



MSP MARKETING AND SALES BEST PRACTICES

CHAPTER 1

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Chris has spent a couple of months under the wing of a more senior sales guy, but now it's time to venture out on his own. He's young, ambitious; maybe not the most tech-savvy person in the growing MSP he works for, but he's learning. And with a little wit and charm to spare, customers will like him. Besides, in this market, it's hard to find experienced technical sales people—and harder still to afford them.

Chris will do just fine, the boss tells himself.

Today, Chris is visiting a prospective client and he's got no real agenda. The discovery process? He plays it by ear.

He talks with the owner of Bolsa Electronics, gets a quick run-down of their processes and issues. His company doesn't have other clients in the electronics industry, but it could be big money for them. He jots a few notes, gives the owner a ballpark quote, and heads back to the office.

"You quoted him WHAT?!" the boss says.
Dangit, Chris has underpriced it again.

See yourself in this picture? Know what's wrong with it? Let's identify what good looks like if you're trying to run a mature MSP.

Sure, a casual sales process can get you started as a one- or two-man shop. Beyond that, you need more formal processes to scale.

Here are 7 steps for success in MSP Marketing and Sales!

SYNOPSIS

This article provides an overview of best practices MSPs can follow to enhance and scale their marketing and sales processes.

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1. DEFINE YOUR IDEAL CUSTOMER

For Chris, it didn't matter whether his company had experience with an electronics company; he just had dollar signs in his eyes.

If your MSP is just getting started, your clients may come from various industries. Over time, you should start to focus and home in on your sweet spot. Why? Because given your talent, bandwidth, and existing customers, you excel somewhere and that's where you should focus your resources.

Look at your clients. Consider factors like industry, size of the company, and the psychographics of the teams you work well with. What do they value and believe?

Inherently, you can see differences between your break-fix accounts and managed services clients. Your goal is to articulate these differences, so you can isolate the key characteristics of your ideal customer and begin to develop expertise in a specific vertical.

Here are three different ideal customers examples for three different MSPs:

	MSP A	MSP B	MSP C
MATURITY LEVEL	Low	Medium	Low
IDEAL CUSTOMER	K-12 Schools	Hospital	Local Stores
EMPLOYEE COUNT	50-100	1000	1-50
VERTICAL	Education	Healthcare	Retail
BUSINESS SYSTEM	ERP	EMR	POS

Once you can clearly articulate the characteristics of your ideal customer, try creating buyer personas. Check out [Channel Futures guide to creating Buyer Personas for your MSP](#).

Great! Now that you know your ideal customer, how can you reach them?

There are countless ways.. Here are a few resources to get you started:

- **Solar Winds MSP:** 5 Tips for Effective Social Media Marketing
- **SmarterMSP:** Why marketing your MSP is more proactive than you realize
- **Robin Robins:** What is MSP Marketing? 21 Strategies to Drive New Business

SAYING NO WHEN IT'S A BAD FIT.

Sometimes a lead comes in that's far from your ideal customer. Maybe your sweet spot is SMBs with 50-100 employees, and this 1,000 employee fish jumps into your pipeline. What do you do?

If you're wise, you'd say no; developing a process where team members like Chris recognize the bad fit saves your team from hidden disasters. Stick with your sweet spot for maturity level, employee count, and vertical.

There are times when it's okay to accept an outlier, but if this customer is going to require you to drastically re-write or adjust your existing processes, that's usually a good indicator you're better off saying no.

5 Tips for Effective Social Media Marketing
<https://www.solarwindsmmsp.com/blog/5-tips-effective-social-media-marketing-msp>

Why marketing your MSP is more proactive than you realize
<https://smartermsp.com/marketing-msp-proactive-realize/>

What is MSP Marketing? 21 Strategies to Drive New Business
<https://www.technologymarketingtoolkit.com/what-is-msp-marketing.php>

ConnectBooster
<https://www.connectbooster.com/10-things-consider-choosing-crm-software/>

Gary Pica - TruMethods
<http://www.trumethods.com/blog/bringing-in-business-msp-sales-secrets-for-generating-more-leads>

2. DEVELOP A SALES PROCESS AND STICK TO IT

As soon as you know who you want to reach and how you're going to reach them, it's time to start tracking your leads. Existing CRM tools can be an ideal solution given the finite time and resources you have to manage your sales pipeline. ConnectWise, HubSpot, Salesforce, and Zoho are a few CRM options.

But it doesn't matter so much which one you choose. So long as your CRM integrates to your PSA, and you create and stick to a system for using it, you're in good shape.

If you're in the midst of deciding on a CRM, check out this checklist from ConnectBooster: [10 Things to Consider When Your MSP is Choosing CRM Software](#).

When it comes to tracking leads, Gary Pica recommends breaking them down into three categories: returning, warm, and cold. From there, your team can focus its energy on the hottest leads.

3. DO A SALES RECONNAISSANCE

When an ideal customer makes it into your sales pipeline, it's time for what we like to call a sales reconnaissance, or just "recon" for short. This is your homework before the first meeting. You want to walk in prepared, already having researched the company, industry, and any publicly available information on their infrastructure. Don't be like Chris who walked in without a plan.

Here are the five key things you should research prior to setting foot in your prospect's office:

1. **Website:** Who are they and what do they do?
2. **Internet Domains:** Where did they register their domain and when will it expire? Are the registrar details still relevant? Use Roar or a Whois lookup here.
3. **DNS:** Does DNS reveal important information like their email service or where the website and data center is located.
4. **TLS:** Do they have an active TLS certificate? Use Roar or an online TLS lookup.
5. **Identity Monitoring:** Are any of the leaders or employees at their company at risk for identity theft? Use Roar or haveibeenpwned.com for this.
6. **News:** Has this company been in the news recently? What's going on in their industry?

Create a document that includes what you have researched and plan on going through each one during your first meeting. Keep in mind, it's a real delight for a customer when an MSP meets them and says, "Hey, I saw an article about you last week..." It's a simple way to show you understand their industry and care about what's happening.

4. GO THROUGH BASIC SALES DISCOVERY DURING THE FIRST MEETING

Alright, now what you've done your sales reconnaissance, it's showtime! How do you kick off the meeting? Imagine what Chris, the sales guy, could do to start moving into the role of trusted advisor. Rather than just asking questions, take time to share and educate. Whether you have knowledge and expertise in the technologies they use or you've discovered a domain is about to expire, lay out the facts and share what you can already see.

Your goals for the first meeting are to develop rapport, get a feel for their pain points, and an inkling on their technology. To gain deeper insight into your prospect's needs and network—and to start building a relationship—print out the questions from the sidebar to ask during your first meeting.

You can then decide if a formal sales assessment is required or not. The success of this initial meeting ties back to how well you identified your ideal prospect. If it's a good fit, you'll feel like a fish swimming with the current.

Rapport will be easy when it's an industry you know, a size you're familiar with, and a level of touch you can handle. If you're faced with a lot of unknowns during this initial meeting, it's time to take it back to the drawing board and evaluate if it's a good fit.

5. DO A SALES ASSESSMENT (QUICK OR DETAILED, YOU DECIDE)

If during the initial meeting you get a sense that their technology is complicated, doing a sales assessment will reduce the risk of drastic mis-scoping. Some MSP owners will tell you a warning sign for this comes down to gut feel. If you hear a lot of hemming and hawing when you ask a question, you should do an assessment.

A sales assessment can be as efficient and simple as bringing a sales engineer with you to install a Roar agent for fast discovery. Get quick access into an environment to do an Active Directory scan or a high-level network scan. If your initial discovery yields a confused and neglected environment, you'll want to go deeper and do a detailed sales assessment. That way, you'll have visibility into everything—all users, systems, network setups, infrastructure, cloud, and on-premise systems.

The key here is to deliver a rapid, but low-risk proposal that defines the scope of the engagement so there's no room for confusion. If you're spending too much time and resources on assessments, it can be a big loss if you don't get the client.

QUICK SALES DISCOVERY CHECKLIST

GENERAL OVERVIEW

- What are your biggest concerns when it comes to managing your company's technology?
- How did you find us?
- If they have another MSP, are you at a point where you'd consider moving?
- Are you evaluating any other MSPs?
- What are the key things you're looking for in an MSP partner?

A DEEPER DIVE INTO THE COMPANY AND TECHNOLOGY

- How many offices do you have?
- How many employees do you have?
- Do all use technology?
- What 's your IT budget?
- How do you typically make purchase decisions for outside services?
- What applications and services are you using? (Office 365, Google Cloud...etc.)
- How many users do you have in the above systems?
- Can you tell me about the technology landscape here?
- How many endpoints do you have?
- Do you have a refresh cycle?
- What are critical business systems and their vendors?
- Do you backups in place?
- How much time does supporting your technology take from you?
- Do you have admin access to all of your systems?

6. GENERATE A LOW-RISK PROPOSAL

Once you have a clear picture of their technology landscape, you can generate a low-risk proposal. Low-risk means you've explicitly defined the scope of the engagement so there is no room for confusion.

A LOW-RISK PROPOSAL WILL:

- **Include a detailed systems list.** Have the client sign off on these systems. This asset inventory will carry over to the onboarding team. This approved list will also be helpful to have in your back pocket if/when new systems are discovered or added later.
- **Assign value to everything you do.** Capture the time you've already invested with the client, including the assessment, then decide whether and how you'll charge or discount for it. Whatever you choose, make sure it is included as a line item in the proposal.
- **Give them a roadmap for next steps.** What are the first projects your team will undertake? Share 1-2 things that you see as the most pressing for getting started with your team. These initial projects can set you up for quick wins and set the tone of your on-going relationship.

7. MAKE IT A SMOOTH HAND-OFF TO ONBOARDING

Whoohoo, a newly signed contract! A new customer means it's time to set your whole team up for success with a clean hand-off to onboarding. Here are three things your sales team should do when passing the baton to the onboarding team:

- **Put all sales assessment results in your documentation.** Whether that's Word docs, questionnaires, attached to a ticket, in Roar, or in a documentation solution, make sure everything gets documented. You'll need to figure out a system for the user-generated content, but all of the automated configuration and system details will already be in Roar.
- **Give your onboarding team a heads up.** Your sales team should have a lay of the land in terms of assets, personalities, and allies at the new client company. Let your onboarding team know who they can rely on to get what they need.
- **Use automation to get as far as you can.** Make the hand-off as paperless as possible, harnessing the tools your team is already using. For example, your sales team may have captured company details in a sales questionnaire that went straight into HubSpot, where it's easy for your onboarding team to access.

Remember, your salespeople are the hunters. Don't make them do too much after the sale. Creating a system to seamlessly pass information from one team to the next gives even young sales guys like Chris the tools and processes to quickly get back out and close more deals.

THE HAND-OFF

The following can help organizations kick off the new relationship on the right foot:

- Add your sales assessments results into your documentation system
- Communicate clearly with onboarding
- Automate as much as you can.

RECAP

To run a mature sales operation, you should:

1. **Define your ideal customer** and create a buyer's personas for them
 2. **Develop a sales process and stick to it** - it doesn't matter what tool you use, as long as you use it
 3. **Do a sales reconnaissance** - research what you can, so that you walk into your first meeting strong
 4. **Go through basic sales discovery during the meeting** - print out questions to ask at the initial visit
 5. **Do a sales assessment** - quick or detailed, you decide based on the complexity of the prospective client
 6. **Generate a low-risk proposal** - list out the systems, the value of your work, and what's next
 7. **Make it a smooth hand-off to onboarding** - put your sales assessment notes in a central location
- **REPEAT!**

RELENTLESS.

Learn more about Roar and how we automate system documentation, detect change, and assess to best practice.

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