



# CYBERSECURITY SALES MASTERCLASS

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*THE ART OF THE FOLLOW UP*

# LET'S START AT THE BEGINNING

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A jack of all trades is a master of none

Today

we will embark on our journey toward becoming a master of SOME!

# EDUCATION IS OUR JOB

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Cybersecurity is complicated but getting started doesn't have to be.

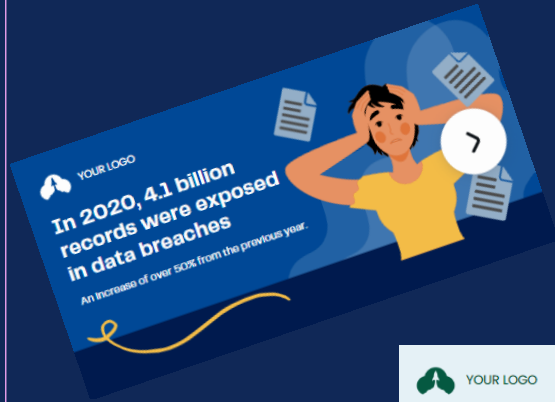
## ENGAGE TO WIN

- Today's best question wins a prize
- Today's best comment in the chat wins a prize
- Today's most active engagement will get one of our pre-release shirts





# DATA PRIVACY WEEK - JAN 22-28







- Recap
- Customer Journey
- The process
- Follow up discussion
- Planning and preparation
- Steps to success
- Questions

# CONTENTS



# RECAP

- We learned how to make our customers feel comfortable with change through education.
- We have learned some new talk tracks
- We have learned to find the “NO” before we get it at the deal table.
- We have created a simple process for building trust.
- We built a process that is designed to close
- Time for follow-up.....

# LET'S HEAR FROM THE AUDIENCE



Anyone have tips on Following up?



# Customer Journey

## Pre-meeting

Before a meeting with a customer it's good to send some relevant data they can review.



1

### Email "About Us"

Customers want to get to know you better, it's good to send info about your company prior to the meeting.

### Email stats & content relevant to the customer

Get in front of the deal and send the customer relevant information regarding their business.

### Webinar invite

Invite your customers to relevant meetups or webinars that they can get to know you with.

### Reminder email

Send meeting reminders to make sure that all key stakeholders will be at the meeting and reschedule if needed.

2



## First meeting

Remember this meeting is so that you can both get to know one another and make sure your plan spells success for the customer.

### Ask questions & clarify pain points

Remember ask questions that are relevant to your offering. Share relevant pain for similar company types.

### Understand needs & define budgets

Clarify the customers actual needs and budget as it relates to your offering.

2.1

### Clarify how your offering meets their needs

Ensure that you can clearly articulate your offering by illustrating outcomes.

### Follow up with meeting notes and next steps

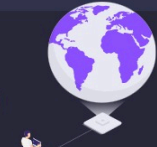
Follow up on each meeting with clear notes and next steps.

## Findings meeting

If you have a QBR or TBR process and have an assessment this is the meeting you will want to share that info.



3



## Closing meeting

Present your contracts and pricing, schedule onboarding and implementation.

## Onboarding

Set realistic expectations on timelines for completion and ensure that everyone understands your onboarding process.



4

### Clarify objectives

Be clear on what you will be doing. Clearly articulate the products and programs you will be implementing.

### Set timelines

Define the timelines and process that will occur during the relationship and what should be expected and when.

### Educate staff

Make sure that not only the stakeholders understand your program but also the entire staff. Take time to educate them.

### Communicate plan

Communication is essential to success. Communicate often and with the right people. Make sure you have a plan for this.

5

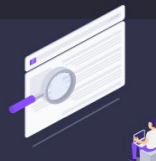


## Follow up meeting

Follow up after every major milestone in your process. Make sure your deliverables and outcomes match up with customer perception.

## Strategy call

Plan an ongoing bi-monthly strategy call. Keep momentum going along the way.



6

### Review plan

In the meeting, review the plan and it's performance. Ask questions to ensure it's meeting the customer's needs.

### Review progress

Your plan should start with some goals, based on the measurables. Make sure that the customer can also see the progress.

Follow up Here



# GOAL



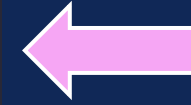
Our goal here is to make our customers and clients feel comfortable..

Remember its our job to educate them, build trust and gain rapport.

Consistency & Communication is key to success

Email Marketing & education is 71% more effective than a cold call.

On average, 5 Follow ups are required to close 80% of deals



# The Why?

35-50% of MSP buyers go for the vendor that replies the quickest and first.

Remember: Only 2% of sales close at the first meeting?

This leaves a whopping 98% of sales that require follow up.

**MORE THAN 50% OF CUSTOMER  
LOYALTY IS BASED ON THE  
SALES EXPERIENCE.**

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**From calling to closing**

*(The Harvard Business Review )*



# LET'S HEAR FROM THE AUDIENCE



Have you noticed a difference from customers if you follow up quickly and concisely?

# A PROCESS FOR DURING THE SALE SUCCESS



## Step 1 ■

While asking questions make a note so you can follow up with relevance



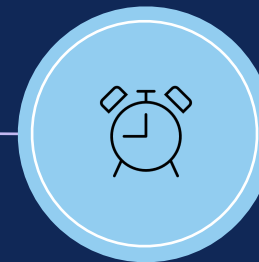
## Step 2 ■

While understanding their needs make notes to address in the follow up



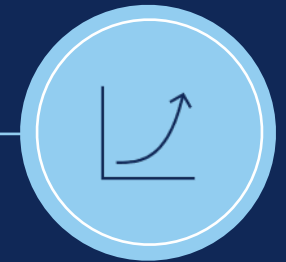
## Step 3 ■

Clarify how technology is being used so that you can make sure to build a plan to relay back



## Step 4 ■

Make sure to be clear on Next steps, findings & recommendations, QBR, contracts, other meetings/discussions.



## Step 5 ■

Send a thank you email with all the notes from the meeting with full details and next steps

# THE 5 STEP APPROACH

## Presales Follow up

- Step 1. Email About us (meaningful content about your company and preprocess that is educational)
- Step 2. Email Stats & Content relevant to the customer or customers industry
- Step 3. Webinar invite. (Optional: host webinars or have webinars from vendors that are educational)
- Step 4. Meeting reminder email (Ensure decision makers will be at your meeting – Reschedule if not)
- Step 5. Thank you email for meeting.

## During the Sale

- Step 1. Email About us (meaningful content about your company and preprocess that is educational)
- Step 2. Email Stats & Content relevant to the customer or customers industry
- Step 3. Webinar invite. (Optional: host webinars or have webinars from vendors that are educational)
- Step 4. Meeting reminder email (Ensure decision makers will be at your meeting – Reschedule if not)
- Step 5. Thank you email for meeting.

## Post-sale follow up

- Step 1. Email a thank you note and any next steps.
- Step 2. Email stake holder updates (upcoming timelines and project milestones)
- Step 3. Set Monthly update meetings for the first 90 days (continuous feedback)
- Step 4. Set annual planning meetings and set dates in advance (draft agenda)
- Step 5. Help customer with annual renewals and budget planning.

MORE THAN HALF OF BUSINESS CUSTOMERS ARE DRIVEN  
NOT BY WHAT YOU SELL BUT HOW YOU SELL IT  
SPECIFICALLY.

*It's All About the process!*

# AUDIENCE QUESTION



Have you noticed when you respond to someone quickly after a meeting, they will likely respond back quickly?

# Don't Rush

“ SLOW DOWN ENSURE YOU ARE  
CAPTURING ALL THE DETAILS AND  
FOLLOWING UP

FAIL TO FOLLOW UP AND YOU CAN MISS  
OUT ON 98% OF YOUR SALES! ”



# DESIGN YOUR PROGRAM BE THE PLAN

- Our Program is designed to protect you from (xyz) is this important to you?

## HOW ?

- Spell it out and make it measurable so you can show progress!

# REMEMBER WHAT BUYERS WANT

69% say, “Listen to my needs.”

61% say, “Don’t be pushy” and “give me relevant information.”

51% want salespeople to respond in a timely manner.

(HubSpot 2022)

## MAKE IT MEASURABLE

- Our Process will take 30 days to implement at which time we will be having bi-weekly meetings to discuss the following.
  - Implementation
  - Risk remediation
  - Exposure
  - Opportunities
  - Timelines
  - Education

**Pro tip:** Every one of these points is a follow-up, make sure you have a plan.

# PEOPLE BUY PLANS

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That demonstrate success

# HERE IS WHERE IT GETS REAL

- Follow up is a real thing, if you don't do this right, you might as well stop now!
- If you have a QBR/TBR process, make sure that you start as soon as you begin having a conversation.
- If we don't have a plan that is measurable, we need to go back to the drawing board.
  - The NO you will get here is, NO I don't think I see success with you.
  - Make sure your plan is real and you can clearly articulate it.

Industry stats:

Acquiring a new customer costs 5–25 times more than keeping an existing customer.

*(Harvard Business Review 2022)*

# RESOURCE

## Connect with your customer

- Before
- During
- After the sale

### FOLLOW-UP PROCESS

Connect with your customers  
before-during-after the sale

#### PRESALE

1. Email an "About us" message with meaningful & educational content about your company and pre-process.
2. Send stats & content relevant to the customer or their industry.
3. Send an educational webinar invite. (either one you're hosting or from another vendor).
4. Send a meeting reminder email and ensure decision makers will be at your meeting – reschedule if not.
5. Send a thank you email for setting the meeting!



#### DURING THE SALE



1. Take notes while asking questions so you can follow up with relevance
2. Note their needs to address in the follow up
3. Clarify how their technology is being used so that you can build a plan to relay back
4. Be clear on next steps, QBRs, findings and recommendations, contracts, and other meetings & discussions.
5. Send a thank you email with your notes from the meeting, full details and next steps

#### POST-SALE

1. Send a thank you email, including next steps.
2. Email stakeholder updates (upcoming timelines and project milestones)
3. Set monthly update meetings for the first 90 days (continuous feedback)
4. Set annual planning meetings and set dates in advance (draft agenda)
5. Help them with annual renewals and budget planning.



#### ONGOING EDUCATION

1. "About us" email and social
2. Biweekly drip campaign of content about your services or products
3. Monthly invite for webinar or meet and greets in your area.
4. Email we are here if you need us.
5. Call quarterly to see how they are doing and if they need any assistance.



hello@hacware.com  
hacware.com/msp

 **HacWare**



# RESOURCES

## Customer Talk tracks

- What cyber threat concerns you the most?
- Are your information security and business priorities aligned?
- Do we know where our data is and how it is protected?
- Are our employees being appropriately trained on cybersecurity?
- Do we know how to respond in a cyber security emergency?
- Do your documented policies match what is actually happening in your practice?

## Hack assessment

- <https://resources.hacware.com/hack-assessment/>

## Value Visualizer

## QBR Resources

## Customer Journey Map

## 5 Step plans for follow-up

# SUMMARY

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Take your time & plan to win.

Follow up quickly

Communicate often



<https://iotssa.com/cybersecurity-expo-phoenix/>



Juan Fernandez, HacWare/MSP Growth  
Masterclass in Building an MSSP



**Cybersecurity Expo**

Phoenix, February 16-17

Code:  
PHX-  
MSP  
GROWT  
H



# Master Class Live

# CONNECT WITH US

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