



## Building My Business Webinar: "Managed IT Lead Generation: Five Proven Prospecting Strategies to Ignite Your IT Sales"



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## Who is TAG?

- **Association of Managed Technology Services Providers (MTSPs)**
  - Founded in 1998
  - Managed IT, cloud-based technologies, cybersecurity, telecommunications, AV, video surveillance, access control, connectivity, and copiers/managed print
- **Members throughout the U.S. & Canada**
  - Presence in more than 136 marketplaces
  - \$800 million in products and services annually
  - Serving 780,000+ SMBs
  - Brain bank
  - Cooperative purchasing
- **TAG Members benefit from programs that drive...**
  - Profitability & Sales Growth
  - Recurring Revenue Streams



[www.TAGNational.com](http://www.TAGNational.com)

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## What Does TAG Do?

- Managed IT Sales Training
- Salesperson Coaching
- Marketing & Lead Generation Strategies
- Sales Appointment Setting
- Financial Analysis & Industry Benchmarking
- Managed IT Pricing Calculator
- Mergers & Acquisitions
- Professionally Led Peer Group Activity



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## What Does TAG Do?



- IT Operations Management
- Tech Stack Development and Deployment
- IT Technician Training and Development
- SLAs, Metrics and KPIs
- QBR Process
- Interview, Personality Analysis, & Aptitude Testing

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## Agenda

1. Elite Groups
2. Bird Dogs
3. Relationships within Chambers
4. Specialized programs for cause marketing i.e., Non-profits
5. TAG's Outreach Call Program

A photograph of a man in a suit pointing at a whiteboard while talking to a woman.

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## Elite Group

- What's the best possible appointment one can make?
- Referral
- Account that's moving
- Pending event



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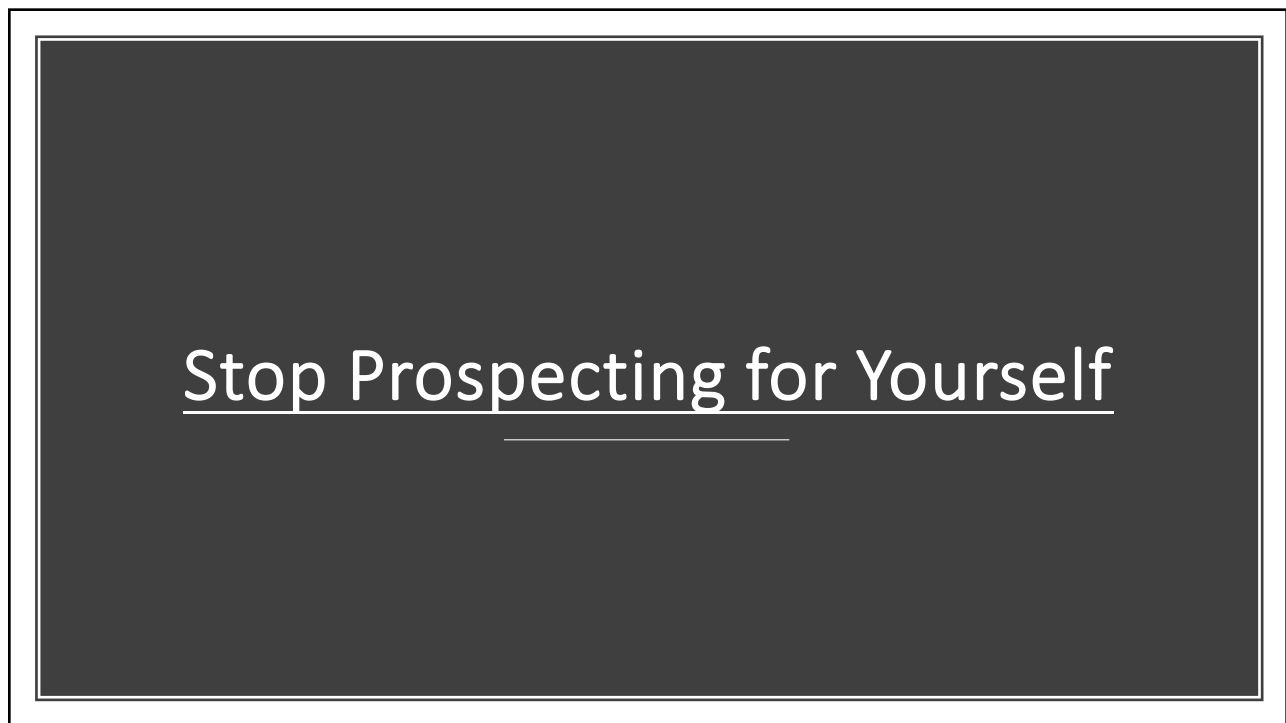
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## Potential Birddogs?

- CPAs
- Bankers
- Insurance Brokers
- Payroll
- Printers
- Web site design
- Security/Surveillance

**What about  
your  
customers?**



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## Building Your Group



Differentiate Yourself



Research



Get out of the office



Join a Non-profit or the Chamber of Commerce



STOP handing out business cards like they are candy



Look at your base

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## What do Birddogs do?

- Understand our criteria for prospecting
- Leverage their relationships
- Makes you aware of an opportunity
- Facilitates an introduction for you
- Helps you close the sale



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## Relationships within Chambers



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## Article Written for the BTA by TAG

<https://www.bta.org/assets/pdf/Jan24Stein/>

### Build Real B2B Relationships

Look to your chamber of commerce as a lead source

by: Dale Stein, Technology Assurance Group (TAG)

One day, after months spent trying to make it as an actor in New York City, a young man finally landed his big theatrical debut. He arrived in Times Square with his costume on, ready to dazzle crowds on the famous red stairs. He was primed for a showstopping performance, but just as he launched into his first epic monologue, he looked out and realized that no one even noticed he was there.

Tourists were busy snapping selfies, street vendors were hawking tickets to actual Broadway shows and billboards flashed ads for TV premieres, new musicals and box-office releases. No one seemed to care about him; no matter how loudly he belted out or how ferociously he gyrated, not a single eye landed on him for more than a split second. After hours of virtually invisible theatrics, he finally gave up, pulled off his costume and sat on the steps dejected, sinking his forehead into his palms.

Just then, a homeless man with a parrot on his



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Step One: Join the Chamber's Recruitment Committee



Step Two: Become the Chamber's Go-To Business Educator



Step Three: Educate, Educate, Educate




Step Four: Guide the Chamber's Strategy By Helping It Recognize It Actually Has Two Different Customers



Step Five: Follow Up, Respectfully

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**Specialized Programs for Cause Marketing  
i.e., Non-profits**

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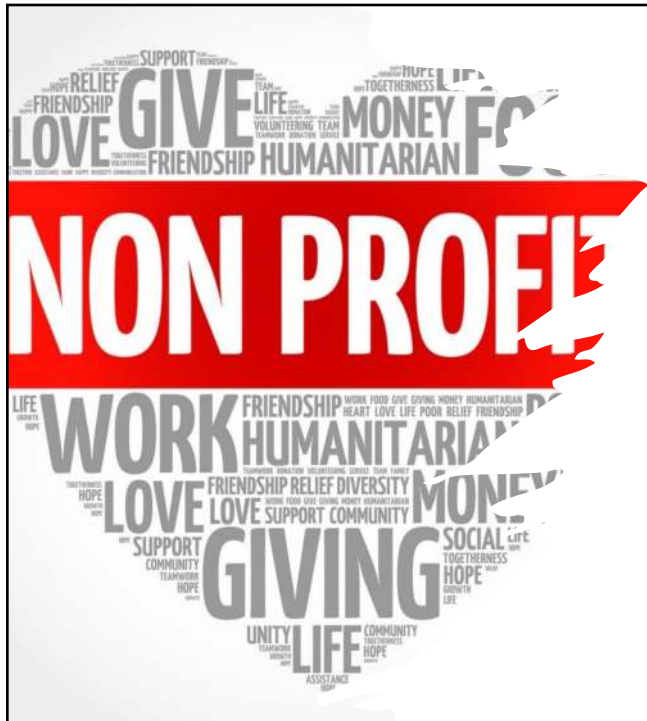


**Targeting  
Non-Profits to  
Grow Your  
Technology  
Sales**


Dale Stein, TAG/i-NETT



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With i-NETT's Technology Fund, i-NETT helps non-profits achieve their mission. We can help you take advantage of all nonprofit technology solutions such as nonprofit discounts, perks, and educating your staff on the latest product lines to build your certification stack.



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**i-NETT  
Technology Fund  
Non-Profit  
Benefits**

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## Enable Your Team’s Day-to-Day Work

Microsoft 365 with Microsoft Teams can help your non-profit improve cybersecurity, reduce costs and empower staff and volunteers to work from anywhere.

### Microsoft 365 Business Premium

An integrated solution purpose-built for small and mid-sized organizations to help you securely run and grow your nonprofit.

- Free for up to 10 users; users 11-300 discounted to \$5.50 (USD) per user per month
- Includes desktop clients of Office, Teams, Exchange, OneDrive, and SharePoint



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## Visualize Data and Measure Impact

Data is essential to your success.  
Get the tools to analyze your data and measure your impact.

Power BI Desktop	Power BI Pro
Connect to data sources, build visualizations, publish to the Power BI service, and embed on websites	All desktop features, plus 360° real-time views, data collaboration, content distribution, and more
Free	US \$3 per user per month



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## Optimize Operations and Migrate to the Cloud

Optimize your costs while securely protecting workloads across your hybrid environments. Increase agility with best-in-class Azure infrastructure built to scale with your organization’s needs.

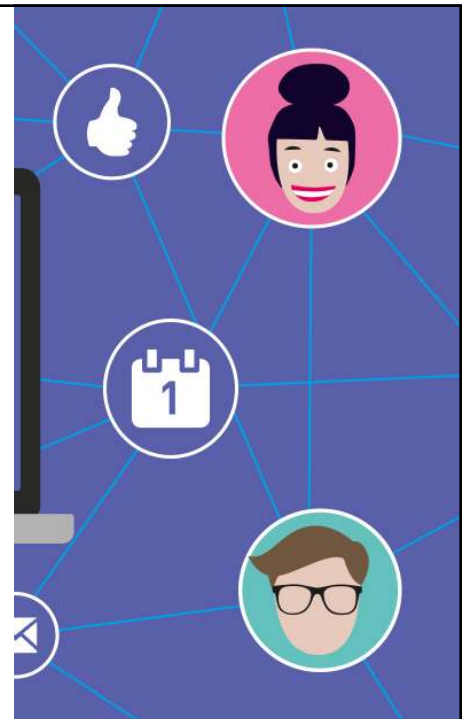
Azure	Azure Hybrid Benefit	Windows Server 2008/ SQL Server 2008 EOS
\$2,000 per credit per year	Discounted pricing and free extended security updates when you bring Windows Server and SQL Server on-premises licenses with Software Assurance to Azure.	Server and SQL Server on-premises licenses with Software Assurance to Azure.



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## 10 Hacks of Fundraising

- 1. Prep Your Team** - With Microsoft 365 with Microsoft Teams, you can ensure that your team is on the same page throughout the process. Just create a Teams channel for each event, where staff and key volunteers can chat with one another
- 2. Develop a Format to Meet Attendee Expectations** - Let your prospective participants guide you when determining the format for your key fundraising moment. Using Microsoft Cloud for Nonprofit, you can analyze your donor base’s existing behavior



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## 10 Hacks of Fundraising

3. **Create Role Clarity** - Leveraging Microsoft Project within Microsoft Teams can help you assign tasks, track assignments, and provide a one-stop-shop to view your team's to-dos
4. **Assess your Costs and Potential Revenue** - Dynamics 365 Business Central can assist your financial planning



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## 10 Hacks of Fundraising

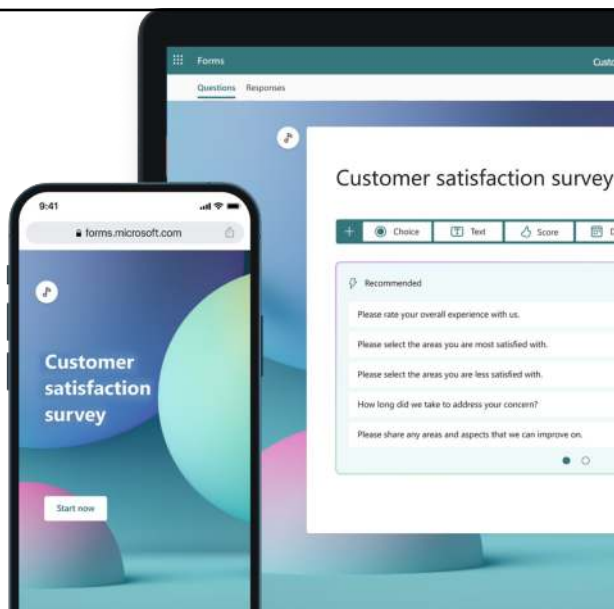
5. **Find Your Sponsors** - Track in-kind donations, manage prospective sponsors, and leverage LinkedIn Sales Navigator to find corporate donors
6. **Reach New Audiences** - Orchestrate event invitations, follow-ups, and reminders



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## 10 Hacks of Fundraising

7. **Showtime** - Use Microsoft Bookings to send your staff, volunteers, and guests reminders on the day of the event.
8. **Listen and Learn** - Microsoft Forms allows you to collect attendee feedback. Use the data to plan your next event.



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## 10 Hacks of Fundraising

9. **Thank Your Base** - The Fundraising and Engagement module helps you send out thank you letters and donation receipts to keep your patrons engaged.
10. **Report and Prepare for the New Year** - Dynamics 365 Marketing helps you track metrics year-round.



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## How Do I Contribute to the Fund?

For every **\$200/month** contributed, i-NETT will reduce your invoice by **\$100/month**



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## Additional Benefits:

- At no charge, we'll set up Microsoft SharePoint, Teams, OneDrive, and InTune
- Public Relations – Press Releases
- Will help create landing pages
- Email campaign to 8,000 businesses
- Reservations
- Invites



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### 10 Hacks of Fundraising

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Let your prospective participants guide you when determining the format for your key fundraising moment. Using Microsoft Cloud for Nonprofit, you can analyze your donor base's existing behavior.
- 3. Create Role Clarity**  
Leveraging Microsoft Project within Microsoft Teams can help you assign tasks, track assignments, and provide a one-stop-shop to view your team's to-do's.
- 4. Assess Your Costs and Potential Revenue**  
Dynamics 365 Business Central can assist your financial planning.
- 5. Find Your Sponsors**  
Track e-mail donations, manage prospective sponsors, and leverage LinkedIn Sales Navigator to find corporate donors.
- 6. Reach New Audiences**  
Orchestrate event invitations, follow-ups, and reminders.
- 7. Streamline**  
Use Microsoft Bookings to send your staff, volunteers, and guests reminders on the day of the event.
- 8. Listen and Learn**  
Microsoft Forms allow you to collect attendee feedback. Use the data to plan your next event.
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- Invites

**Additional Benefits to Nonprofit:**

- Graphic design
- Landing pages
- Reservations
- Invites

**www.I-NETT.com**  
Dale Stein  
(619) 857-4638  
San Diego/Los Angeles/Orange/  
Riverside/Phoenix/Las Vegas/  
Ventura Counties

**Helping the Community Through Nonprofit Benefits**

### Technology Fund Nonprofit Benefits

With I-NETT's Technology Fund, I-NETT helps non-profits achieve their mission. We can help you take advantage of all nonprofit technology solutions such as nonprofit discounts, perks, and educating your staff on the latest product lines to build your certification stack.

**Let us run a complimentary network analysis to see if you qualify for ongoing discounts with Microsoft and other major providers.**

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**www.I-NETT.com**

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# TECHNOLOGY ASSURANCE GROUP

# TAG Appointment Setting Program

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## Order Taking vs Creating Opportunities

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## Why Should TAG Set Your Appointment #1 TAG Will Make You Money

### Your Challenges Trying to Do It Yourself

- Lack of resources and time to set appointments
- Lack of time to hire, train, coach and manage a successful telemarketer
- Challenges developing proper scripts, motivating to make calls, listen to recordings, adjust an approach, hold accountability, etc.



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## TAG Sales Appointment Setting Outcomes

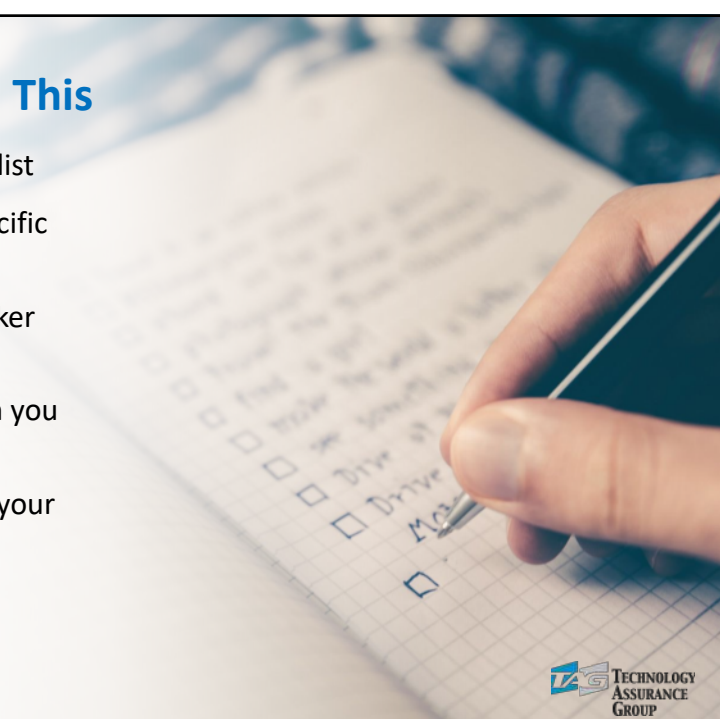
- Set appointments within your customer base to transition them to new technology
- Set appointments with “zero base” accounts – new logos
- Enable salespeople to focus on the sales process
- Increase recurring revenue
- Prevent competition from going after YOUR accounts



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## How TAG Will Accomplish This

- Partner with you to create the target list
  - Segment customers based on specific criteria
  - List must contain the decision maker title, phone, email
- Develop messaging and scripting with you to maximize appointments
- We use local numbers and represent your company



**TAG** TECHNOLOGY  
ASSURANCE  
GROUP

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## Expectations and Results

- **Month 1:** program on-boarding (organizing target lists, setting up local numbers, emails, and developing messaging/scripting, etc.)
- **Month 2:** begin making calls and optimize (2-4 appointments expected)
- **Month 3:** deliver 4-8 appointments consistently



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## Expectations and Results

### Scale Up or Down Your # of Appointments

- Example...
- Setting 20 appointment per month for Kraft (3 locations)



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## Your Investment

- \$1,250 monthly base cost plus
- \$100 per appointment customer base
- \$150 “new logos”
- Month-to-Month Agreement



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## Thank You!



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