contingencies to manage in order to scale successfully. If you add routes, for example, you'll make more money if you can keep your planes full; it'll also be very important to fly where the demand is high.

### **WHEN IS IT BEST TO START SCALING?**

Only after you've proven that you have customers who want to buy what you have to sell. You don't want to spend a lot of money and put infrastructure in place only to find out that your product isn't as appealing as you thought. Once you've shown that your business model works and that people will pay the price you need to charge for your products or services so you can make a profit, that's when scaling begins.

### **WHAT ELSE SHOULD INFLUENCE A DECISION TO SCALE?**

Every company should have KPIs, including gross margins, the number of customer increases over time, sales-price changes, and cash needs. You'll want to track any factors that may affect the health of your business, such as in an Excel spreadsheet, and monitor them so you can spot problems early enough to fix them. For example, Walmart, which has tens of thousands of stores and trucks on the road around the world, balances its books every day. The financials from every single Walmart store flow into a central database, so the company knows exactly how much profit it makes each and every day. Its metrics are unbelievable. ■

For more info, visit [innventure.com](http://innventure.com)



**Before looking to scale your business, examine its well-being and take steps to make any necessary fixes or improvements.**

# How to Have a Successful Seasonal Business

With the holidays here, now is an ideal time to examine what it takes to make a seasonal business thrive. BY MATTHEW BRADY

**R**UNNING A business is like going on a road trip. Every entrepreneur would love to reach their desired destination as quickly as possible, but they also value efficiency so they don't increase their burn rate and understand the importance of following a carefully thought-out road map (i.e., business plan). And, of course, they'll pass landmarks such as year-over-year growth along the way—encouraging signs that, when passed, assure everyone taking this ride that it's going in the right direction.

However, the road can be a bit bumpier if you own a seasonal or holiday-based business. Such a trek is fraught with greater uncertainty and involves more hills and valleys. It sometimes feels like getting stuck in traffic for long spells and then finding yourself on



a stretch of open highway rushing to make up time, hoping you don't arrive at your destination late.

That said, leading a season-based business can also be exhilarating and rewarding. As long as you understand and accept the unique challenges going in and are savvy and strategic with your business decisions, it can turn into the ride of your life.

## → Potential obstacles

As is the case with any business venture, you're going to face both headwinds and tailwinds. However, a seasonal business entrepreneur that can anticipate and manage the former well is bound to find success.

## Off-seasons

The stress caused by your business having achingly slow traffic or even being closed for months at a time—and then having to work at it seemingly 24/7 during peak periods—is

real. This aspect of such a business model can be daunting, so you need to have the stomach for it, along with a solid plan that will get you through the down times.

## Inconsistent cash flow and revenue

It's typically easier to run a business when somewhat predictable parameters are part of the equation. This isn't the norm, however, for seasonal businesses, which can fluctuate between booms and busts throughout the year. As a result, you must be spot-on with forecasting factors like cash flow and revenue, especially for the peak season.

## Weather

Since the weather is out of your control, your fortunes are often at the mercy of Mother Nature. For example, farmers and landscapers can face droughts, and ski resorts can have seasons ruined by little snow. "The weather can be your best friend or



worst enemy,” says Brent Christensen, founder of the winter-based business Ice Castles. “One year, we had to close a location because wind chills were negative 40 degrees. Then, within about a week, we shut down that same location because it was too warm.”

→ **Upsides to embrace**

At times, it may seem like the wins are few and far between for a seasonal business—or at least confined to certain times of the year. In reality, the upsides arguably outnumber the challenges.

**Off-seasons**

Yes, this is a double-edged sword. Most business owners wish they had more time in a day, a week, a quarter, and a year to do everything necessary to run a successful company: manage cash flow, evaluate processes, make forecasts, set goals, etc. One distinct advantage of being seasonal is that you have ample time to strategize



One year, we had to close a location because wind chills were negative 40 degrees. Then, within about a week, we shut down that same location because it was too warm.”

— Brent Christensen, founder of the winter-based business Ice Castles

and be intentional with every decision about your business. Christensen notes that his teams start assembling their structures in October, but the planning of them, from logistics to

brainstorming how to top their previous year’s offerings, is year-round.

**Seasonal employees**

Hiring seasonal employees is usually a win-win for all involved. Temporary

workers brought in to handle the crush can make more money when they need it the most: during the holidays or summertime. And establishing relationships with these team members helps to ensure they come back each year, removing the burden of having to find reliable workers during your busiest times.

**Targeted client communication**

A great aspect of being a season-based business is that you can market to current and prospective customers ahead of time. Say, for example, that your landscaping company typically starts prepping clients’ lawns in March. You could begin marketing in February with a post-football mailing, which would allow for multiple follow-ups and thus a better chance of closing deals.

→ **Strategies for success**

Winning at seasonality is eminently achievable with the right mindset

and tactics. However, you know your business, your team, and your clients best, so make sure to customize the methods that follow as necessary.

**Offer monthly options**

Want to make your season-based business’s cash flow somewhat more traditional? Consider offering monthly payment plans for your services. If you own a landscaping service, for instance, you can charge \$300 for the entire season of lawn care or \$50 a month over six months. The latter option can be a win for you and the customer, as you both can spread out your exchange of money.

**Be disciplined**

The period of time after the season closes can seem like a windfall—think of holiday profits tabulated in January—but you need to be wise about how you approach it. If you met or exceeded projections for your busy season, ask yourself how that extra revenue could be best used over the next several months, whether toward infrastructure, marketing, or staffing increases. Much like farmers have long done, you need to reap your harvest so it can last until the next one.





### **Manage your stock wisely**

Much of your focus will likely be on trying to pinpoint how much product you'll need to satisfy demand during peak season—having high demand with not enough to sell is a business owner's ultimate nightmare, especially a seasonal one. But this mindset also holds true after the season is done. You should have a forecast and a plan for any inventory left over at the end of your peak; for example, for winter-based businesses, there's always the postholiday shopping blitz to take advantage of.

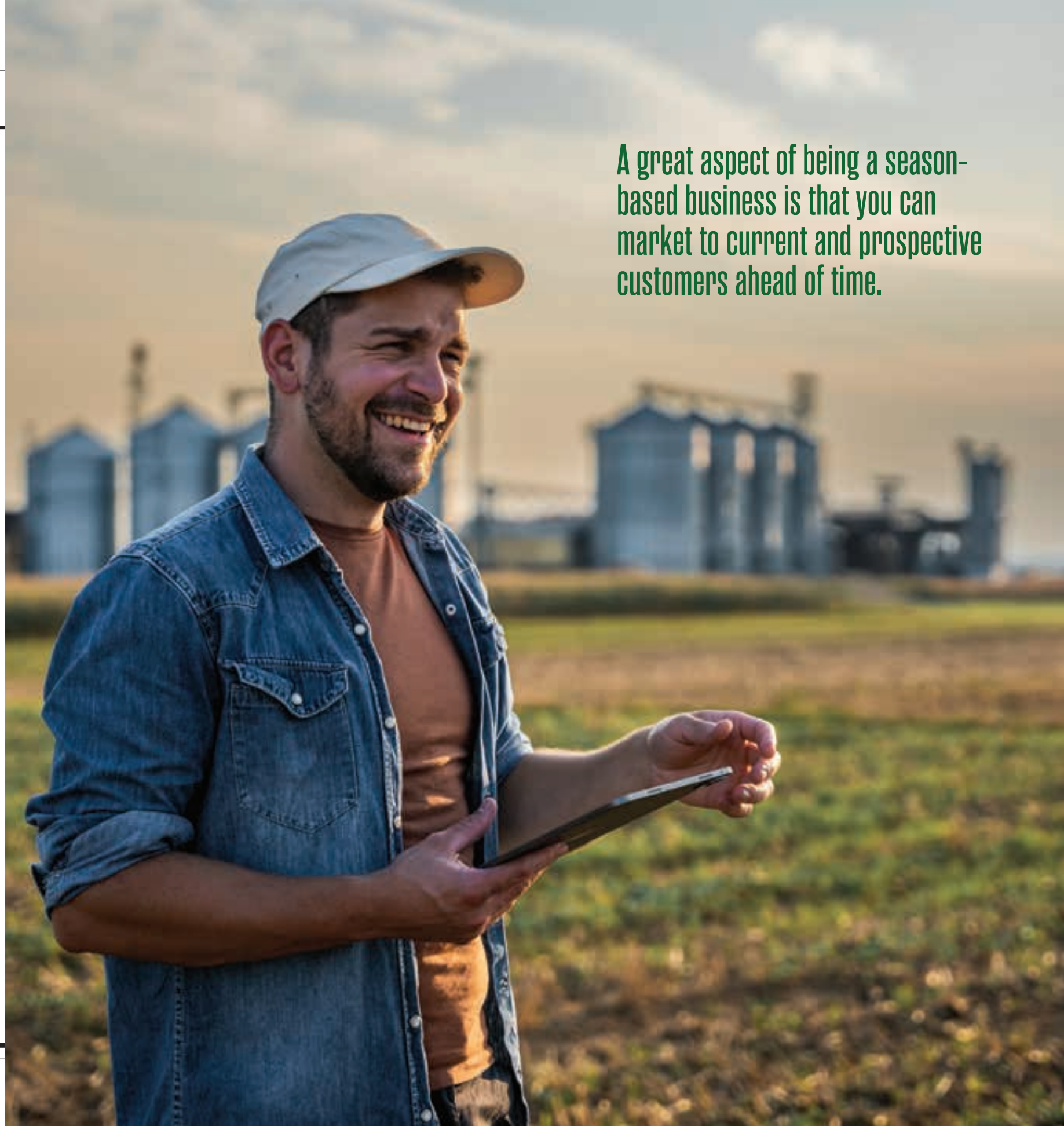
### **Diversify**

It's not necessarily wise to put all your eggs in one seasonal basket, so consider ways you could extend your outreach beyond what you're known for. For instance, business certainly picks up for fruitcake manufacturers around the holiday season, but many offer other food items besides their signature treats to keep interest—and sales—higher throughout the year. Similarly, if you run a landscaping business in a four-season climate, you could put your equipment to use during the off-season by offering snow-removal services.

### **Stay top of mind**

See your slower months as an opportunity to foster your relationships with customers. Send a weekly or monthly newsletter providing industry-specific tips along with direct mail or emails during the months leading up to your busy seasons. This will

**A great aspect of being a season-based business is that you can market to current and prospective customers ahead of time.**



remind customers and potential customers that you're the one to turn to and push them to act now before the rush hits. You could also consider offering early-bird discount mailers they'll want to hold on to.

### **Find a mentor**

Perhaps the simplest path to seasonal business success is by learning from someone who has already done it. If you're just starting out, try to speak to someone in your industry (preferably outside your service area to avoid competitors) or your parent company to glean advice. You could also join an online group of your peers to discuss the ups and downs that come with owning this type of company. You'll not only gain sage advice but also feel like you're part of a community of like-minded people with the same goal—providing the best business possible.

Running a seasonal business is not for the faint of heart, but it can also be an exciting challenge for any entrepreneur. So if your true passion is for a season-based industry, don't hesitate to go for it. You can be wildly successful if you're willing to take the ride. ■

**Take  
Action**

**Determine what steps you can take to help ensure that your seasonable business thrives year-round.**



# Coaching Women to Succeed

Sherri Somers-Bell is a well-known financial coach and life insurance professional who teaches women in financial fields to succeed in their careers without sacrificing personal happiness. Here she shares her secrets and how she has achieved her own success.

INTERVIEW WITH **SHERRI SOMERS-BELL**  
WRITTEN BY **LAUREN KIM**  
PHOTOS COURTESY OF **SHERRI SOMERS-BELL**





➤ **YOU BEGAN YOUR CAREER IN LAW ENFORCEMENT. WHAT DID SOME OF YOUR DUTIES ENTAIL?**

I was in law enforcement for ten years, during which I was a corporal in a sheriff's office, worked in corrections, and represented the sheriff at various speaking events. I also created a curriculum for inmates. I figured if could teach them how to start their own businesses or how to get their GED, they would have a better chance at success once they got out. That reentry program got national recognition, and, in 2016, I was invited to the White House to share my ideas on how to lower recidivism rates.

➤ **WHAT SPURRED YOU TO CHANGE CAREERS?**

When my son was young, he was really sick. Every time he was ill, I'd get a call from his school to pick him up. Then

one day he passed out from an asthma attack, and I needed to be home with him. So even though it was a difficult choice, I decided to leave my law enforcement career to find one that would give me the freedom to be with him whenever he needed me. I realized that it would be hard to find such a job, though, and knew that the only way to get the flexibility I needed was to create my own.

➤ **HOW DID YOU TRANSITION INTO THE INSURANCE AND COACHING FIELDS?**

As a result of my divorce, I found myself with a lot less income and had to give up my house and move my son and me into a smaller home—an eight-hundred-square-foot apartment. I have an MBA, so I could have landed a corporate job. But, again, I knew it wouldn't have given me the time I needed for my son. Luckily, like



**I don't recommend practicing door knocking, cold-calling, or buying leads. That's not who women are. They do better when they make selling about building relationships and creating value.**

**- SHERRI SOMERS-BELL**



many people who leave a job, when I left my law enforcement position, I had benefits I could take with me, including life insurance with cash value in it. I was able to use that to pay off some of my debts.

I also started going live on social media to share my personal story

along with the strategies I used as a divorced, single mother to get out of debt. I was doing this every day, and it was creating a lot of interest—and, eventually, income too. A life insurance agency reached out and asked me to teach their staff my marketing techniques, and I started working as a business coach for

individuals. After a while, I became a life coach as well because I realized I also needed to teach my clients how to master their thoughts so they could take action—just as I taught the inmates. Now, I'm the CEO of my own company, Sherri Somers Unlimited Services.



Later on, I got my license as an insurance agent and started showing other agents how they too can move from being an agent to a CEO. Now I focus on helping women in finance succeed—whether they're insurance or real estate agents or financial professionals. I teach them how to build their own tribe or community and improve their thinking so they can propel themselves toward success.

**> WHAT'S AN IMPORTANT LESSON YOU TEACH TO THE WOMEN YOU COACH?**

I always emphasize that they should take the time to learn how to generate leads without sacrificing family time. I remember once going to my son's soccer game but then feeling like I had to leave so I could write a life insurance policy. I kept saying to myself, "Why am I doing this on a Saturday? That's family time." Too often I missed time with my son because I wanted to make sales—and I lost opportunities to make valuable memories. It's important to know that you can achieve your professional goals while still prioritizing your family.

**> HOW CAN WOMEN GET AHEAD AND STILL HAVE TIME FOR THEIR FAMILIES?**

First, they should lose their superwomen capes because success isn't just about working hard; it's also about working

*smart*. They don't need to do it all on their own. They must learn how to prioritize tasks, delegating ones like bookkeeping, scheduling, and administrative work. It's important to work on achieving balance. Women don't have to always work long hours or cancel plans with friends and family to achieve success—they are more likely to burn out doing that.

**> WHAT'S THE MOST EFFECTIVE WAY FOR WOMEN TO FIND SUCCESS AS SALES PROFESSIONALS?**

I don't recommend practicing door knocking, cold-calling, or buying leads. That's not who women are. They do better when they make selling about building relationships and creating value; it's this heart-centered sales approach that's often the most effective for earning money. But even though my focus is mostly on assisting women who are in finance, my model can work for anyone.

**> WHAT DOES IT MEAN TO CREATE VALUE?**

It's all about connecting with clients on a more meaningful level and understanding their needs. Value shouldn't be tied to an outcome like making a commission. For example, if I talk to someone about life insurance but only focus on getting the sale, I might miss how I can truly help them because I'm not paying attention.



It's important to shift your perspective from the business outcome to how you can help an individual. Even if you can't do anything for them, you can find somebody who can. The point is being happy you were able to serve them, even if a sale wasn't made.

It's this sort of belief system that I'm coaching other financial professionals to embrace. When you can authentically build a community of customers, they'll want to buy what you have to sell and will believe in what you're doing. I tell all my clients to stop chasing commissions and start creating mission. ■



**Assess your business and life to determine how you can make it more relationship- and community-centered.**



For more info, visit [itssherri.com](http://itssherri.com)

# The Significance of Customer Reviews

Customer reviews play an important role in the success of any company, making it important for business owners and entrepreneurs alike to create strategies for increasing their online engagement. **BY ALLISON GOMES**

**T HINK ABOUT** the last time you looked at an online review. Maybe you were trying to decide on a movie or book, checking the ratings for a new restaurant, or considering different construction companies. Did what you see online help you make your choice? If the answer is yes, then you're not alone; most people use reviews to inform their purchasing decisions. In fact, 88 percent of consumers consult online reviews before they buy from a local business. That's because we tend to trust online reviews to give us unbiased and honest opinions of the value that a

product or service can bring into our lives. Given how heavily customers rely on online reviews and testimonials, every leader should prioritize increasing the number of positive ones for their business. But this won't happen overnight—instead, you'll have to find ways to actively seek them out.

➤ **A brief history**  
Though it may be hard to imagine a time before the

existence of online reviews, they only began appearing in 1999. These were mostly limited to specific retailer sites, such as eBay, at first, but they soon shifted to others like Epinions and Deja. Consumers could post reviews of products and companies that other potential customers could then use to inform their own decisions. This review process quickly grew in popularity, which led to larger organizations taking notice. In 2002, Google

*Given how heavily customers rely on online reviews and testimonials, every leader should prioritize increasing the number of positive ones for their business.*



acquired Deja and changed the name to Google Groups. And in 2003, DealTime took over Epinions but was later acquired by eBay in 2005.

Following the success of these platforms, other sites, including RateItAll, Yellow Pages, and CitySearch, entered the sphere, increasing the amount of information that consumers could consider before deciding to support a local business. As more sites appeared and the amount of data available grew, reviews became an intrinsic part of the customer experience.

Today, there are five major platforms for customer reviews—Google, Yelp, Tripadvisor, Amazon, and Facebook—and there's more information available to people than ever before. (Yelp alone has over 265 million reviews.) These sites all utilize a five-star rating system that allows consumers to assess businesses for themselves. And it's been found that their standards are pretty high: people typically opt for products or services with at least a four-star rating. If others have had satisfactory experiences with the company, they can feel confident that they will as well.

➤ **Why reviews are important**  
When consumers peruse online reviews and testimonials, they are looking for clear evidence that a product or service is worth spending



their money on. In addition to seeing how other people have used it and what they generally thought of it, they want to learn more about the business's customer service and compare them with a competitor. And reading reviews is the best way to determine all of that.

As your business gains more reviews, your brand's reach and visibility will subsequently increase. Potential customers will take notice if you have twenty, thirty, or even more five-star reviews. In fact, one study showed that products with just five reviews instead of zero are 270 percent more likely to sell. Search engines also tend to favor businesses with large numbers of positive ratings and feedback, allowing more people to discover your organization if you're one of them.

Such positivity surrounding your company can also help develop your brand's credibility by increasing trust in your product or service and showing potential customers that you know what you're doing and will do all that you can to provide a satisfactory experience. After all, you're likely boasting about your expertise in your marketing—and a high level of positive customer feedback will validate those claims.

#### ➤ **How to get more reviews**

You may think it's challenging to obtain reviews, but it really comes down to one

thing: requesting them. The reality is, unless their experience is horrible, many consumers don't even think about leaving a review until they're asked for feedback. So after you work with someone or sell them your product, don't hesitate to ask them to review the items or services they received. Not every client will do it, but you can make the process easy for those who choose to by linking to your business's Google, Facebook, or Yelp page on your website or in an email that automatically goes out to customers.

One way to really grow your reviews is through incentivization. Small discounts on future purchases or gift cards to other local businesses are great examples. It's important to note, however, that you're not trying to incentivize positive reviews only. By encouraging customers to review your business, you're seeking honest feedback—which is what other potential customers want to read the most.

Customer reviews play a significant role in the overall success of your business, helping it grow and creating more sales. If you're not already seeking them out, make sure to put together a plan to ask for them in the future. You'll also want to get in the habit of responding to the feedback you receive, further proving to others that your business is worth investing in. ■



**Examine your organization's current review strategies and find ways in which you can encourage more customers to leave feedback on your Google, Yelp, Facebook, and other review sites.**



# The King of Capital

Brad Blazar—speaker, real estate investor, author, and leading capital raiser—discusses the life-changing power of using other people’s money to achieve financial freedom.

INTERVIEW WITH **BRAD BLAZAR**  
WRITTEN BY **MATTHEW BRADY**  
PHOTOS COURTESY OF **BRAD BLAZAR**

## What was your upbringing like?

I grew up in a traditional middle-class family like many people. But I soon realized that the path I was on was one mostly driven by my parents’ expectations—not necessarily what I wanted to do in life. For many people, you graduate from high school and college and the expectations are you hopefully get a good job, enter a career, put some money away in a 401(k), and have a comfortable retirement.

## You dropped out of college and returned many years later to pursue your financial interests. Why?

School largely does not teach us how to go out and create wealth or true financial freedom. Most people around the world are exchanging time for money—we call that a job. You show up to work every day and work your forty-hour week. In return, you get paid. I dropped out to invest and bet on myself. By the age of twenty-three, I launched my own oil company raising capital from high-net-worth investors all across the United States.





### Who or what influenced you to go down the capital path?

Much like Robert Kiyosaki writes about in his book *Rich Dad Poor Dad*, I was fortunate to have a wealthy uncle in my life. He was somebody I looked up to since his life was very different than ours. When I was around eight years old, he told me, “Brad, if you can find a problem that lots of people have and create a solution for it, that’ll enable you to create financial success. Money exchanges hands when problems are solved.”

That wisdom didn’t sink in until many years later, though, when I saw Steve Harvey tell his TV audience that everyone has a unique talent and that if you can find it and deliver it to the world in a way that positively impacts people, it’ll be magical for them and you.

It dawned on me that for pretty much my entire professional career, from my early twenties

to my fifties, my talent was raising capital from high-net-worth investors. I realized that I could use that talent to coach and mentor others on how to attract and talk to potential investors and ultimately help their dreams become reality.

So I launched Capital School, largely as a coaching and mentoring program. And the rest is history. It’s gone ballistic! We currently work with students in seventeen countries around the world, and it’s changing people’s lives. That’s very gratifying.



**What I like to teach people is twofold: how to begin turning your liabilities into assets and how to own businesses, real estate, or assets that generate passive income.**

- BRAD BLAZAR

### You focus heavily on belief. Would you discuss what kind of impact that can have on someone?

Absolutely. I call it the Art of Beliefology™; that phrase and the word *beliefology* are actually trademarked. It means that we are largely driven by our beliefs, which are supported by our underlying habits. The problem is that habits take time to become ingrained. Psychologists have found that you have to maintain a habit for roughly sixty days for it to become part of your life. That’s why so many people start diets

or fitness routines as New Year’s resolutions but then quickly fall off the bus. But if you focus on sustaining good habits, they will reinforce a new belief system that will help you create a more positive and successful reality.

I have a great story about beliefology. I was coaching a gentleman who was 480 pounds. He wanted to be a coach, but it was not going well. I recommended that he work on himself first and prodded him to walk the next morning, promising him that if he was willing to move, he would lose the weight. Six weeks later, he had worked himself up to running three miles a day. After he had lost 180 pounds, he told me he saw himself differently: as an athlete. Today, he’s 220 pounds, and he’s rock solid. His habits supported his new belief system.

### What are your thoughts on passive income?

There are certain industries out there—

insurance and real estate, for example—where you’re getting paid *next* year for the work you’re doing this year because you’re establishing policies and making connections that produce positive cash flow. Every year, that number is hopefully compounding on itself, giving you passive income.

What I like to teach people is twofold: how to begin turning your liabilities into assets and how to own businesses, real estate, or assets that generate passive income. Most people have a mindset that they must amass millions of dollars to be financially free, but nothing could be further from the truth. You just need to get to a point where your passive income meets or exceeds your living expenses. Once you do *that*, you’ll really feel financially free—and you can spend more time increasing that passive income and reinvesting it to make more. A big part of our Capital School



curriculum is showing people how they can get to that point much faster and go much further by using other people's money: attracting investors and raising capital.

### What's the biggest mistake people make when trying to raise capital?

People understand that others are not going to invest until they trust them, but they don't invest enough time in building trust. Imagine, for example, that you need to raise capital for a real estate deal and you have a conversation with a potential investor. Typically, in the first or second conversation, you'll start selling the opportunity. However, once you try to get them to invest, they'll suddenly become very evasive and give you every excuse for why they don't want to move forward. It's not that it's a bad deal—they likely just don't trust you enough to partner with you.



I always stress that the best way to increase your chances of getting people to commit capital is to slow down the process.

This isn't a sprint; it's a marathon. At the end of the day, you're selling them on *you*. So allow them to really get to

know and trust you, and validate that this trust exists before you present the opportunity. If you do it too early, you're basically like a hamster on a treadmill: you're creating all this activity for yourself that is ultimately leading nowhere.

### Is it vital to put yourself in an investor's shoes?

One hundred percent. If you can uncover what that person is looking for at this point in their life, you'll be much more successful because you'll be able to fit the investment with their need. And if there's a match, there's a much greater chance that they'll move forward and write a check for you.

### Can raising capital be affected by major world events like a pandemic or a recession, or is it bulletproof?

In my experience, it doesn't really get impacted. Personally, I just block out

the noise and focus on my goals no matter what. Most people who have any degree of savings or wealth realize that money is a tool. The purpose of having it is to see it grow, so they are always looking for solid investment opportunities. For example, if the stock market's pulling back or there's news of an approaching bear market, different investment choices arise for potential investors even as others disappear. So I don't buy into the mindset that one time or another might be better to attract capital. If you're good at it and you're persistent, it's *always* a good time.

### What do you find most enjoyable about what you do?

Seeing others have success. There are so many people out there who want to invest in real estate but don't have the knowledge or resources to do it themselves. I get the

most gratification from helping them see their money grow, have more financial freedom, and, most importantly, achieve longtime goals so they can change their lives and their families' lives.

### Ultimately, why is raising capital a wise venture for anyone?

If you're at a point in life where you want more wealth, then learning how to attract and raise capital will help you go much further and faster than doing it alone. Most people have limited resources, which discourages them from going for it—but they often look back with regret later about not taking action. The key is to just get started.

Let's say within twelve months, you find four people to each give you \$50,000 and then buy, rehab, and renovate two properties and flip

them. There might be a \$60,000–\$80,000 profit apiece in most markets, which is very attainable. After you pay back the investors' capital and split that profit with them, you'd still have an extra \$60,000–\$80,000 in your pocket. That's life-changing money for a lot of people. It could allow them to get out of debt or put a little cushion of capital in the bank.

It could also set you in motion to hopefully do the same or greater the next year. And if you continue that process, you'll put yourself on a path to change your life by creating much more abundance and a better financial future. It's all about showing up, improving yourself every day, and having the courage to take that first step and believe that you can do it. Helping people do that is inspiring. ■



For more info, visit [bradblazar.com](http://bradblazar.com)



# Strategize a Sales Play-by-Play

A sales playbook can help you tackle any prospect interaction to drive positive results across your team. BY **LUKE ACREE**

**S**ELLING WITHOUT a guide is like driving to an unknown destination without a map. If you want to accelerate your progress toward higher conversion rates, you need a framework that guides your sales techniques clearly and helps you track your results. This is the value of a sales playbook for any business in any industry.

## What is a sales playbook?

To put it simply, it's a comprehensive document full of useful information on turning leads into sales and detailed strategies for

optimizing team performance. Your goal when compiling a playbook for your organization is to identify effective sales techniques and train your staff to use them to help ensure positive results.

According to a LinkedIn study, sales professionals have a turnover rate of 10.8 percent, so, depending on the size of your staff, you could be onboarding new team members often. An effective sales playbook not only acts as a reference guide as you train these new hires but also makes it easy for your current staff to polish their skills. Build



The best way to build a script as both a training document and an ongoing reference guide is to identify, record, and transcribe successful sales.

a comprehensive one that's packed with productive elements, and your team will have the tools they need to close more sales.

## Lay out the steps to making a sale

The central component of your sales playbook should be a step-by-step guide that helps your team direct leads through the sales funnel—from a company gaining awareness of

your brand to a faithful customer who refers others to your business. The best way to make this happen is to write a script that covers the following essential steps.

**1. INTRODUCTION:** Your team should begin every sale by greeting a new lead or returning customer and building rapport with them to create a positive

impression of your brand. This is a great place in the process to drop in proven lines or quips courtesy of your more outgoing team members—the ones who can get a smile or a laugh out of potential buyers.

**2. DISCOVERY:** Once your team connects with a prospect, they need to identify the potential



client's needs. What can your products or services do for them? Note in the script the importance of listening well at this stage, and include a list of key phrases your team can hook onto, such as "I'm a little short on cash" or "My current agent just isn't working out anymore."

**3. PRESENTATION:** This is your team's elevator pitch—their chance to introduce what you sell. Each member should offer specific details and be prepared to answer

questions about pricing, specs, etc. This should be the most precisely worded and adhered-to part of the sales script.

**4. VALUE PROPOSITION:** At this stage, your salespeople should break down the main advantages of what you have to offer, what makes it better than competitors' offerings, and how it addresses the prospect's core needs. This section of your script is essential for helping new hires and seasoned sales pros alike pitch

what you sell accurately—and with attractive language.

**5. OVERCOME OBJECTIONS:**

Few sales go perfectly, and your team will likely face frequent resistance. This portion of the playbook prepares them for any initial rejection, then gives them suggested phrases they can use to regain a prospect's interest and redirect them toward closing.

**6. CLOSE:** Here is where your sales team takes the leap to ask for an order. The phrasing in your script can help the team navigate even the most difficult prospects from interest to agreement to sale to payment.

**7. REFERRAL REQUEST:** Whether or not a team member has earned someone's business, they should still request that the prospect refers their friends and family to them. Make sure to list strategies for navigating this step gracefully, and your team can turn every lead into additional leads.

The best way to build a script as both a training document and an ongoing reference guide is to identify, record, and transcribe successful

sales. Consider working with sales leadership and top performers to compile high-converting conversation templates for different types of leads. Additionally, hold regular meetings to practice sale cadences and "rehearse" the script. That way, you can ensure everyone on your sales team is following the same game plan.

**Fill out your playbook**

Besides an effective script, a comprehensive sales playbook should have these additional key components.

**Lead sources**

Assess where your leads come from. Whether you get prospects from cold calls, hits on your website, or direct referrals from professional contacts, documenting these different sources has a number of benefits. First, you can identify just how many ways leads approach your business. Second, you can write different variations of the sales script for each lead type. And last, you can set standards for what your conversion rates for leads should be—and track your success.

**The ideal client**

Use your sales playbook to help establish which clientele you want

to target. Start by determining who you currently market your products or services to, what segments of the general public would be most interested in your organization, and which groups are most likely to reach out to you first. Then draw up your ideal client's demographic data and personality traits. Do your lead sources match this ideal client?

**Reference materials**

When a prospect asks a question like "Where is your product made?" your sales staff needs to have an answer ready. Devote a tab in your sales playbook to information on your products and services, including product dimensions, materials, and consumer review data. Service-based industries can also use this section to track data like success rates. For example, "On average, we save our clients 20 percent on their insurance premiums."

**Systems**

Your team needs a guide to the various systems it utilizes daily, including your CRM, dialer, productivity apps, and social media platforms. Detail best practices alongside some dos and don'ts so your team stays compliant. These sections can even include training documents in case a certain process slips their minds, helping them find answers fast.

**Marketing materials**

It's essential to vary your marketing, such as emails, text messages, print materials, and webinars, depending on the lead type and whether the lead is hot, cold, or warm. Similarly, your team should vary their communications for inbound leads and outbound responses, and content should vary for automated and personalized content. Your sales playbook should offer a rubric for segmenting these materials by their intended use.

**It's essential to vary your marketing, such as emails, text messages, print materials, and webinars, depending on the lead type and whether the lead is hot, cold, or warm.**



### KPIs

Use your playbook to establish metrics for sales performance, quotas, and short- and long-term goals. You should also list different target numbers for calls, conversions, webinar bookings, and other performance standards, refreshing them with ongoing data so your team and leadership can track individual statistics. For extra motivation, place competitive elements on these pages like leaderboards and shout-outs to top performers.

### Edit your playbook

It's essential to think of your organization's sales playbook as a living document. Rather than in a binder with laminated pages, it should exist in your company's CRM. That way, your team can access it when necessary and easily click through tabs to get pertinent information or a technique refresher. Digitizing your playbook can also help you measure and update results often so you can track progress toward goals such as quarterly sales quotas where your whole team can see them.

Additionally, you need to be able to update your playbook in the event of changes like price increases. Having your sales team give a certain price tag to customers and then switch it up when payment is due is a huge betrayal of trust—and it can kill a potentially lucrative deal. Be sure to

update your CRM with any new notable stats, such as the results of a recent consumer poll, the number of five-star reviews on platforms like Google Maps, or a new awards designation.

### Customize your playbook

You can find several sales playbook templates online, but resist the urge to take the easy way out. Adapting someone else's strategy isn't going to maximize results for your business. Instead, you need to build your own playbook from the ground up. Your unique value proposition, audience, community, branding, and lead sources are part of what makes your company unique. Assess this info, and then start filling the pages of your playbook to build a solid framework for success—and see measurable increases in sales. ■



**About the author:** Luke Acree is an authority on leadership, a lead-generation specialist, and a referral expert who has helped more than 100,000 entrepreneurs and small businesses grow their companies. He hosts *Stay Paid*, a sales and marketing podcast, and has been featured in *Entrepreneur*, *Forbes*, and *Foundr.com*.

Take Action

Design a comprehensive playbook to empower your sales team and promote higher closing rates.

# recommendations & referrals

are the core of my business and always greatly appreciated.  
*Thank you for your continued support!*



### Stacey Shanner


The Shanner Group  
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## Front of Tear Out Card 2

# Create a Sales Playbook

Every organization should compile a handy sales playbook that catalogs effective sales techniques. Fill out yours using the elements on the back of this card to train your staff, build a solid framework for success, and boost your sales performance.





**Stacey Shanner**

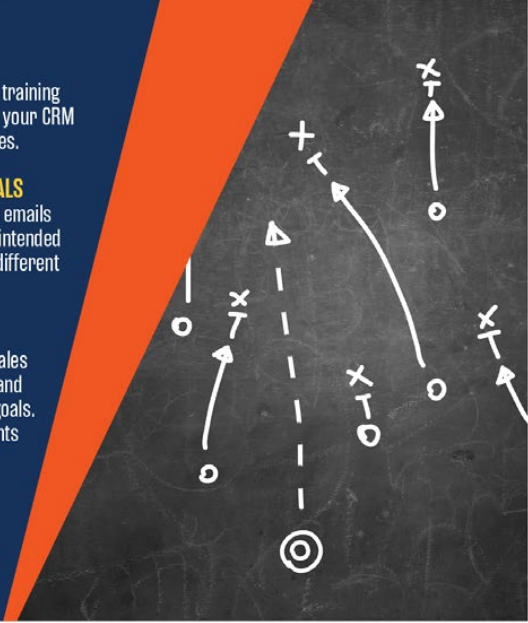
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## Back of Tear Out Card 2

- **SALES SCRIPT**  
Document key phrases for your sales team to use when communicating with prospects.
- **LEAD SOURCES**  
Identify where your leads come from so you can vary your script for each type and set conversion rate goals.
- **THE IDEAL CLIENT**  
Draw up your ideal client's demographic data and personality traits. Do your lead sources match this profile?
- **REFERENCE MATERIALS**  
Devote a tab to information on what you sell, such as product dimensions and reviews.

- **SYSTEMS**  
List best practices and training forms for systems like your CRM and social media profiles.
- **MARKETING MATERIALS**  
Segment materials like emails and webinars by their intended use, varying them for different lead types.
- **KPIs**  
Establish metrics for sales performance, quotas, and short- and long-term goals. Add competitive elements like shout-outs to top performers.



**Bill and Judy Smith**  
123 Main Street  
King of Prussia, PA 19406



*The Smith Family*  
Philadelphia

Stacey is the best of the best! Our family was very pleased with her services, especially Snowball, our little pup! She listened to all of our concerns, wants, needs, and dreams. Stacey is totally awesome! I will be sharing her information with everyone that I know.



*The Miller Family*  
Manayunk

Stacey was very patient with us, even though we were very picky. She knew how important it was for us to have a great experience and great service. We would definitely refer Stacey to all of our friends and family.



*The Austin Family*  
Manayunk

Stacey is truly a very impressive person. She works fast, efficiently, and effectively. Her services are top of the line and we were very satisfied with her work. We love Stacey!



*Stacey Shanner*

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