

# How to Deliver the Perfect Sales Presentation

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# You are in the right place if...

1. You are unsure of how to present your services in a sales call
2. You don't have a clear agenda for a sales meeting
3. You are not seeing results from your existing sales team
4. You are hesitant to hire a salesperson
5. You are unsure how to price your offering

# What is CloudRadial?

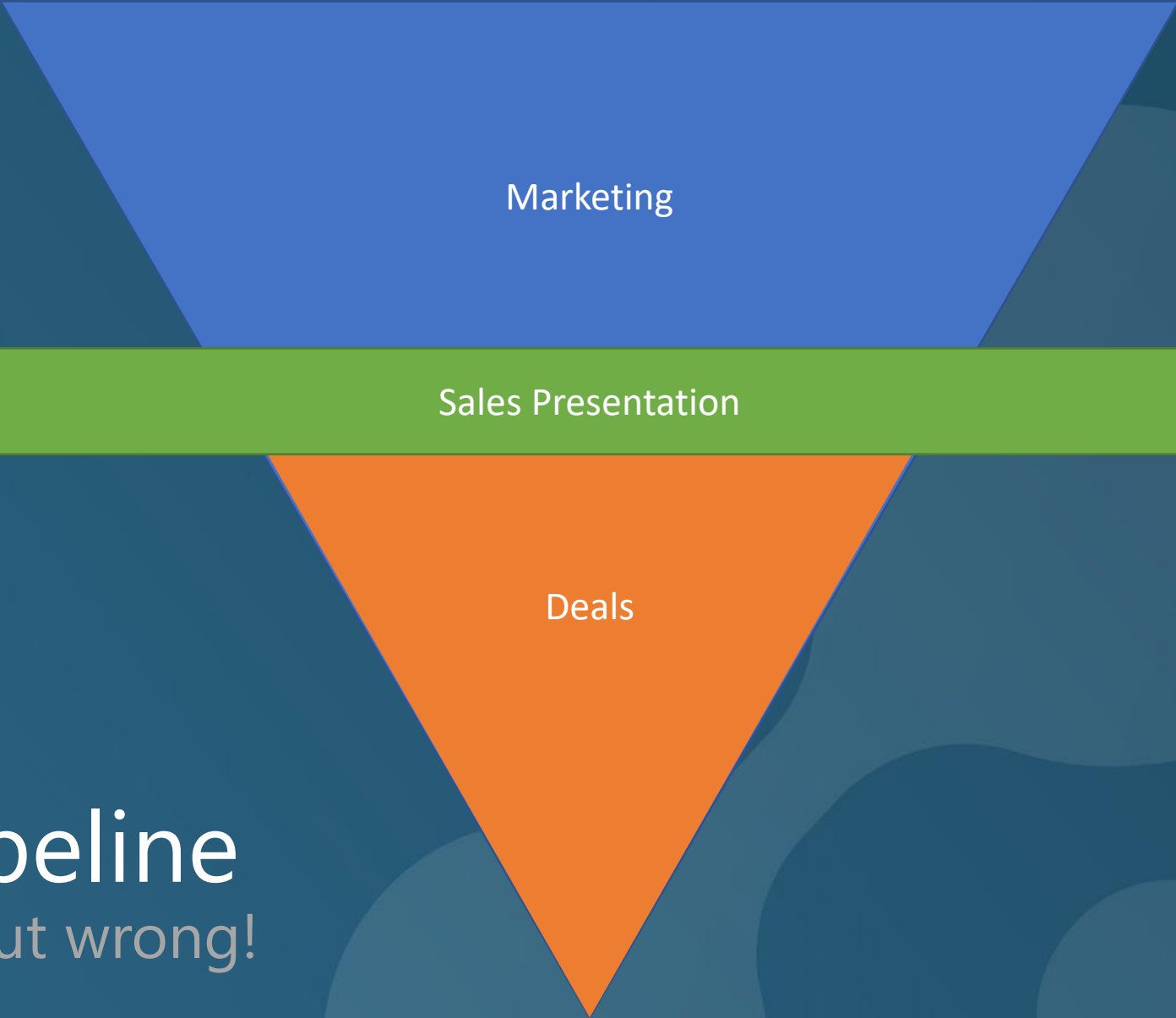
- SaaS solution for MSPs
- For you, CloudRadial is an **integrated** account management platform that reduces costs, improves sales and client retention
- For your clients, CloudRadial is your branded **client portal**
- We take what you do and make it **transparent** and insightful to your clients

# Jeff Farris - Bio

- **Saber Software 1988-1995 (IT Management)**
  - Software to manage Novell & Banyan networks
  - #26 Inc 500 Fastest Growing Company
  - NASDAQ IPO in 1994 (SABR)
  - Sold to McAfee in 1995 (\$60M)
- **e2 Communications (Marketing)**
  - Cloud software for advanced email marketing
  - Crashed and burned in dotcom meltdown (\$0M)
- **BubbleLife (Local Businesses)**
  - Neighborhood news platform
  - Struggled to compete with changing news models
  - Sold to digital marketing company

“I don't like sales people and therefore don't want to be one.”

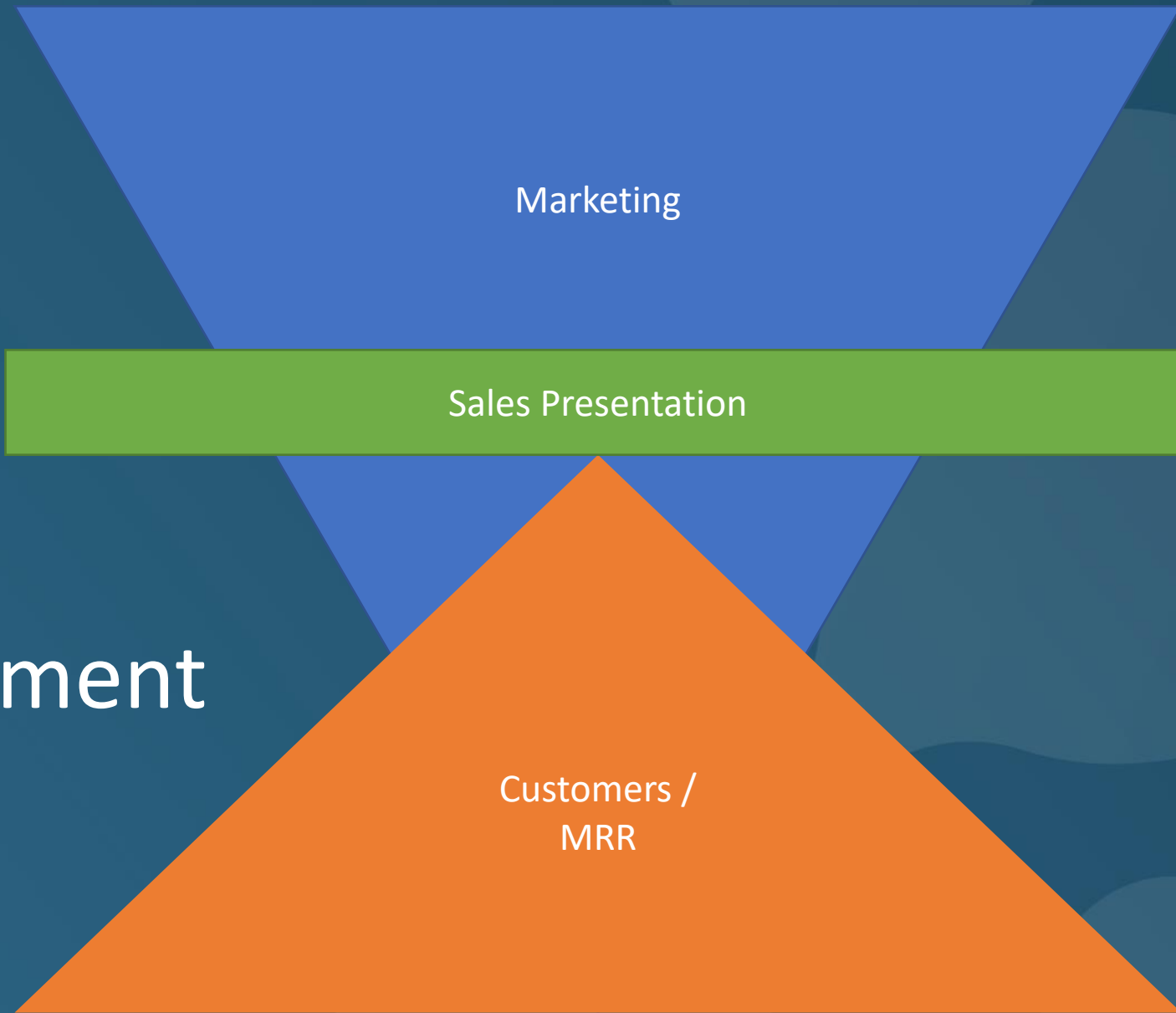
So, don't be a salesperson!



# Sales Pipeline

Traditional but wrong!

# Account Management Pipeline



# Sales Success

## Keys

- Client Mindset
- MSP Persona
- MSP Products
- MSP Preparation
- MSP Presentation



A top-down view of a laptop on a wooden desk. The laptop is open, and several light-colored sticky notes are scattered on its keyboard and screen area. To the left of the laptop, a small green plant with long, thin leaves is visible. The entire scene is overlaid with a semi-transparent blue filter.

# Client Mindset

Thinking Like a Customer

# Client Mindset

## Client Concerns

- What are you selling?
- How will it benefit me?
- Who else uses this?
- Why you?
- What should I expect to see?
- Will I feel good about this?

# Client Mindset

## What MSPs sell?

- Managed services
- Antivirus/firewalls
- Cloud infrastructure
- Office 365 licenses
- VoIP

## What clients buy?

- Decision making
- Collaboration
- Productivity
- Continuity
- Compliance
- Security
- Efficiency

# Client Motivations



## Fears

I worry something bad will happen or I will look foolish.



## Wants

I want my business to grow and to achieve my goals.



## Ego

I want to look like a hero and feel smart about my actions.

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# MSP Persona

Where Do You Fit on Your Client's Team

# MSP Personas

## **Service**

- Skilled
- Technical
- Transactional
- Repair focused
- Charges
- Service vocabulary
- Talks about the service

## **Advisor**

- Experienced
- Consultative
- Outcomes
- Retainers
- Client vocabulary
- Talks about the client
- Improves with time

# MSP Deliverables

## Service

- Labor / Time
- Varies on need

## Product

- Intellectual property
- Consistent
- Explainable
- Tangible
- Clear Benefits

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# MSP Products

Helping Clients Understand What You Do



# Office 365 Missed Value

## What MSPs sell?

- Microsoft 365 Business Standard (Business Premium)
- Value: \$12.50 US/month

## • What clients buy?

- Decision making
- Collaboration
- Productivity
- Value: \$200+ US/month?

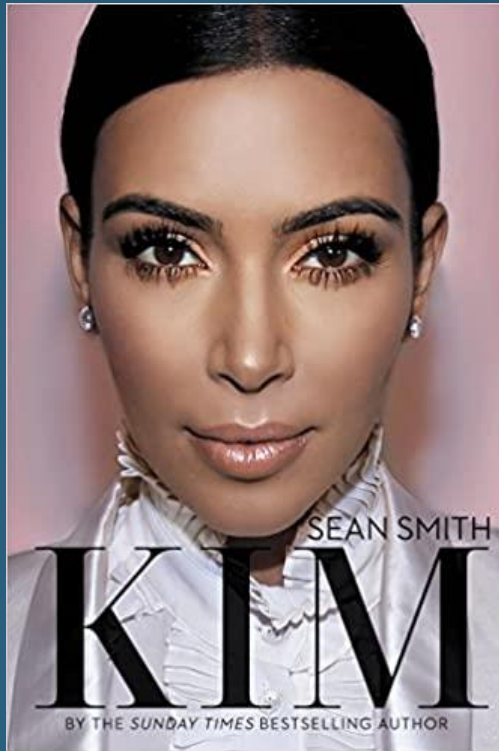
# MSP Intellectual Property Behind 365

- Licensing choices
- Management coordination
- Implementation plan
- Project management
- Prerequisite setup
- Additional procurement
- User coordination
- Provisioning
- Training
- Rollout
- Monitoring
- Security
- Support
- Upgrades
- Reporting
- Tips

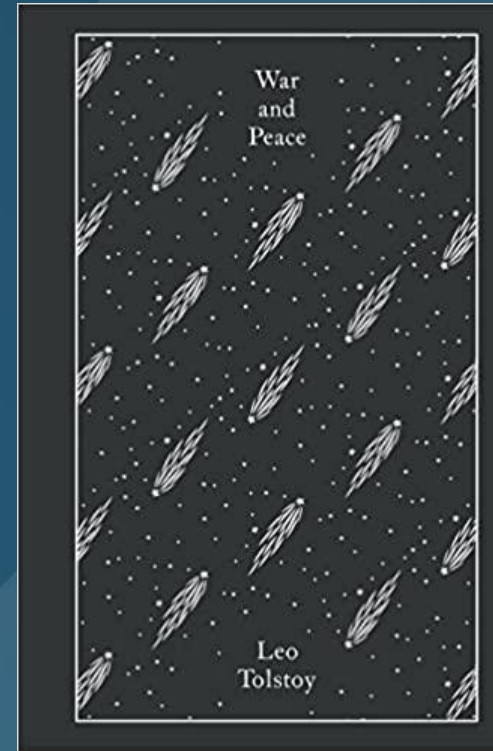
# Pricing



# Pricing



\$24.67 - Amazon



\$20.99 - Amazon

# Pricing

- The more similar the items, the more comparable the price
- Labor is replaceable
- Intellectual property is unique
- Labor is an hours sale
- Intellectual property is a value sale



# MSP Preparation

Success = Preparation + Opportunity

# Before the Meeting

- Visit their website
- Research on LinkedIn
- Know their industry vocabulary
- Know their news
- Know their customers
- Know their goals
- Know how you can make them better
- Make sure you have the right products

# MSP Mindset

- They will be a client someday
- We can truly make their business better
- They will close when they are ready
- We can show them the kind of service they can expect from us
- My appearance matches my persona (web, collateral, etc.)
- They will talk to other MSPs but will see our advantages





# Meeting Presentation

Your First Account Management Meeting

# SalesMOR key ingredients

- Right mindset
- Right products
- Right preparation
- Vision and plan
- Excitement

# Agenda

- Introductions
  - People & motivations (why did you get the meeting?)
  - Friend or foe?
- Guided Listening
  - Get their SWOT – strengths, weaknesses, opportunities and threats
  - Let them tell you why they need you to manage their account
- Transition to confidence
  - Empathy
  - We help businesses like yours...
- How can you help them?
  - Apply the lessons from guided listening
  - Illustrations and case studies
- Next Steps
  - Audits, evaluations, demonstrations, proposals

# Do you understand how to answer?

1. How are you going to save us money?
  - Improve efficiency through cloud options
  - Minimize technology disruptions
2. How are you going to make us money?
  - Improve productivity, collaboration and decision making
3. How are you going to reduce our risk?
  - Reduce risk from online and email
  - Reduce compliance exposures

# Talk to the needs of each attendee

- Employee/staff
  - Ease of access
  - Timeliness
- Office manager
  - Processes
  - Reporting
- IT Staff
  - Help & assistance
  - Hero maker or replacement?
- Owner
  - Vision
  - Partnership

# Illustrations

1. A day in the life of a company employee
2. A day in the life of an office manager
3. A day in the life of an IT manager
4. A day in the life of the business owner

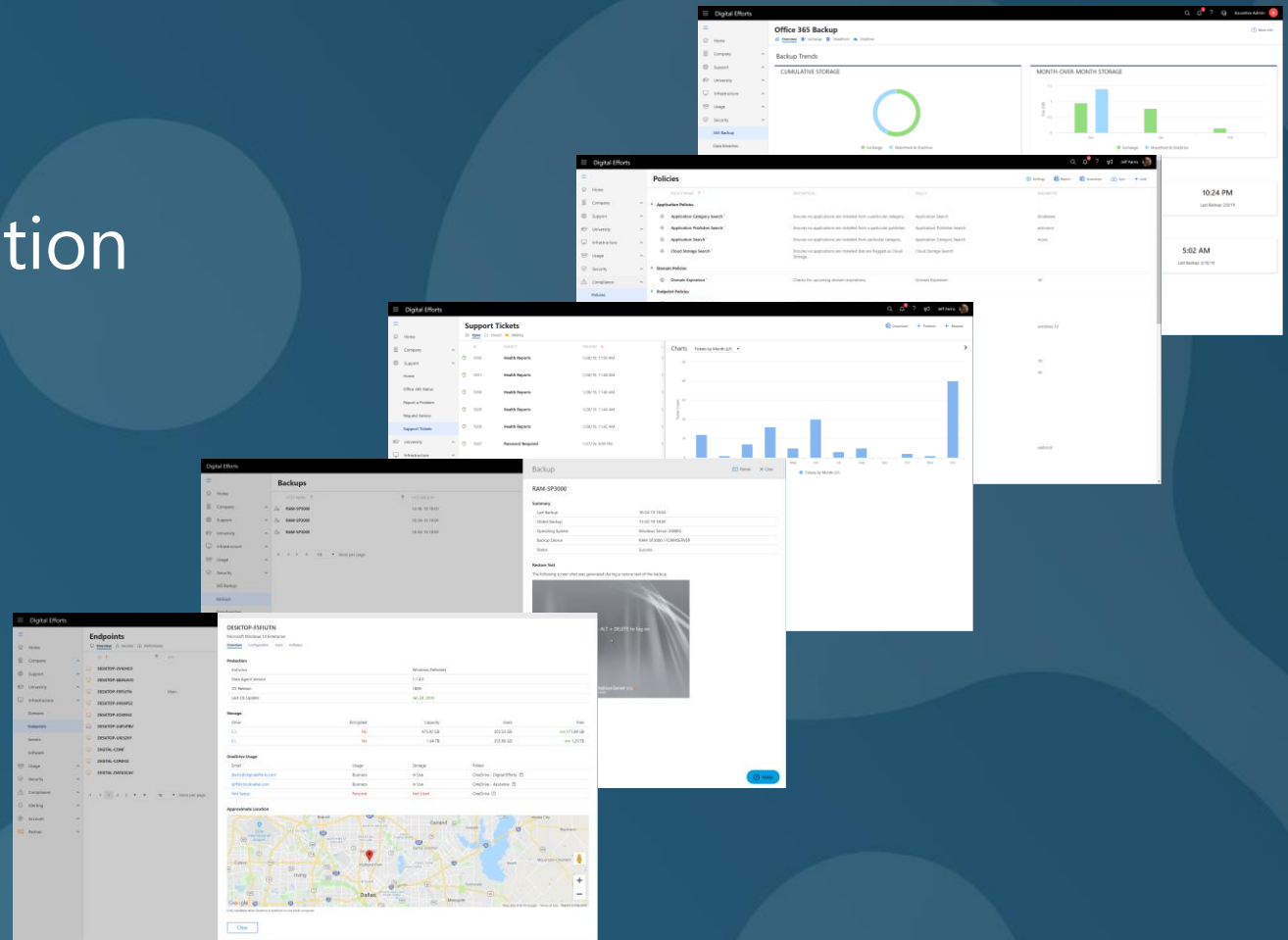
# Deliver simplicity to employees

The screenshot displays a user interface for a 'Request Service' portal. The top navigation bar includes the text 'Digital Efforts' and a search bar. A left-hand navigation menu lists categories such as Home, Company, Support, University, Infrastructure, Usage, Security, Compliance, Alerting, Account, and Partner. The main content area is titled 'Request Service' and features a search bar and a 'Top Referenced Requests' section. This section contains ten service cards arranged in a 3x5 grid. Each card includes a category header, an icon, a title, a subtitle, and a primary action button. The right-hand sidebar contains sections for 'Popular' requests, 'Categories' (with a list of categories and counts), 'Latest' requests, and 'Tags'.

Category	Service Title	Action
Phones & Tablets	Order a Desktop Phone (Polycom Series)	REQUEST QUOTE
Printing & Scanning	Order a Personal Printer (Individual Use Printer)	REQUEST QUOTE
Computer Hardware	Order a Standard Laptop (Standard Laptop)	REQUEST QUOTE
Computer Hardware	Order an Executive Laptop (Premium Laptop)	REQUEST QUOTE
Computer Hardware	Order Computer Accessories (Additional Equipment)	REQUEST QUOTE
Office Access	Request Parking Security Card (Parking Garage Access)	REQUEST
Business Operations	Schedule IT Futures Review (IT Road-map review)	REQUEST CONSULT
Apps & Software	Setup Computer Phone (Enable Phone from Computer)	REQUEST
Computer Hardware	Setup Multiple Desktop Monitors (Monitor Setup)	REQUEST QUOTE
Phones & Tablets	Setup Office 365 on Mobile (Mobile Setup)	REQUEST
Apps & Software	Setup OneDrive (OneDrive Setup)	REQUEST
Apps & Software	Setup Password Theft Protection (Password Protection)	REQUEST

# Deliver a Process to Office Managers & IT

- Compliance information
- Data governance information
- Usage information
- Asset information
- Security information
- Policy exceptions
- Status reports
- Service reports





# Deliver a plan to owners

The screenshot displays the Microsoft Planner interface for a project named "Digital Efforts". The interface is organized into a grid of tasks across quarters (Q1, Q2, Q3, Q4) and a final "Installed" column. A blue arrow points from the "Resolve Endpoint Issue" task in Q2 to the "Managed Security" task in the "Installed" column.

Task	Category	Quantity	Pricing	Priority / Status	Timeline
Power BI	Decision Making	10	\$200 / month	Medium / Proposed	Recommended
Resolve Policy Exception	Security	-	-	-	Recommended
Resolve Email Issue	Security	-	-	-	Recommended
Resolve Training Issues	Compliance	-	-	-	Recommended
Encryption	Security	-	-	-	Recommended
Resolve Policy Exception	Compliance	-	-	-	Recommended
Data Governance Audit	Compliance	-	-	-	Recommended
Office 365	Productivity	10	\$300 / month	Medium / Proposed	Q1
Azurative Office Backup	Continuity	-	\$6 / month	Medium / Proposed	Q1
Office-365-Ready Conference Room	Collaboration	-	\$2,500 (estimated)	Medium / Proposed	Q1
Cloud PBX	Collaboration	10	\$300 / month	Medium / Proposed	Q2
Resolve Endpoint Issue	Efficiency	-	-	Medium / Proposed	Q2
Deploy Teams to All Users	Collaboration	-	\$100 (estimated)	Medium / Proposed	Q3
Hardware Refresh	Efficiency	10	\$14,000 (estimated)	Medium / Proposed	Q4
Managed Services	Efficiency	-	-	-	Installed
Managed Security	Security	-	-	-	Installed

# Case Studies

1. Before and after examples
2. Similar industries show understanding
3. Make it about them and customers like them

No case studies?

<https://customers.microsoft.com>

# Proposal

- Show them why it's about them (personal)
- Show them what they will get
- Show them how it addresses their needs
- Show them why it needs to be you
- Price is your area of expertise

# Clients - After the Proposal

- Starts to imagine life with/without you
- Starts noticing issues they didn't see before
- Invites others to propose a solution
- Asks references for information
- Pushes back on price

# Sign up for a trial today

See for yourself how QBRs become more!

[www.cloudradial.com/trial](http://www.cloudradial.com/trial)

The screenshot displays a QBR dashboard with several sections:

- Planner:** A grid of task cards categorized by quarter (Q1, Q2, Q3).
  - Recommended:** Includes tasks like "Power BI", "Resolve Policy Exception", "Resolve Email Issue", and "Resolve Training Issues".
  - Q1:** Includes "Office 365", "Azurative Office Backup", and "Continuity".
  - Q2:** Includes "Cloud PBX" (marked as "Strongly Recommended") and "Resolve Endpoint Issue".
  - Q3:** Includes "Deploy Teams to All Users".
- Voice:** A table showing P2P counts for audio and video.

EMAIL	P2P COUNT	P2P AUDIO/VIDEO
jfarris@digitalearths.com	0	0 / 0
saffie@digitalearths.com	0	0 / 0
- Charts:** Two line charts are visible:
  - Skype Activity:** Shows activity levels over time.
  - OneDrive Usage:** Shows storage usage in MB over time, with a significant spike in early January.
- Data:** A table listing user activity.

NAME	SITE URL	LAST ACTIVITY
Jeff Farris	https://digitalearths-my.sharepoint.com/personal/jfarris...	2019-01-02
Saffie Farris	https://digitalearths-my.sharepoint.com/personal/saffie...	2019-01-26