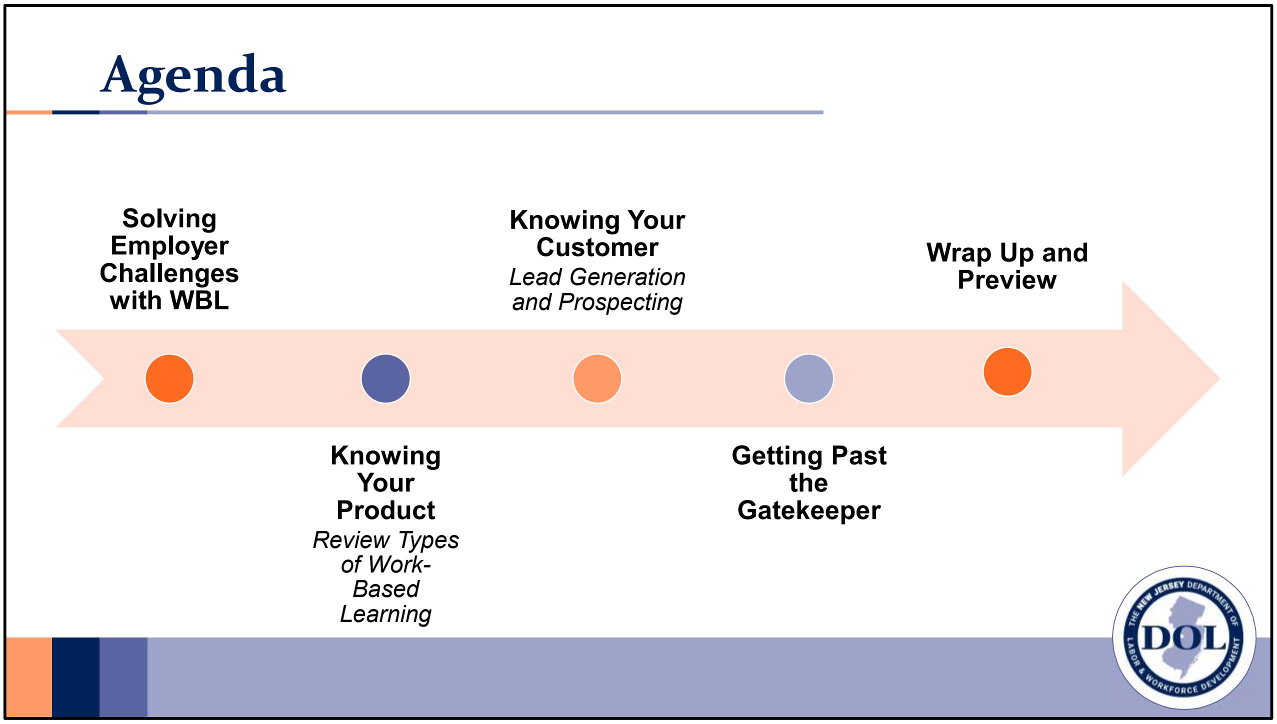
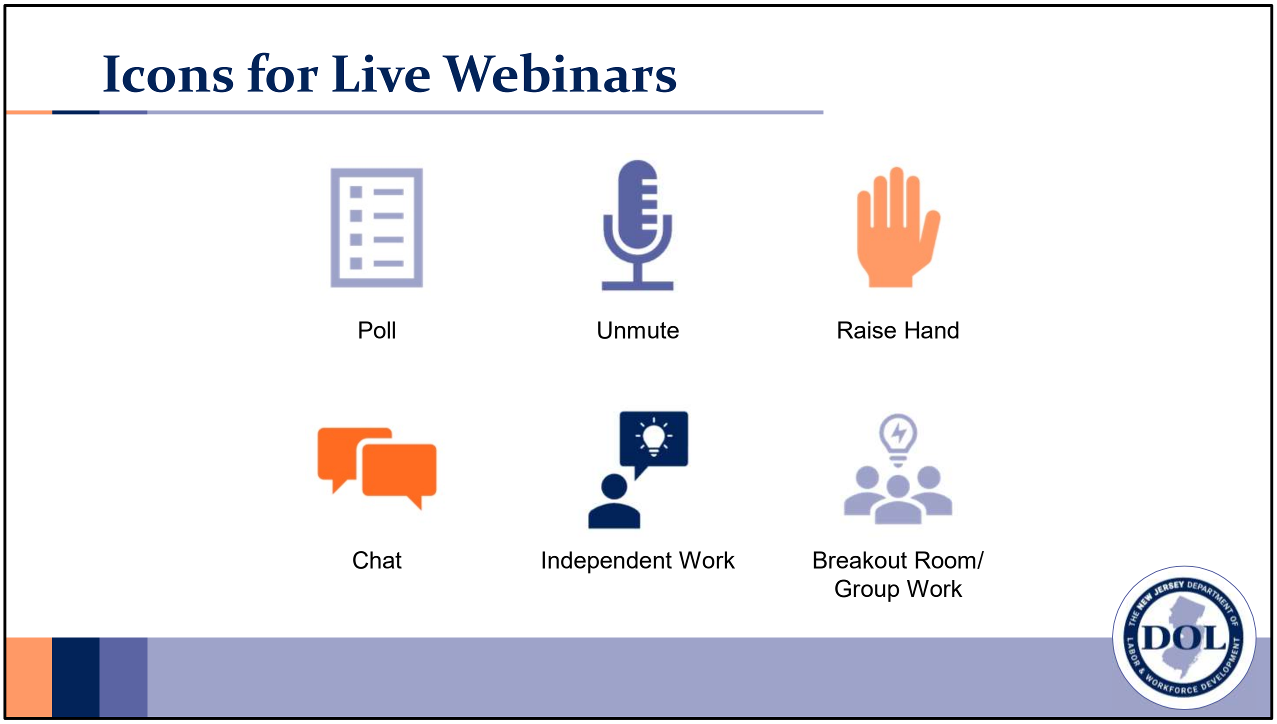
Work–Based Learning 201

Lead Generation, Prospecting, and Getting Past Gatekeepers

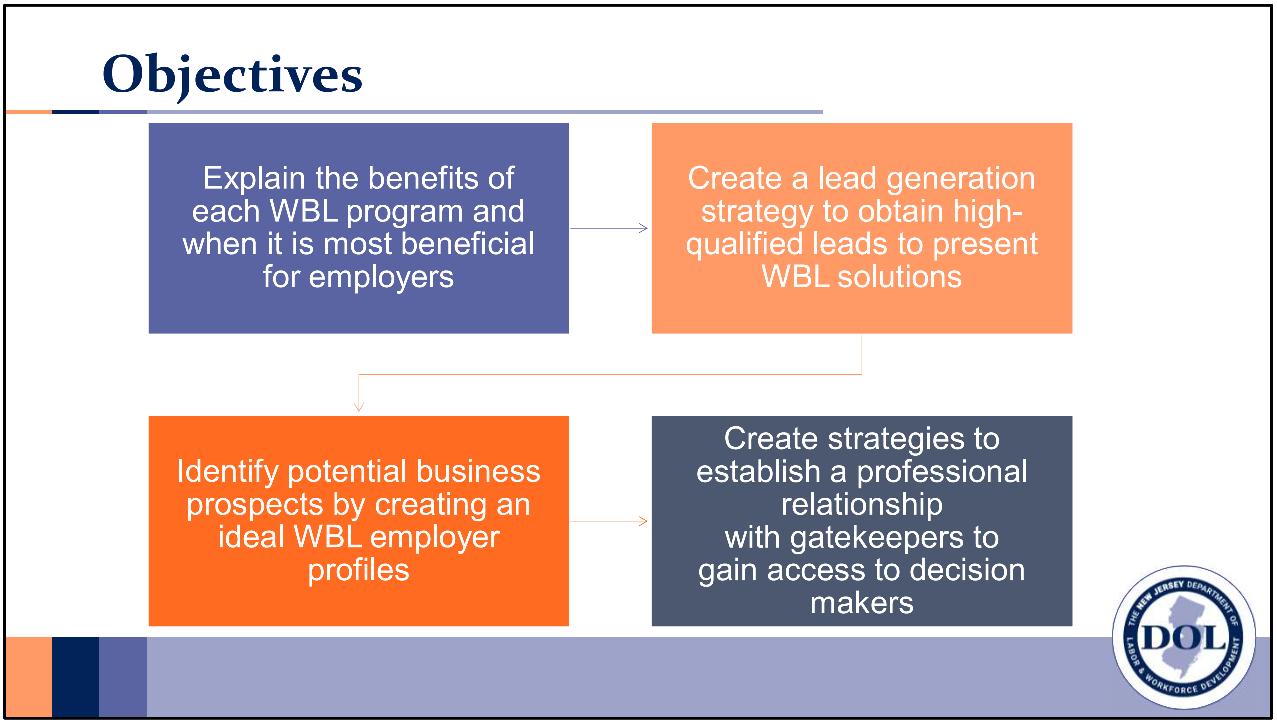
- Welcome to "Work-Based Learning 201: Lead Generation, Prospecting, and Getting Past Gatekeepers"! This training, along with the next one, focuses on the relationship with the employer and essentially how to "sell" work-based learning programs to them.



- Our agenda for today is:
  - An introduction section, where we are now, to share the agenda, objectives, and webinar tools
  - We will first discuss our general approach to the idea of selling WBL programs.
  - Then, we will review our "products" – the four types of WBL.
  - We will also look at the importance of knowing our "customer," and two different ways of doing outreach to them!
  - Next, we will cover getting past the Gatekeeper and building relationships and rapport which is one of the fundamental tools in being successful with WBL.
  - We will conclude a wrap-up and preview section, where we will summarize what was covered and look ahead to the next module in this series.



- Each symbol on this slide represents a type of workshop activity delivered via webinar. Review each symbol and its meaning.
  - Poll: Participants will take a poll, on screen, and we will be able to look at and discuss results.
  - Unmute: In response to a prompt, participants are invited to unmute themselves (or be unmuted) in order to share.
  - Raise Hand: Participants can virtually signal a hand raise or agreement when the facilitator asks for a show of hands.
  - Chat: Participants respond to a question in the chat feature where everyone can see.
  - Independent Work: Participants complete something individually and independently during the webinar.
  - Breakout Room: In groups, participants go to virtual breakout rooms where they work on or discuss something.



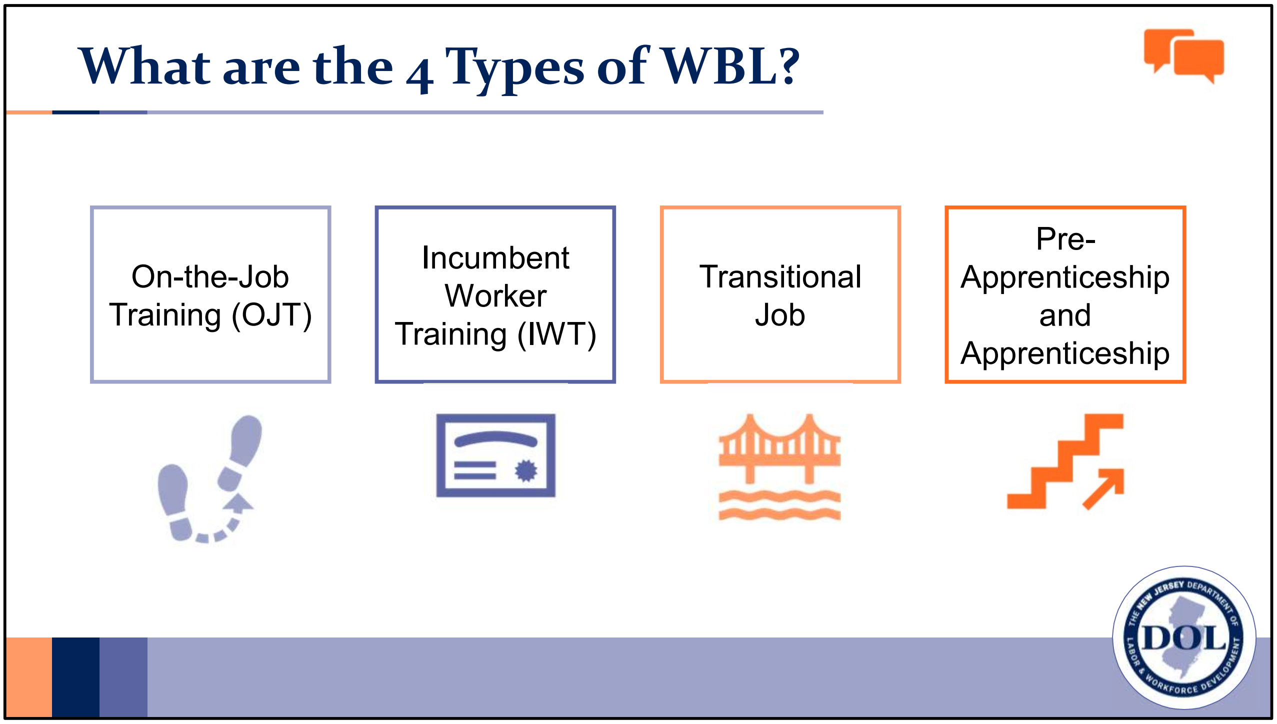
- By the end of this part of the workshop, you will be able to:
  - Explain the benefits of each WBL program and when it is most beneficial for employers
  - Create a lead generation strategy to obtain high-qualified leads to present WBL solutions
  - Identify potential business prospects by creating an ideal WBL employer profiles
  - Create strategies to establish a professional relationship with gatekeepers to gain access to decision makers

- We are going to reframe the traditional sales perspective by focusing on a more collaborative, relationship-centered approach. Starting today, let's see things differently. Instead of selling something to employers, you are solving employer challenges with work-based learning solutions. With WBL you want to look at it as a solution to help both customers, your employer and the job candidate.
- Reflection questions
  - What is the difference between “selling” and “developing solutions”?
  - How does approaching sales from this lens change how you frame and approach challenges? How is this different than what you may have done or thought before?
  - What are some examples of “challenges” that employers express?

- Let’s briefly review our product: Work-Based Learning!

What is Work-Based Learning (WBL)?

✓ A formal arrangement between an employer, candidate, and workforce development entity to provide paid employment. WBL involves upskilling and training a candidate.



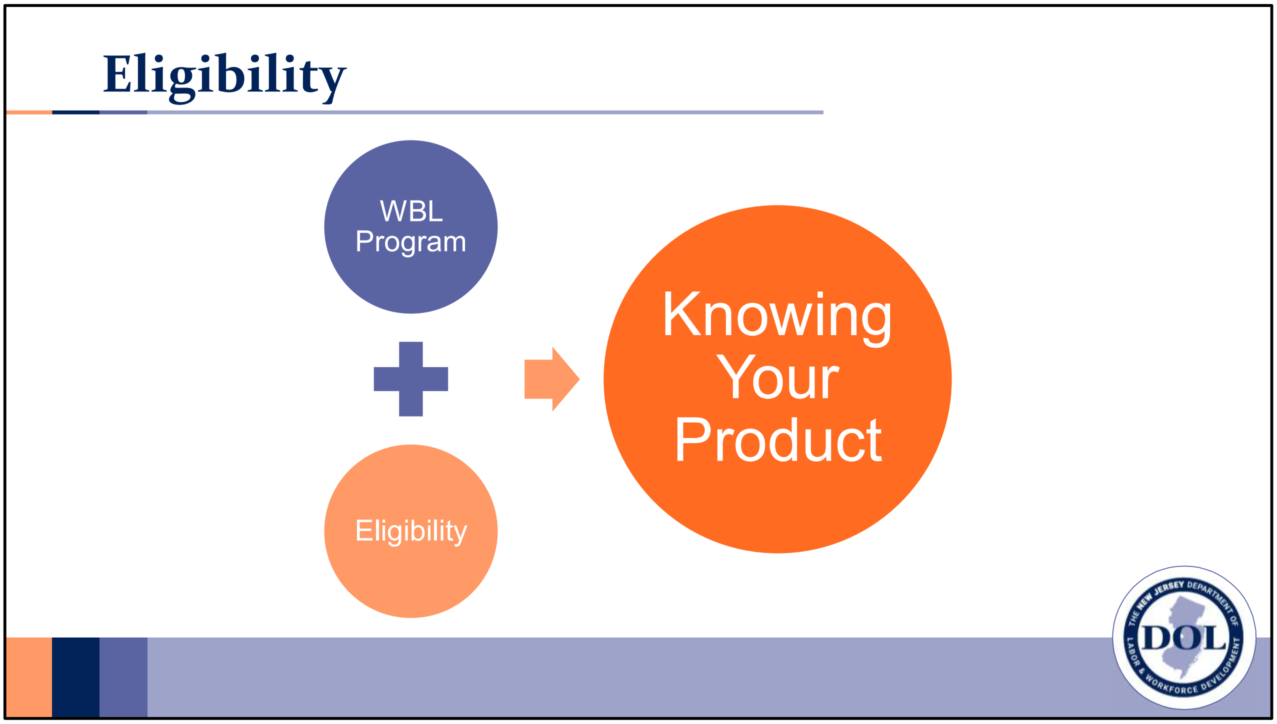
- Four main types of WBL that we discussed in the first module are:
    1. On-the-Job Training (OJT)
    2. Incumbent Worker Training (IWT)
    3. Transitional Job
    4. Pre-Apprenticeship/Apprenticeship
- Not all staff members work with all types of WBL, at least currently. However, even if workforce staff may not use each type, consistent understanding is important for communication, to consider implementing a new WBL, and being better able to meet both employers' and candidates' needs!

4 Types of WBL- 4 Truths and a Lie

Registered Apprenticeship

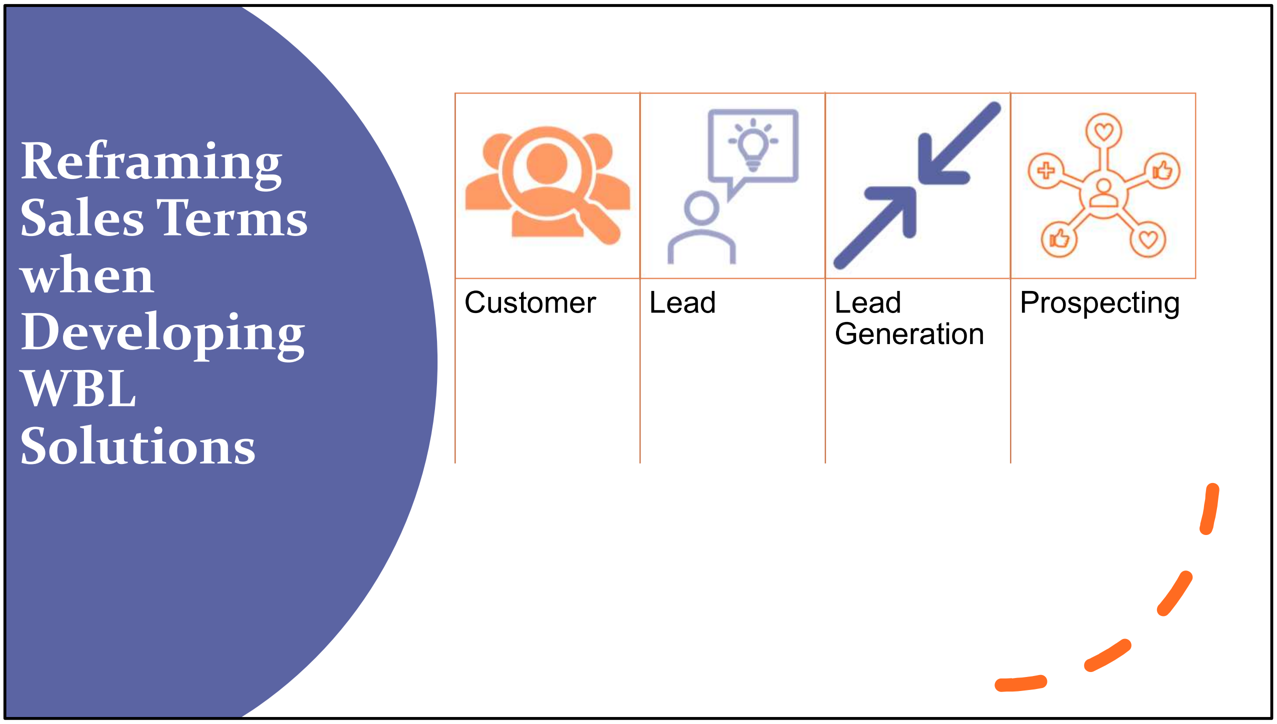
Which statement is not a characteristic?

A. Includes on-the-job training as well as classroom training
B. Historically in the trades and with unions but today's apprenticeships are more diverse and with or without unions.
C. Involves technically skilled occupations
D. Requires worker to be under the age of 25 years old
E. Approved by the federal government

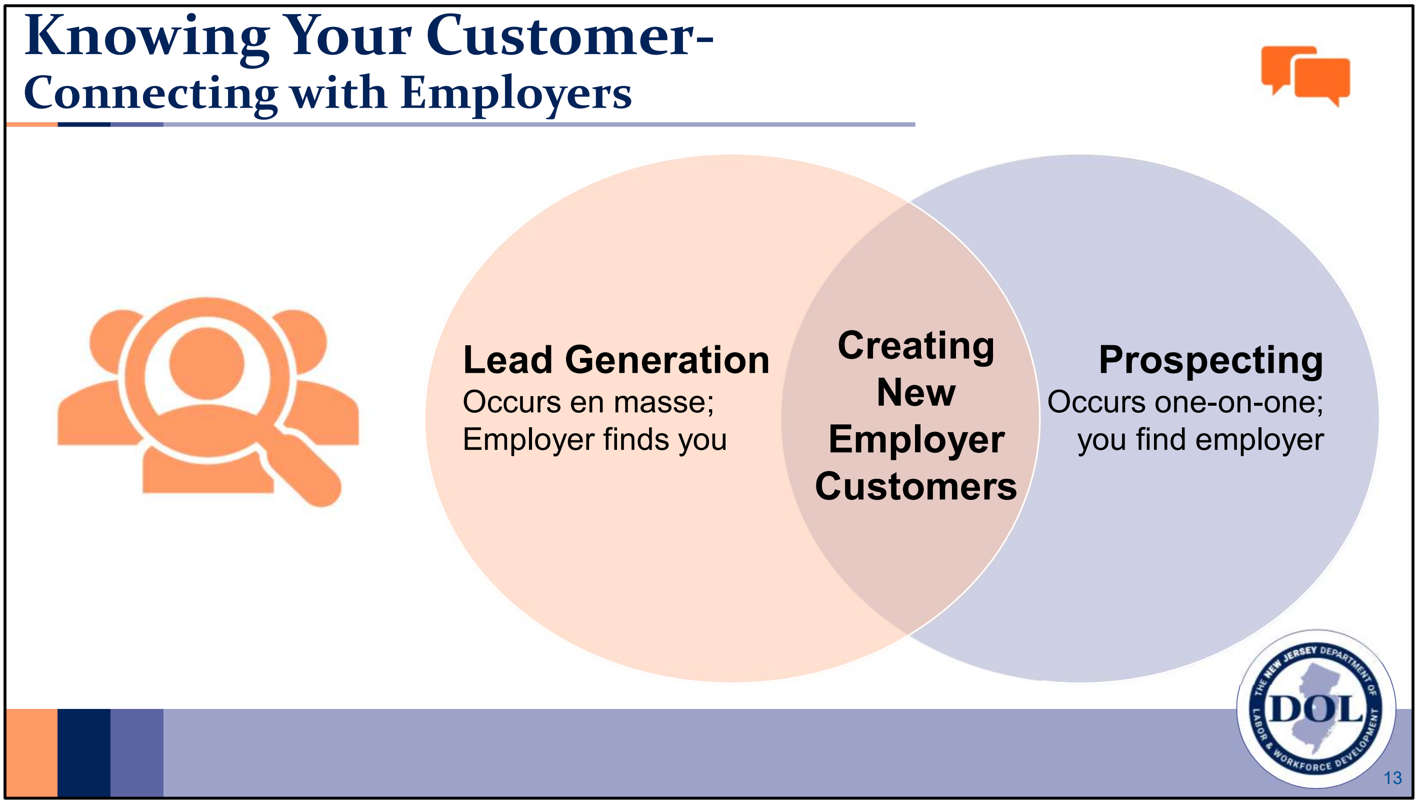


- An important part of knowing your product when it comes to work-based learning is knowing the eligibility requirements. These will vary by the type of WBL and also by the funding stream. When you are connecting WBL to customers (employers), it is crucial to be cognizant of eligibility requirements so that you are screening out occupations, employers, or candidates that are not eligible. For example, knowing that a 1099 position is not eligible for funding for a WBL program will keep you from wasting your time and the employer's if that's what they do.
    - Note: Even though it's important to be aware of basic eligibility requirements, when it comes to funding, it is best not to be too specific, or overpromise, to the employer. Funding changes so it is a good idea to stick with generalities or with past examples instead of making specific statements that could come across as promises!
- Remember, eligibility is not the same thing as suitability. Just because you can, doesn't mean you should! Someone might be eligible for a program but not be a good fit that program!

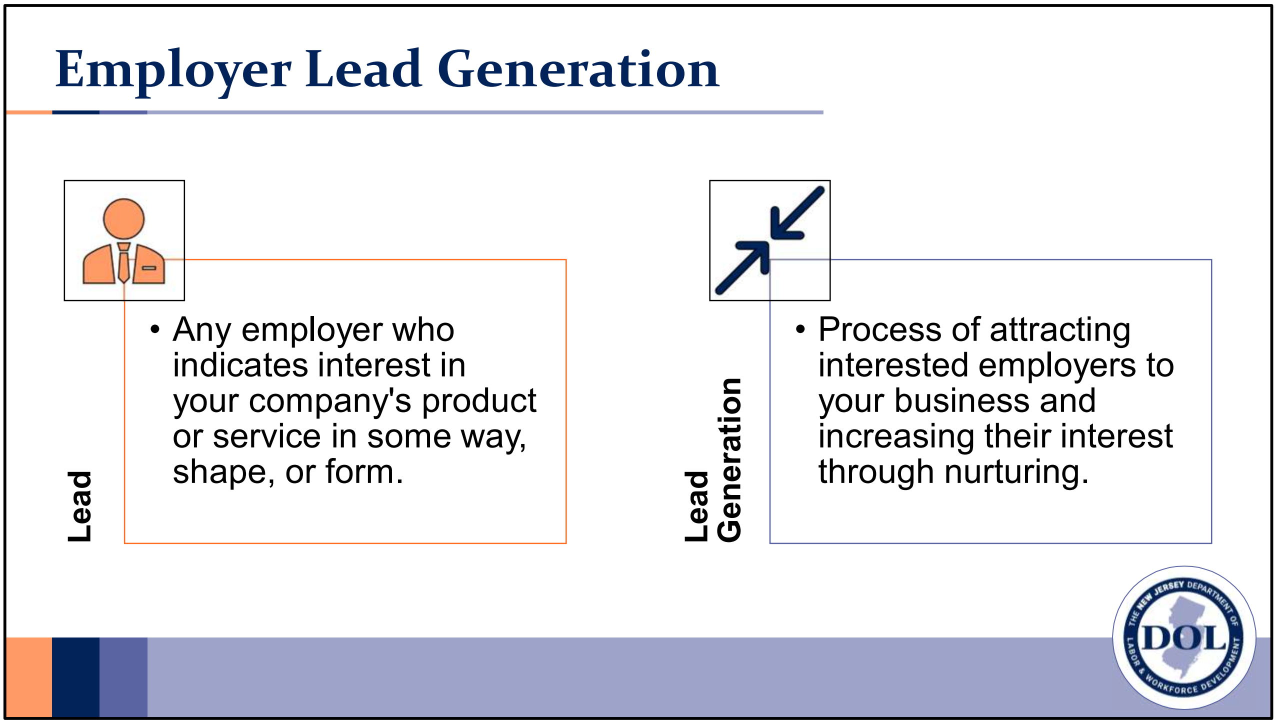
- In order to solve employer challenges with work-based learning solutions, you need to not only know your product, but also know your customers!



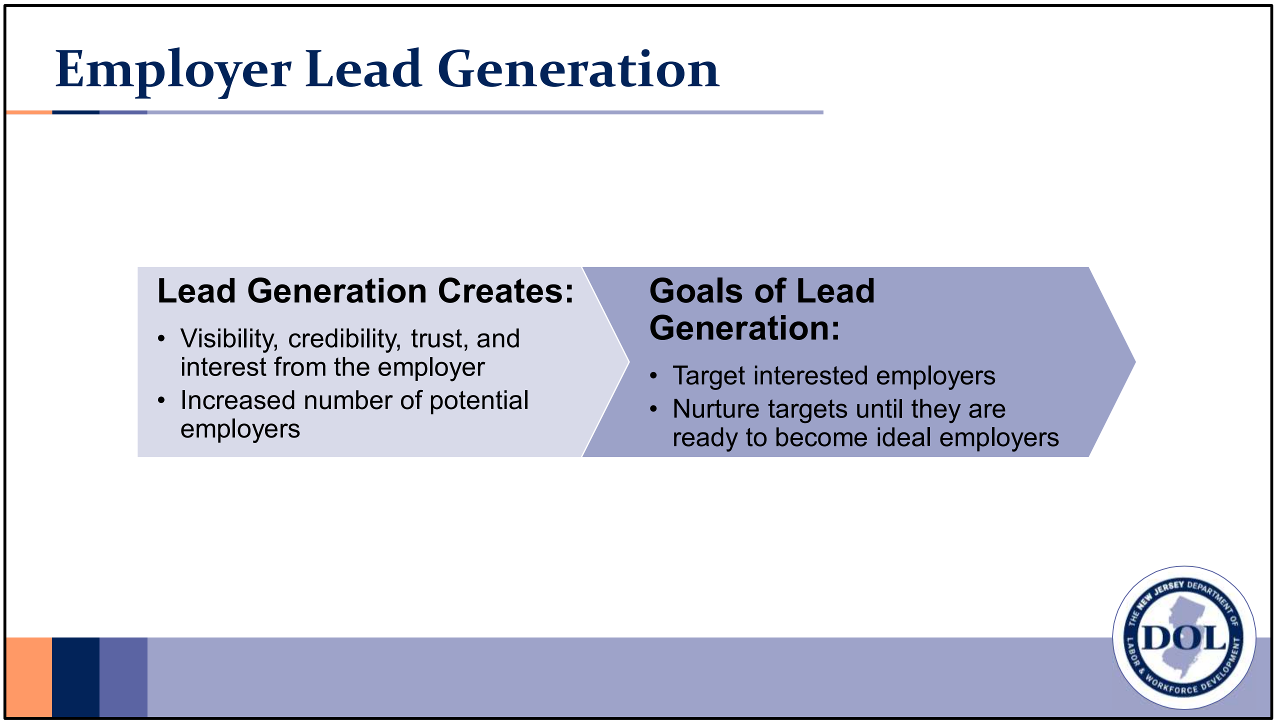
- In our roles we have two main customers. Our two direct customers are the employers and the job candidate. We want to solve the employers' staffing or training challenges. We also want our job candidates matched to a suitable and desirable position that possibly leads to growth. By considering sales in terms of solving employer challenges with WBL solutions, we can approach these sales concepts with a collaborative, win-win-win (you, the employer, and the candidate) attitude.



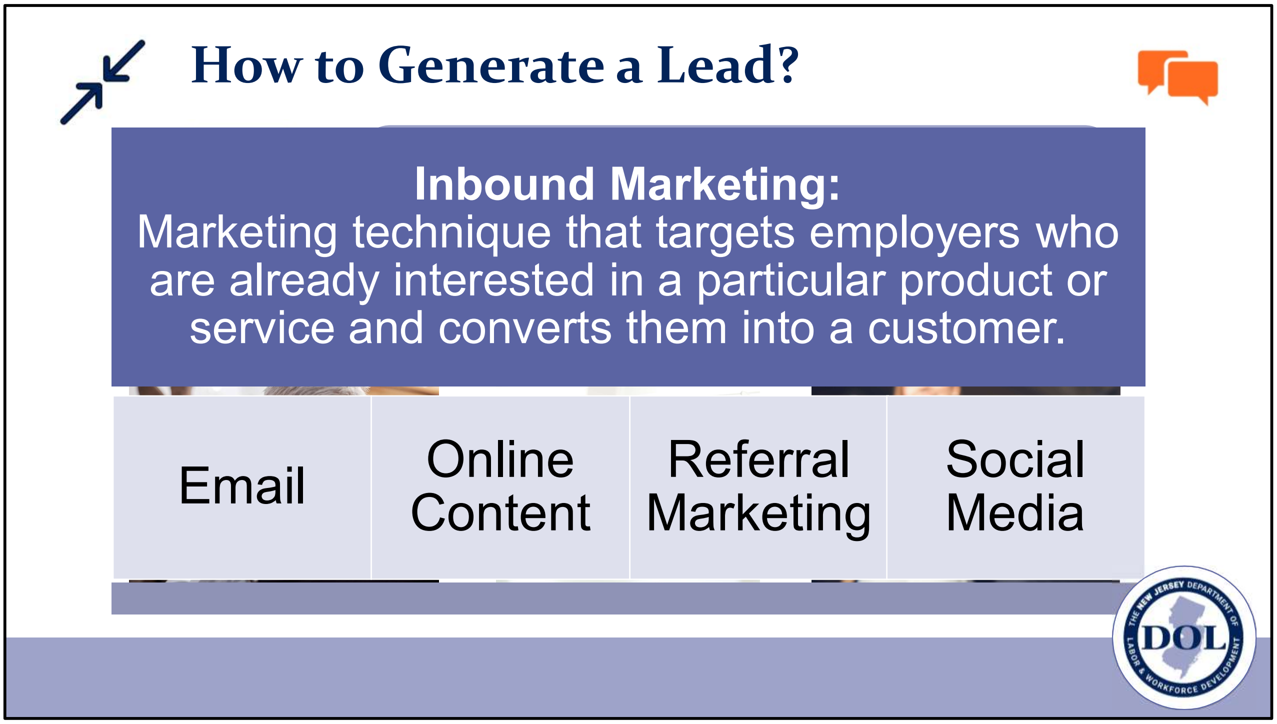
- Lead generation can occur in mass, with the customer reaching out to you as an interested party.
- Prospecting is when you target a specific individual or company to try and convert them to be a future customer. This occurs one-on-one.



- A lead is any employer who indicates interest in a company’s product or service in some way, shape, or form.
- Lead generation is then the process of attracting interested employers to your business and increasing their interest through nurturing, all with the end goal of converting them into an ideal employer.



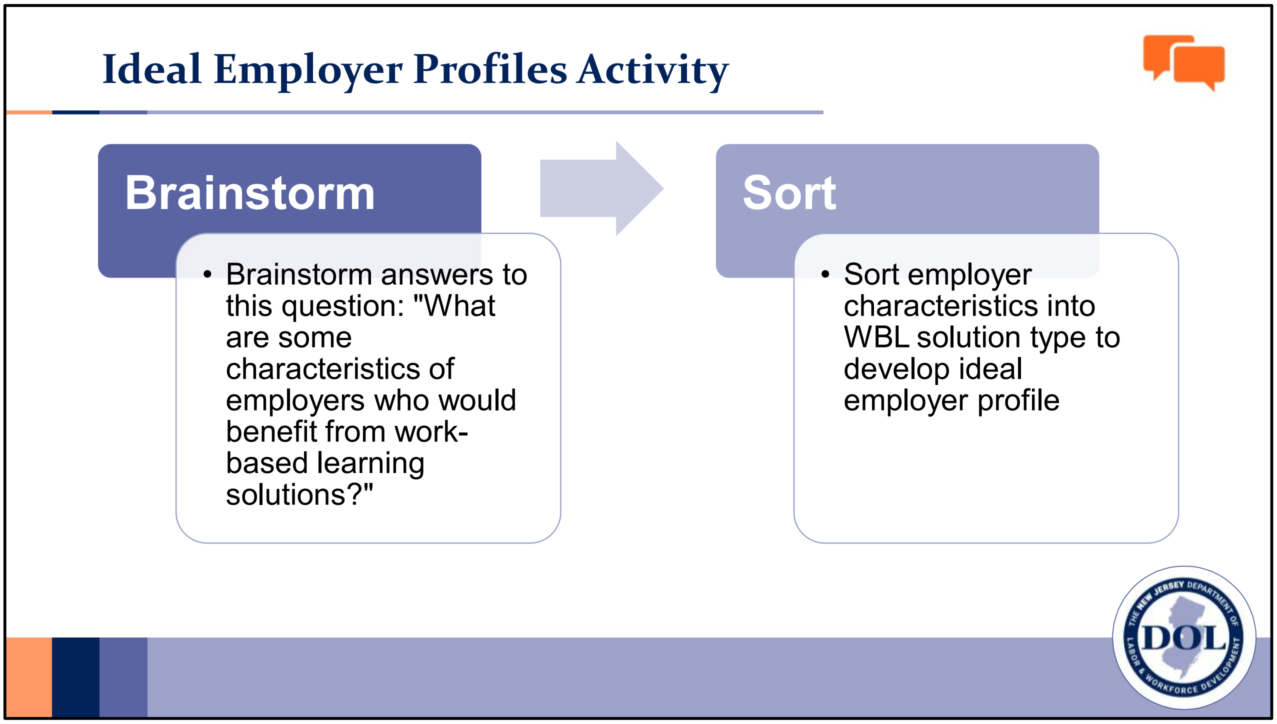
- Lead generation is an important outreach tool since it creates:
    - Visibility, credibility, trust, and interest from the employer, and
    - Increased number of potential employers.
- The goals of lead generation are to target potential employers (people who have expressed some form of interest in the product or service) and to nurture those targets until they are ready to become ideal employers.



- There are many ways to generate leads, but it really all revolves around inbound marketing. Inbound marketing is marketing that targets employers who are already interested in a particular product or service and helps convert them into a customer.
- Four different inbound marketing techniques that are used to generate leads are:
    - Email
        - Think about the number of times you have visited a website and within the first few moments a pop-up opens with a prompt to provide your email in order to sign up for exclusive discounts, product information, or a 20% off coupon!
        - This is how you can leverage an already interested person and convert them into a customer—by gaining their email information and providing them more information on your products or services.
    - Online Content
        - Blogs are one of the most popular ways to inform interested consumers on how great a product or service is—have a previous customer rave about their experience.
    - Referral Marketing
        - This technique is leveraging the connections of your existing customers. This occurs when an existing customer and the referred customer receives an incentive by referring and buying the product.
        - You see this a lot with cell phone companies—bonuses for existing customers who refer their friends and family and a bonus for the potential customer to

join.

- Social Media
  - Since the invention of social media, it has become a more and more popular way to target interested consumers and provide more information on a product or service.
  - Facebook, Twitter, and LinkedIn all have applications to assist businesses with generating and tracking leads.
  - Each of these methods should result with the company gaining the contact information of the interested individual. This allows the company to then connect with the individual about their interest in the product or service.



- It is important to understand employer need/challenges and match with most appropriate solution, instead of approaching the employer with pre-determined solutions.. Offering alternatives is also important.

Making a Strategy Activity

Working with your group in a breakout room, using “Part 2: Making a Strategy” in your handout…

Step 1

Identify employers that you have a relationship with that fit the profiles for the WBL solution types

Step 2

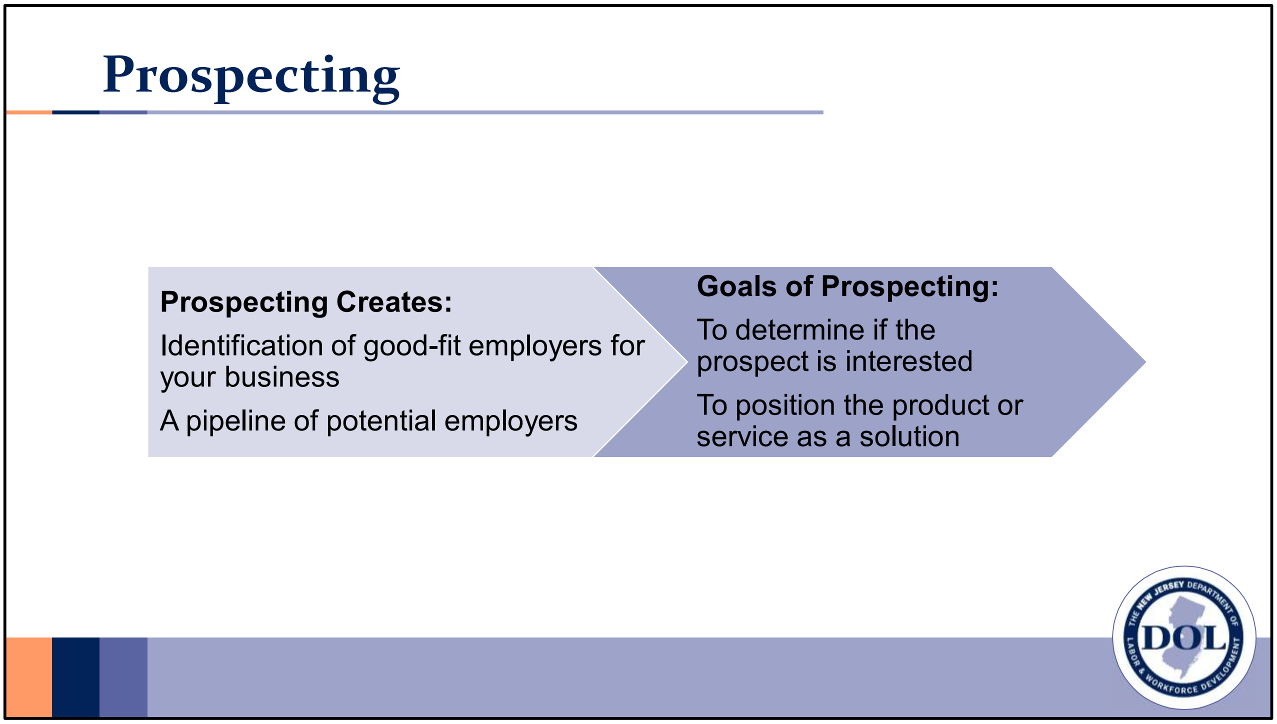
Identify potential employers that you don’t have a relationship with that fit these profiles, that you want to pursue

Prospecting

Prospect: An employer who is a potential purchaser of your product or service.

Prospecting: Identifying potential employers, outreaching to them, and converting them into ideal employers.

- Prospecting shares the same overall goal as lead generation: to create new customers.
- A prospect is an individual who is a potential purchaser of your product or service.
  - This means that prospecting is the process of identifying potential buyers, reaching out to them and converting them into customers.
  - Unlike lead generation, where the interested consumer connects with the business, prospecting is the business is reaching out to potential customers to evaluate if the individual or business is interested in becoming a customer.
- Prospecting is important because…



- Prospecting creates identification of a good-fit customer for your business and a pipeline of potential customers
- The goals of prospecting are to determine if the prospect is interested in the product or service and to position the product or service as the solution to their problem.
- There are a few important things to know *before* you prospect!

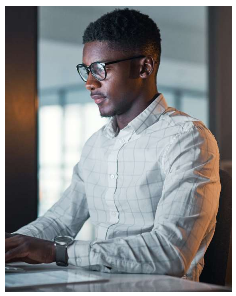
- Know your work-based learning solutions
    - Know what you are offering. Understanding work-based learning is the beginning to being able to prospect effectively. If you do not know what you are offering, how can you be effective?
    - Know the value of work-based solutions. Knowing your product or service is key to communicate the value of it to a prospect. Having a good understanding of the value of work-base learning solutions, what problems it can help alleviate, and its limitations can help you effectively connect and offer the appropriate solution.
    - Have examples ready. Employers want to know that WBL has been vetted, that it's a "tried" product, and they feel better when you have concrete examples of other employers that have used WBL successfully and effectively. *-click*

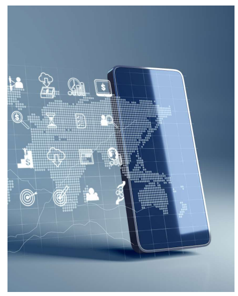
- Know your ideal customer
    - Create an ideal employer profile. What characteristics does your ideal employer have? What type of problems do they have that WBL solutions can alleviate? You need to know who you should be reaching out to in order to gauge interest.
    - Knowing your ideal employer allows you to target those individuals or companies that have the greatest chance of being interested in work-based learning, making those cold calls more productive and informative.

How to Prospect

Outbound Marketing

A traditional method of marketing seeking to push messaging out to potential customers. Consists of a salesperson reaching out to people to gauge interest.





- As mentioned previously, lead generation and prospecting have the same goal, but opposite approaches. Therefore, if lead generation is done via inbound marketing, it only makes sense that prospecting is done via outbound marketing. Outbound marketing is a traditional method of marketing seeking to push messaging out to potential customers. It consists of a salesperson reaching out to people to see if they're interested in a product or service. In our situation, this would probably look like a business services representative reaching out to an employer to gauge their need for and interest in work-based learning programs.
- Some outbound marketing methods are:
  - Cold calling
    - The solicitation of business from potential customers who have had no prior contact with the salesperson conducting the call.
    - It is an attempt to gauge potential customers interest in purchasing either the salesperson's product or service.
  - Cold emailing
    - An unsolicited email that is sent to a receiver without prior contact.
    - It is the equivalent of cold calling, but instead of calling, you are emailing.
  - Social selling
    - The practice of using a business' social media channels to connect with prospects, develop a connection with them and engage with potential leads.
    - Social selling is modern relationship-building. It is actively connecting with potential customers on social media.

- In-person/walk-ins
  - This strategy could be face-to-face networking, at an event such as a job fair or a chamber of commerce gathering. It could also involve simply walking into a company to chat with whoever is available and leave a business card or other materials.

- It is important to review what information you should be collecting to track:
  - Contact information: Name, phone number, location, job title, etc.
  - Follow-Up Dates: When are you supposed to call again or follow-up regarding the sale? Be sure to put reminders on so that you can follow-up when you said you will.
  - Potential Solutions: This is for you to forecast what solution you think is best for the client, with the limited information you have.
- A few ways that we recommend you track your leads and prospects are:
  - Email / Calendar: You can add to a calendar the contact information and meeting date and time. You can add notes to the meetings that help you keep track of information.
  - Excel: This is another great option, as you can customize to your preference. This is a great option for those who feel comfortable with Excel. You can add columns with titles for information and list out all of your contacts. You can even color-code based on where the lead or prospect is at in the process.
  - Customer Relationship Management System: This is a paid-for service, but if you can afford a CRMS, such as Salesforce, this is one place where you can store all the information you can imagine about a lead or prospect.
- When it comes to tracking leads and prospects, there are a few important goals to keep in mind:
  1. You want to stay organized.
  2. You want to be able to know where you are in the process.
  3. You want to connect your data to the work that others are doing. This looks like state and local data systems collaborating effectively!

- Once you have solid knowledge on each type of WBL, you will quickly recognize how it will benefit the employer's challenge. After speaking with the employer, and building that relationship and rapport, you can confidently present a possible solution that will best work for them.
- However, sometimes it takes time to get to the person who can make decisions!

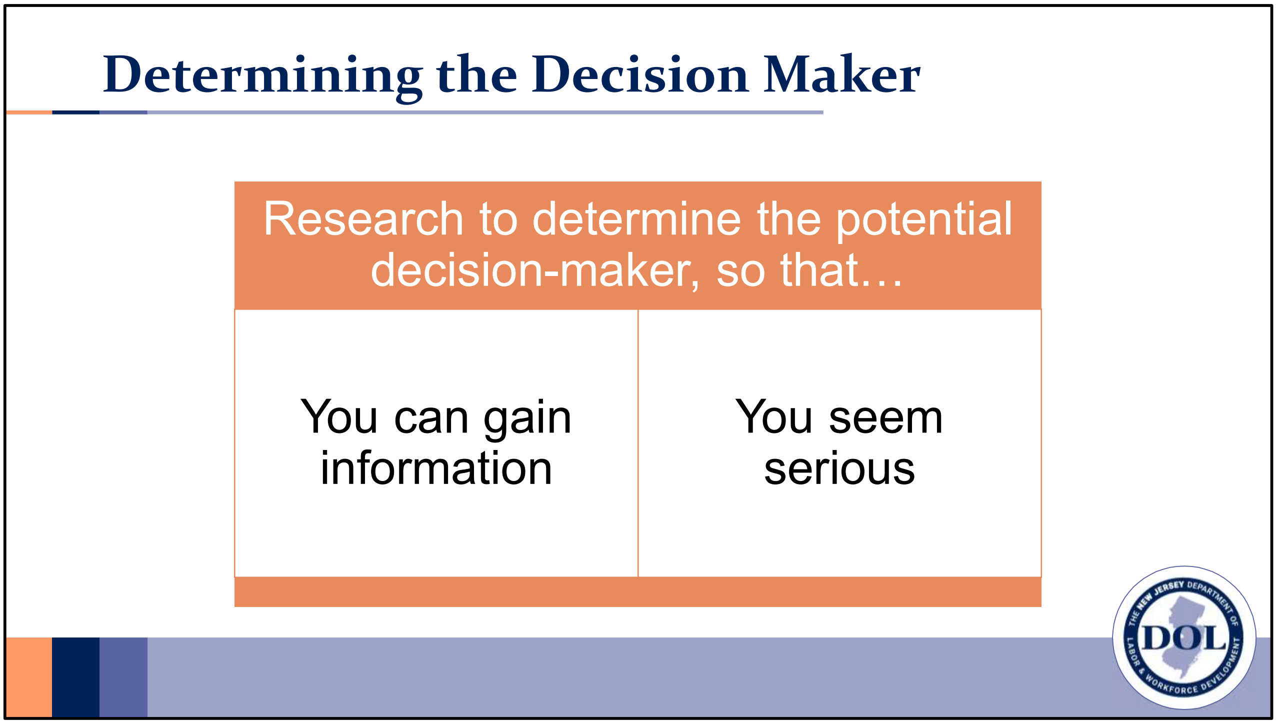
The Gatekeeper

- ✓Why does the gatekeeper exist?
- ✓What is the value of the gatekeeper?
- ✓In your experience, who are the gatekeepers when it comes to Work Based Learning?

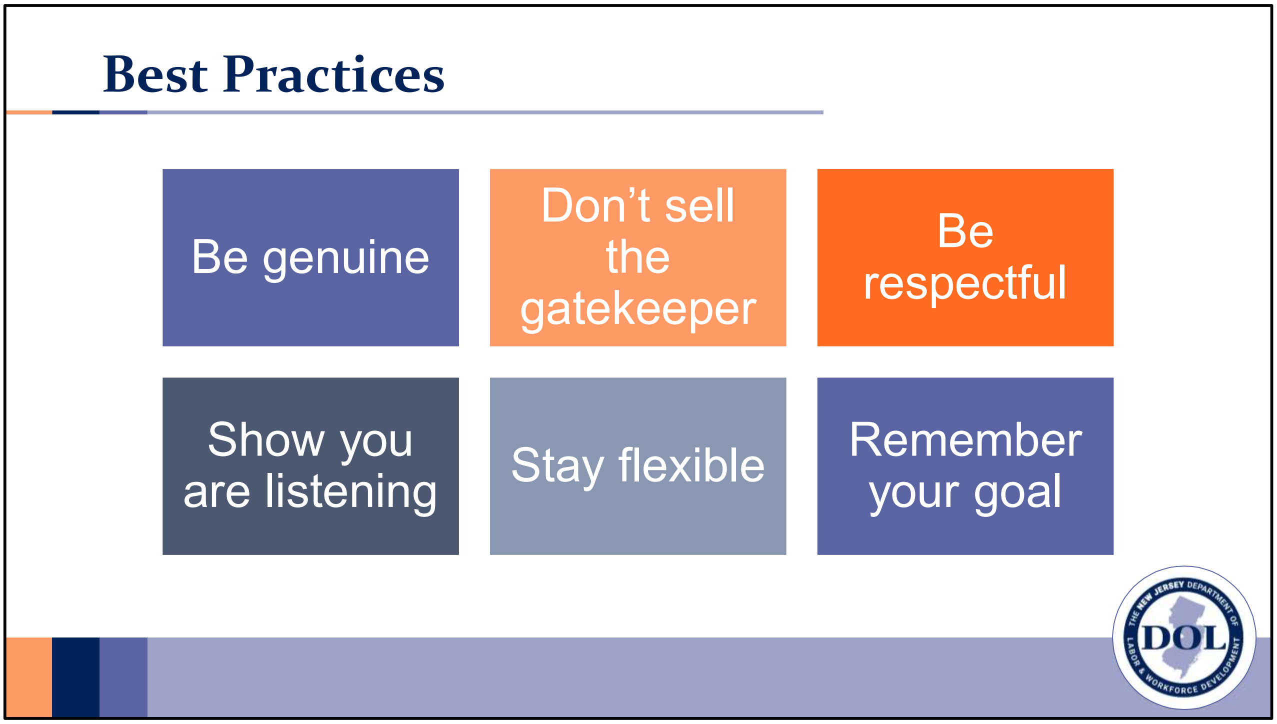
- When we say “gatekeeper,” we mean anyone who intercepts the business services representative before they speak with a company decision-maker about work-based learning. Gatekeepers are likely to have the job title of Administrative Assistant, Secretary, or Receptionist.
- It is common to struggle to get past the gatekeeper. And if you can’t get past the gatekeep to a decision maker, you will never be able to discuss challenges with the decision-maker and deliver solutions.
- Of course, you might not always need to talk to the gatekeeper. If you can talk directly to the decision-maker(s), of course that’s preferable!
- Keep in mind that the relationships that you build are going help you make that match because that employer now knows that you are focused on helping them find a solution and not just "making a sale.“

- The most effective way to build a relationship with the gatekeeper so you can reach the decision-maker is to build rapport with them.
- Open and Honest
  - First, is to always, always make sure you are being honest and having open communication. A gatekeeper is trained to sniff out lies or anything that may sound "off."
  - Being honest with the gatekeeper about what you need, can benefit you—as the gatekeeper can connect you with the correct person to help. If you are not being honest in why you are calling, or what you need, the gatekeeper will have a harder time connecting you to the decision maker because she or he will not know who can help you with your request.
- Build Trust
  - You need to earn their trust. When you say you will follow-up by a certain date, do so. Whatever you tell them your commitment or follow-through will be, make sure that you are capable of doing it and don't lead them astray. They need to trust that you are not wasting their time or would waist the decision maker's time. The quickest way to be shot down by a gatekeeper and never access the decision maker is to break any trust built with the gatekeeper.
  - Susan Young: "Trust and rapport are listed in that order because without first building trust, healthy rapport is not possible."
- Stay Professional

- Another way to build a rapport with the gatekeeper is to stay professional. You want to be friendly, but not over the top. You are not best friends, so don't act like it.
- The gatekeeper is the door to accessing the decision maker, so treat them professionally and with the respect they deserve—even if they are short with you.
- Staying professional is the best way to build a respectful rapport and earn their trust, so that they connect you with the decision maker.



- Before calling a gatekeeper, do some research to see if you can pre-determine who the decision maker may be. This can benefit you in a few ways.
  - First, if you are correct in who the decision maker is, the gatekeeper will likely confirm that and put you through to that person. If you are incorrect about who the decision maker is, the gatekeeper will likely correct you—allowing you access to information you did not have before.
  - Second, it makes you seems serious, and less like a potential waist of time. Asking the gatekeep to confirm who can help you demonstrates that you have committed your time and energy into researching the company and now you are serious enough to invest more time and energy. This reassures the gatekeeper that you are worth the decision maker's time.



- Best practices for building a relationship and rapport with the gatekeeper includes:
  - Be genuine. Remember, the gatekeeper interacts with all sorts of people, all day, every day. They have a keen sense of when someone has intentions that are different then what they disclose. So. Be honest and genuine. Tell them your intentions so that they can help.
  - Don't sell the gatekeeper. The gatekeeper is not interested in your product or service. They are responsible for managing the time of decision makers—so you need to convince them that you are worthy of the decision maker's time, not that you are selling a good product or service.
  - Be respectful. You need the gatekeeper on your side. They hold the key to accessing the individual who can buy your product or service. Treat them respectful and always stay professional.
  - Show you are listening. Actively listen to the gatekeeper. It is hard to demonstrate active listening over the phone but be sure you don't ignore what they are saying or challenge them. Paraphrase back what the gatekeeper is telling you to demonstrate that you are listening. This allows you to also confirm that you are a correct understanding of what they are communicating.
  - Stay flexible. While trying to achieve your objective—getting access to the decision maker, stay flexible with the gatekeeper. Perhaps they won't provide a phone number, but instead an email. Or maybe the gatekeeper doesn't know who can help you, so they send you to another person first. Have patience with the gatekeeper and what they are

willing and able to help you with.

- Also, be ready to walk away or not gain all the information you need. Not every call is going to be successful or productive. And that is okay—that is why you reach out to many individuals, so that at least a few can be considered a success.
- Remember your goal. Your goal with connecting to the gatekeeper should be to gain information about the company and determine who the decision maker is. Keep this goal in mind. Have a strategy going into the interaction, try to answer the question, what do I want my interaction to produce? Whatever you want your end result to be, strive for that.
- Also remember that it may take multiple calls for you to gain all the information and access to the decision maker. Each call will bring you one step closer to being able to effectively sell your product or service.

Case Study

✓Review the handout “Middlesex Business Case Study”

Case Study

CASE STUDY: Growing and improving your business in Middlesex County's welcoming economic environment

MIDDLESEX COUNTY•NJ

SunnyD
Sunny Delight Beverage Company

Background

Company: Sunny Delight Beverage Company (SDBC) located in Dayton, provides high-quality: Warehousing, pick & pack, assembly, fulfillment, labeling, packaging, freight forwarding, returns processing, and shipping.

Industry: Beverage Manufacturer.

Profile: $40 Million Dollar local economic including payroll and supply base. Holds long-term relationships within the beverage industry.

Goal: To increase their market share in the Beverage Industry which would also allow more products to be added and reduce the rising material costs while increasing the capacity to sustain jobs.

Who contacted the County:

Marc Hannon-White
Sunny Delight Business Consultant

Area of expertise – Beverage Manufacturer. Local supplier sources for key components including bottles, corrugation materials and logistics services.

Challenges

Sunny Delight Beverage Company, Dayton location:

- Lacks Lean Six Sigma Problem Solving Skills
- Flat-lined Productivity
- Eroding Competitive Edge
- Loss Of Market Share Due To Low Productivity Cost
- Excess Inventory Occupies Valuable Manufacturing Space and
- Slow To Respond Quickly To Opportunity
- Reducing the "change over" process which includes shutting a machine down to change a bottle size.

Approach

Team: Marc Hannon-White, *M. Hannon-White and Associates, LLC*, **Gabe Lavigne,** WDB Chair, **Kevin Kurdziel**, *Director, Middlesex County Office of Workforce Development*, **Diane Seavers**, Deputy Director, Middlesex County Office of Workforce Development, **Kathaleen Shaw**, *Middlesex County Office of Economic and Business Development*, **Earl Wiggley,** *former SDBC Plant Manager*, **Joe Cartier**, *Continous Improvement Manager, and* **CMB Global Partners**, *Training Provider.*

SDBC Action Plan:

- **White Belts** (Awareness) provided all team members an introduction.
- **Yellow Belts** (Active Participant) learned about and participated in Lean Six Sigma (LSS) processes like the Daily Visual Management System, Standard Work playbooks, Kaizen Events, etc.
- **Green Belts** (Engaged Leaders) are proficient at using basic LSS to improve processes. These are the leaders of the operation. They go beyond understanding the principles and regularly use tools and methods to improve processes.
- **Black Belts** (Lean Six Sigma Technical Expert) are technical experts. They help others in creating leaner processes and are part of improvements that deliver real business impact.
- **True Blue Belts** (Strategic Leaders) are certified business champions of LSS. They have the experience, knowledge, and drive to make their business area globally competitive.

Results to Date

- As a result of the Lean Six Sigma Business Management System, every worker received an industry recognized credential.
- Since embarking on the Lean Six Sigma journey, the plant has begun to standardize production by incorporating the Six Sigma principles.
- The "change-over" process includes shutting a machine down to change a bottle size. Previously, it took 35-40 minutes to complete the "change-over" process; however, it now takes 15-20 minutes. This one "change-over" process allows 110 BPM for 128oz up to 250 BPM for 40,56 & 64oz.

Key Findings and Other Considerations

- The County resource team takes pride in offering the Business Portal, CoStar real estate tools, employer hiring tax savings and a network of resources at no or nominal cost that businesses can tap
- Partnering with Middlesex County can help companies get the resources they need to evaluate internal growth, suitable facilities, location, purchase vs. lease options, tax incentives, program eligibility
- **SDBC** saved a substantial amount of time and money and gained additional revenue by using the County's IWT resources
- By educating the business community about the County's resources and services, Middlesex County as a whole will benefit and prosper

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www.middlesexcountynj.gov

Case Study

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Wrap Up

- In order to solve employer challenges with work-based learning solutions its important to both know your product and know your customer!
- Two outreach methods are **lead generation** (occurs en masse, with employer reaching out) and **prospecting** (occurs one-to-one, with workforce staff reaching out to employer).
- The gatekeeper is the person who intercepts requests of the decision-maker. To “get past the gatekeeper,” build trust and rapport.

Preview of Next Module

In **Work-Based Learning 202: Six Steps of the Sale**, we will cover a six-step strategy for meeting with decision-makers!

1. Prepare for the meeting
2. Build business rapport
3. Probe for needs
4. Present solutions
5. Handle objections
6. Confirm next steps

Upcoming WBL Training Schedule

Module 202: The Six Steps of the Sale

- Two options: Tuesday May 17th at 9am or Thursday May 19th at 1pm
- Audience is staff working with employers

Module 301: Contracts, Invoicing, and Fiscal Trackers

- Two options: Tuesday May 31st at 9am or Thursday June 2nd at 1pm
- Audience is the fiscal team **AND** staff working with employers

THE NEW JERSEY DEPARTMENT OF LABOR & WORKFORCE DEVELOPMENT

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Thank You!