

Rank N Bank: Client Getting Checklist

Google Eligibility Pre-Requisite Checks

- ☐ Business is licensed and insured (often posted on website or in advertising)
- ☐ Confirm Availability (97% of zip codes are available, even rural areas per Google Lead Rep)
- ☐ Confirm Niche Availability

Use Google's List: <https://support.google.com/localservices/answer/6224841>

Receptivity Test – *determines the likelihood of a response*

- ☐ Prospect's Google Profile is mostly optimized
- ☐ Prospect is advertising online or offline (Spending money)
- ☐ Prospect is not already in the Google Guarantee program
- ☐ Prospect has a modern, feature-rich website

PROTIP: Prospects who do not have a website (or is generally neglecting their online presence) are less likely to be responsive. Such are indicators that the prospect does not care about online marketing. In some cases, they can be persuaded to change tactics with additional effort at the cost of your time.

Building A Prospecting List

- ☐ Create A Master Spreadsheet Of Prospects
- ☐ Record Business Name
- ☐ Record Business Email Address
- ☐ Record Telephone Number
- ☐ Record Website(s) URL
- ☐ Record Social Media Profile URLs
- ☐ Record Owner/Contact Name & Contact Information

PROTIP: Resist the urge to use lead scrapers and generated prospect data. Prospects should be “hand-sorted” meaning a human looked at the prospect to determine their status. You can use an outsourcer to build your prospecting list, but ensure they are doing it by hand and not using computer generated list

Finding Contact Information

- ☐ www.manta.com
- ☐ Use the State's listings for the Division of Corporations to find owner info
- ☐ www.whois.com – use domain name registration information
- ☐ LinkedIn / Facebook Pages – owners typically post as self
- ☐ Telephone the business and ask for contact information for proposal submissions

PROTIP: Again, an outsourcer can help you find this information. Do not use lead scrapers or expect results with bulk raw data lists from data warehouses. Higher quality lead research will produce higher quality leads and thus, better results.

Contacting Prospects

- ☐ Use the cold email approach email templates (included with this course) to gauge responsiveness
- ☐ Use the closing email sequence on responsive prospects
- ☐ Follow up with prospects who have gone unresponsive
- ☐ Contact 1x week (7 days) for 4 weeks until prospect buys or rejects you (rejection lead)
- ☐ Follow up with rejection leads after 6 months (situations/ideas/moods change over time)

PROTIP: Expect to do a minimum amount of prospecting and “first / second” contacting. Follow-ups help you close new deals if you are in a pinch. You can make up shortfalls in responsive prospects by increasing the volume of outbound cold approaches.