



Sales Playbook

2024

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Company Values

- Commitment to providing top-quality products at affordable prices.
- Focus on dedicated, unmatched customer service.
- Building long-lasting relationships with customers.
- Maintaining strong partnerships with industry pioneers, engineers, construction professionals, and vendors.

Who We Are

Metal Building Outlet started in 1983, primarily providing farm buildings. It is a family-owned business that values quality and affordability in its products. The company is recognized as one of the nation's most trusted metal-building companies, thanks to its deep roots in the industry and a team of experienced customer service professionals.

Value Proposition

Metal Building Outlet offers quality metal buildings at affordable prices, combined with exceptional customer service. Customers receive personalized attention and guidance from experienced project managers to ensure they get the best product within their budget.

Unique Selling Points

- Decades of experience in the metal building industry.
- A strong network of industry partnerships.
- Personalized customer service with dedicated project managers.
- A reputation as a trusted, reliable metal-building company

Primary Customer Types

Buyer Persona: Equestrian (Sarah)

Demographics:

- Age: 40-60
- Industry: Equestrian/Riding Arenas

Professional Focus

Key Challenges and Objectives:

- **Facility Expansion:** Seeking cost-effective and durable solutions for expanding or upgrading existing equestrian structures.

- **Budget Constraints:** Operating within budget constraints and looking for value-for-money options.
- **Regulatory Compliance:** Needing structures that meet safety and regulatory standards for equestrian facilities.
- **Customization:** Interested in tailored designs to accommodate the specific needs of riders and horses.

How Sarah Likes to Be Messaged:

- **Personalized and Compassionate Communication:** Sarah appreciates messages that have a personal touch and understanding of the unique needs of equestrian facilities.
- **Budget-Friendly and Customization Focus:** Sarah values messages that spotlight budget-friendly options without compromising quality. Additionally, emphasizing MBO's customization capabilities, and tailoring structures to specific equestrian needs, will capture her attention.
- **Tangible Examples:** Messages should include tangible examples and case studies illustrating successful equestrian projects using MBO's solutions.

Questions for Understanding Sarah's Needs

- Needs additional outdoor runs?
- Waiting list for stall rental?
- Need hay storage?
- Would like to expand arena for events?
- What specific features are most important in her facility upgrades (e.g., ventilation, lighting, flooring)?

Integration with Client Vision and Journey:

For Sarah, MBO becomes an essential partner in expanding and upgrading her equestrian facility. Our personalized approach ensures that Sarah's vision for her facility is realized within budget constraints, meeting regulatory standards while offering customization options tailored to her needs.

Relevant Past Projects:

- [MONITOR STYLE BARNDOMINIUM IN LARAMIE, WYOMING](#)
- [STEEL BARNDOMINIUM IN FERRIS, TEXAS](#)

Personal Focus

Key Challenges and Objectives:

- **Facility Enjoyment and Expansion:** Interested in creating or expanding an equestrian facility primarily for family enjoyment and recreational purposes.
- **High-Quality and Custom Design:** Seeks high-end, customized equestrian structures that provide both functionality and aesthetic appeal.
- **Rental Income Potential:** Looking at the potential for rental income from the facility as part of retirement planning.

- **Family Involvement:** The facility may be used by family members, including children, for leisure riding and possibly small-scale equestrian events.
- **Investment in Enjoyment and Income:** MBO helps Sarah create a facility that not only enhances family enjoyment but also offers rental income opportunities, aligning with her retirement plans.

How Sarah Likes to Be Messaged:

- **Personal Touch and Understanding:** Sarah values messages that are personalized and show an understanding of her family-oriented equestrian lifestyle.
- **Luxury and Customization Emphasis:** Emphasize MBO's ability to deliver high-quality, custom-designed solutions that cater to a luxurious equestrian lifestyle.
- **Examples of Recreational Projects:** Include examples and case studies of other high-end, recreational equestrian projects that MBO has completed.

Questions for Understanding Sarah's Personal Focus:

- Is the facility intended for regular family gatherings and recreational use? Who will be using the facility?
- Does she plan to host small-scale events or competitions at the facility?
- What are her long-term goals for the facility in terms of both personal use and income generation?
- Are there particular amenities she wants to include (e.g., viewing lounges, tack rooms)?
- How does she envision the facility contributing to her retirement plans?

Buyer Persona: Car Enthusiast (James)

Demographics:

- Age: 35+

Key Challenges and Objectives:

- **Workspace Functionality:** Needs a durable, spacious environment for tinkering with cars, showcasing collections, and hosting gatherings.
- **Budget Awareness:** Seeks cost-effective building solutions without sacrificing quality.
- **Customizable Layout:** Requires a flexible space to accommodate various projects and social activities.

How James Likes to Be Messaged:

- **Practical Solutions:** Prefers straightforward communication focusing on practicality.
- **Demonstrated Durability:** Interested in seeing how buildings withstand rigorous use and provide a high-end aesthetic.
- **Quick Response:** Values prompt replies and efficient information exchange.

Questions for Understanding James's Needs:

- Is the space primarily for personal use, business, or both?
- Does he plan to host gatherings or events in the space?
- What specific customizations does he need for his car restoration activities?
- Does he need additional features such as a lounge area, display sections, or specialized lighting?
- How does he envision the layout to accommodate both work and leisure activities?
- Are there specific tools or equipment that the space needs to house?

Integration with Client Vision and Journey:

James's journey to creating the perfect man cave for his custom car restoration hobby and showcasing his collection is supported by MBO's expertise. Our practical solutions ensure that James's space is not only functional but also durable, flexible, and stylish, aligning with his passion for automotive restoration and social gatherings.

Relevant Past Projects:

- [RV STORAGE GARAGE IN MORRISON, COLORADO](#)
- [MULTI-PURPOSE METAL BUILDING IN LITTLETON, COLORADO](#)

Buyer Persona: Office Building Buyer (Michelle)

Demographics:

- Age: 40-55
- Occupation: CEO of a growing marketing agency
- Industry: Marketing and Advertising

Key Challenges and Objectives:

- **Creative Environment:** Seeks an inspiring and adaptable office space.
- **Cost-Effective Solutions:** Balances budget with the need for a modern, well-equipped office.
- **Scalable Space:** Needs a flexible space that can grow with the company.

How Michelle Likes to Be Messaged:

- **Customization:** Responds well to customizable colours and designs.
- **Clear ROI:** Interested in how the investment will benefit her business long-term.
- **Personalized Approach:** Prefers a tailored service that understands her unique business needs.

Questions for Understanding Michelle's Needs

- What specific features does Michelle see for an inspiring office environment?
- How quickly does she anticipate her company will grow, and how much additional space might she need?
- What is her budget range for the office building project?
- Does she have any specific aesthetic or functional requirements for the office space?
- Is she looking for a turn-key solution or does she prefer to be involved in the design process?

Integration with Client Vision and Journey:

Michelle's journey to creating an inspiring and adaptable office space is complemented by MBO's solutions. We collaborate with Michelle to design cost-effective, customizable buildings that grow with her company, reflecting her unique business needs and vision.

Relevant Past Projects:

- [COMMERCIAL BUILDING IN CRESTED BUTTE, COLORADO](#)

Buyer Persona: Architect (Alex)

Demographics:

- Age: 30-45
- Occupation: Principal Architect or Design Director at a progressive architectural firm
- Industry: Architecture and Design

Key Challenges and Objectives:

- **Innovative Design Challenges:** Alex faces the constant challenge of pushing the boundaries of design and finding unique solutions that set his firm apart.
- **Sustainability Goals:** Ensuring his designs align with sustainability objectives and eco-friendly practices is a top priority for Alex.
- **Collaboration Hurdles:** Building strong partnerships with reliable suppliers who understand and contribute to the creative vision of his projects can be challenging.
- **Technology Integration:** Alex aims to seamlessly integrate the latest advancements in architectural software and design tools into his projects.

How Alex Likes to Be Messaged:

- **Collaborative Approach:** MBO brings a team approach. Alex appreciates messages that emphasize collaboration and highlight how MBO can contribute to bringing his visions to life.
- **Efficiency in Design and Construction:** Highlighting how MBO's solutions streamline the design and construction process aligns with Alex's preference for efficiency.
- **Quality Assurance:** Alex is skeptical about quality and prefers name brands. He has a responsibility to recommend high-quality materials since his reputation is on the line.

Questions for Understanding Alex's Needs:

- What specific design challenges is Alex currently facing?
- What are Alex's main criteria for selecting suppliers and partners?
- How does Alex currently integrate new technology into his design process?
- What unique features or customizations does Alex require for his projects?
- How does Alex measure the success of his projects?
- What are Alex's concerns about working with new suppliers?

Integration with Client Vision and Journey:

For Architect Alex, MBO serves as a creative collaborator in pushing the boundaries of design. We provide architectural flexibility, sustainability, and seamless integration with the latest design tools, empowering Alex to bring his innovative visions to life.

Relevant Past Projects:

- [INDUSTRIAL WAREHOUSE BUILDING IN THORNTON, COLORADO](#)

Buyer Persona: Developer (Dan)

Demographics:

Age: 35-50

Occupation: Real Estate Developer

Industry: Real Estate Development

Background:

Dan has over 20 years of experience in developing residential and commercial properties. He's known for his innovative projects and strategic approach to property development.

Key Challenges and Objectives:

Rapid Construction: Prioritizes quick and efficient building methods to keep projects on schedule.

Investment Value: Focuses on high ROI developments.

Versatility: Seeks flexible building solutions to cater to a diverse range of projects.

How Dan Likes to Be Messaged:

- Emphasize speed and efficiency of construction.
- Showcase past successful projects with high ROI.
- Highlight versatility and customization options.

Questions for Understanding Dan's Needs:

- What types of properties (residential, commercial, etc.) is Dan currently focusing on?
- What are Dan's primary criteria for choosing building solutions?
- How critical is the speed of construction for Dan's current projects?
- What specific customization needs does Dan have for his projects?
- How does Dan measure the ROI of his developments?
- What are Dan's long-term development goals?
- How has Dan's experience been with previous building suppliers?
- What features or capabilities are most important to Dan in a building solution?
- How does Dan manage budget constraints while aiming for high ROI?

Integration with Client Vision and Journey:

Dan's journey in property development is accelerated by MBO's focus on speed, efficiency, and versatility. Our solutions showcase past successful projects with high ROI, highlighting how MBO buildings contribute to Dan's strategic approach to property development.

Relevant Past Projects:

- [COMMERCIAL METAL BUILDING IN COLUMBIA FALLS, MONTANA](#)

Buyer Persona: Investor (Isabel)

Demographics:

Age: 40-60

Occupation: Property Investor

Industry: Real Estate Investment

Background:

Isabel invests in a variety of properties, including commercial and industrial real estate. She has a keen eye for properties that offer long-term value.

Key Challenges and Objectives:

Long-Term Value: Look for investments that promise sustainable returns.

Low Maintenance: Prefers properties that require minimal upkeep.

Market Trends: Stays informed about the latest real estate trends to make educated investment decisions.

How Isabel Likes to Be Messaged:

- **Focus on Long-Term Value and Durability:** Emphasize the enduring quality and sustainability of MBO buildings. MBO buildings are designed for longevity, ensuring a steady return on investment over time.
- **Highlight Low Maintenance and Operational Efficiency:** Stress the low upkeep needs and efficiency of MBO's structures.
- **Discuss Market Trends:** Explain how MBO buildings align with current and future real estate trends.

Questions for Understanding Isabel's Needs:

- What types of properties does Isabel currently have in her investment portfolio?
- What criteria does Isabel use to evaluate potential investments?
- How important is building durability and low maintenance to Isabel's investment strategy?
- What are Isabel's long-term investment goals?
- How does Isabel stay informed about market trends, and what trends is she currently focused on?
- What are Isabel's specific requirements for commercial and industrial properties?
- How does Isabel assess the potential ROI of a property?
- Is Isabel interested in sustainable or eco-friendly building options?
- What are the common challenges Isabel faces with her current properties?
- How does Isabel balance initial investment costs with long-term value?

Integration with Client Vision and Journey:

Isabel's investment journey is fortified by MBO's emphasis on long-term value, durability, and low maintenance. We align with Isabel's market trends, offering buildings that promise sustainable returns and fit seamlessly into current and future real estate landscapes.

Relevant Past Projects:

- [METAL BUILDING IN SAN FERNANDO CITY, LA UNION PHILIPPINES](#)

Buyer Persona: Erector (Eddie)

Demographics:

Age: 30-45

Occupation: Building Contractor

Industry: Construction

Background:

Eddie owns a construction company specializing in erecting metal buildings. He values quality, efficiency, and reliability in his projects.

Key Challenges and Objectives:

Build Quality: Needs high-quality, reliable building materials.

Efficient Construction: Looks for buildings that are easy and quick to erect.

Supplier Reliability: Seeks dependable suppliers with consistent product quality.

How Eddie Likes to Be Messaged:

- **Emphasize Quality and Reliability:** Highlight the superior quality and reliability of MBO buildings.
- **Detail Construction Efficiency:** Explain how MBO buildings are designed for ease and speed of erection.
- **Showcase Testimonials and Case Studies:** Provide examples of satisfied customers and successful projects to demonstrate reliability and customer satisfaction.
- **Prioritize Service Support:** Emphasize MBO's commitment to addressing service issues, managing shortages, handling fitness claims, and providing replacement parts efficiently.

Questions for Understanding Eddie's Needs:

- What types of metal buildings does Eddie typically erect?
- How important is build quality to Eddie's reputation and business?
- What specific features does Eddie look for to ensure construction efficiency?
- Has Eddie faced issues with supplier reliability in the past? If so, what were they?
- What are Eddie's key criteria for choosing a building materials supplier?
- How does Eddie handle service issues, such as shortages, fitness claims, and replacement parts?
- What are Eddie's most significant challenges when it comes to project timelines?
- How does Eddie ensure that his projects stay on budget?
- Is Eddie interested in sustainable or eco-friendly building materials?
- How does Eddie assess the long-term durability of building materials?

Integration with Client Vision and Journey:

For Eddie, MBO's solutions become synonymous with build quality, efficiency, competitive pricing, and supplier reliability. We ensure that Eddie's construction projects are executed with high-quality materials, efficient construction processes, and dependable supplier partnerships, reinforcing his reputation for reliability in the construction industry.

Relevant Past Projects:

- [STEEL BARNDOMINIUM IN BRECKENRIDGE, COLORADO](#)

Buyer Persona: Contractor (Carl)

Demographics:

- Age: 35-50
- Occupation: Owner and Operator of a mid-sized construction company
- Industry: General Contracting and Construction

Key Challenges and Objectives:

- **Project Efficiency:** Carl is always seeking ways to improve project timelines and overall efficiency. He values streamlined processes that reduce construction time without compromising quality.
- **Cost Management:** Operating within budget constraints is crucial for Carl. He seeks cost-effective solutions that maintain profitability without sacrificing craftsmanship.
- **Skilled Workforce:** He values subcontractors and suppliers who can consistently deliver quality materials and services.

How Carl Likes to Be Messaged:

- **Direct Communication:** Carl prefers straightforward and clear communication.
- **Solution-Oriented Messaging:** Messages that highlight how MBO's solutions address his specific challenges will resonate with Carl.
- **Demonstration of Value:** Case studies and examples of successful projects using MBO's metal buildings will capture Carl's attention.

Questions for Understanding Carl's Needs:

- Why does Carl need a building?
- Is he outgrowing an existing building?
- Did he buy new land? Is he renting or leasing now?
- Does he have no work outside of hauled in equipment to equipment dealer?
- What are his future growth plans for his construction company, and how can MBO support this growth?
- What are the common feedback or complaints from his workforce regarding current building solutions?

Integration with Client Vision and Journey:

Incorporating MBO into Carl's journey means enhancing project efficiency while maintaining quality. We'll work with Carl to streamline processes, reduce construction time, and deliver cost-effective solutions that elevate his craftsmanship.

Relevant Past Projects:

- [Discounted buildings](#)

Onboarding Plan

[Start with this document](#)

Buyer Acumen

Buyer Acumen = deep understanding of your buyers

So you **MUST** know their:

- Roles and Goals

- At MBO, these will largely be... See Buyer Personas
- See Buyer Personas
 - See above.
- COIN-OP
 - Challenges they are facing. For example,
 - **Contractor:** Focused on project efficiency, cost management, and a skilled workforce.
 - **Equestrian Facility Owner:** Seeks cost-effective, durable solutions for facility expansion with a focus on customization and regulatory compliance.
 - **Office Building Buyer:** CEO seeking an inspiring, adaptable, and cost-effective office space that can grow with the company.
 - **Shop Building Owner:** Needs a durable, spacious environment for car restoration projects with a focus on budget and customizable layout.
 - **Principal Architect:** Aims to push design boundaries, focus on sustainability, improve collaboration, and integrate technology.
 - **Real Estate Developer:** Prioritizes rapid construction, investment value, and versatility in building solutions.
 - **Property Investor:** Looks for long-term value, low maintenance, and investments informed by market trends.
 - **Building Contractor:** Focuses on build quality, efficient construction, and supplier reliability.
 - Opportunities they are looking to/can capitalize on.
 - Each persona can capitalize on MBO's tailored, cost-effective, and durable building solutions to overcome their challenges.
 - Impacts both positive and negative of their challenges and opportunities.
 - **Positive:** Improved efficiency, cost savings, regulatory compliance, customization, and sustainable building practices.
 - **Negative:** Without the right solutions, they may face delays, overspending, non-compliance, and sustainability shortfalls.
 - The needs that are created by their specific situation.
 - Needs include efficient project management, budget-friendly solutions, compliance with regulations, and customizable designs.
 - The otcomes they consider desirable.
 - Desirable outcomes are streamlined operations, enhanced profitability, compliance ease, and personalized solutions that fit each persona's unique requirements.
 - The priorities in those needs/outcomes.
 - Priority varies by persona but generally includes efficiency, cost-effectiveness, customization, and sustainability.
- Their Buyer's Journey
 - The typical prospective buyer:
 - Activities

- Research for best-in-class solutions, seek testimonials or case studies and engage in direct communications for personalized solutions.
 - Motivations
 - Driven by the need to solve specific challenges, improve profitability, and achieve project and business goals.
 - Emotions
 - Seeking confidence in decision-making, reassurance of investment value, and satisfaction from achieving desired outcomes.
 - Barriers
 - Budget constraints, lack of customizable options, regulatory hurdles, and sustainability concerns.
- Personal Factors
 - Are there any emotional and/or other personal factors that could be on the playing field?
- Value Creation
 - How does the buyer define value and why?

Buyer Acumen Fill in Chart:

Need to Know	Why	Answer	Additional Info
Roles and Goals	<i>To grasp who your usual decision makers, stakeholders, and influencers are and what they are looking for. Ex. Schools or Non-Profits that need to safely bring on more volunteers.</i>		
Buyer Personas	<i>What kind of person is buying from us and how can</i>		

	<i>we tailor and personalize our message to them?</i>		
COIN-OP	<i>Challenges they face, the Opportunities they can capitalize on, the Impacts (positive or negative) of those challenges and/or opportunities, the Needs their situation creates, their desired Outcomes, and the Priorities of those needs and outcomes)</i>		
Metrics	<i>How are they measured? What metrics matter most to them? How do they define success in their role?</i>		
Budgets	<i>What are their typical budgets, their span of control, and their purchasing authority?</i>		
Buyer's Journey	<i>Who do they interact with internally during the process? What are common decision criteria? How</i>		

	<i>do your buyers make their final decisions?</i>		
Company Size	<i>If it applies, in what size company and/or verticals do they typically work?</i>		
Other Pressures	<i>Outside of you, what might influence your buyers?</i>		
Personal Factors	<i>What emotional, personal factors, or personal needs might influence your buyer?</i>		
Value Creation	<i>How do they define value? Business Value, Aspirational Value, Experiential Value, and/or personal value?</i>		

Sales Process & Cycle

This section will walk you through the stages of the sales process and holds best practices and helpful materials.

New Opportunity

- Identify potential leads from various sources such as inbound(verified by Charlie before being assigned), outbound outreach, and referrals.
- Conduct initial outreach to gauge interest and qualify the lead's potential as a client for MBO.
- Use CRM to track and manage leads effectively. Once a lead has been called they will be moved to the next stage.

Contact and Qualify

- At this point, the goal is to receive a response from the lead, indicating their interest in purchasing a building.
- Emails in this [playbook](#) should be used for efficiency.

Objectives:

- Qualify potential clients to ensure the right fit including project requirements and budget.
- Initiate contact and book a meeting with potential clients.

Sales Actions:

- Qualifying call
- Introduction and Value-based emails highlighting the benefits of MBO's buildings.
- Call-to-action emails prompt recipients to book a meeting.
- Follow-up calls to leads who have engaged with emails.

Exit Criteria:

- Get a response and book a meeting.

Qualified to Buy

The lead has now been qualified.

Objective:

- Provide qualified leads with relevant information about MBO's offerings and services tailored to their project.

Sales Actions:

- In this stage send the brochure and drawings email tailored to the lead's needs. Highlight MBO's value proposition using emails and corresponding calls.
- Generate a new quote tailored to the lead's specifications and requirements for their metal building project.
- Send the quote to the lead for review and sign-off.
- Address any questions or concerns the lead may have regarding the quote and guide the lead through the signing process to finalize the agreement.

Exit Criteria:

- Once the lead signs the quote, the system will automatically log that activity and notify you. It will be moved to Quote Accepted - Requesting Order Approval.

Quote Accepted - Requesting Order Approval

Objective:

- Start the process of obtaining order approval from the customer.

Sales Actions:

- Ensure the appropriate vendor is assigned for the project.
- Determine whether the order type is Plans Only or Production Order.
 - If applicable, initiate packet generation based on the order type.
- Ensure the deposit is received and logged in the system.
- **Complete Approval Checklist:** Verify all necessary details, attachments, and agreements are in place before proceeding.

Exit Criteria:

- The deposit has been received and logged in the system.
- The approval checklist is completed, confirming all required information is accurate and accounted for.

The deal is advanced to management for final approval or rejection.

Order Approved - Submit 1st Half Payroll

Once the purchase order is submitted for approval, it enters the managers' Approval Queue. Once approved, the purchase order progresses to Stage 6, If rejected, the purchase order returns to Stage 4, triggering a notification for further action.

Approved Active Sale

Once the quote has been approved the deal is officially an active sale!

Objective:

- Update the deal record with the tentative dates provided by the vendor and ensure all information is accurately logged in the CRM.

Sales Actions:

- Log tentative dates from the vendor for the project and update the corresponding date fields on the deal record in the bottom left section upon receipt.
- Ensure all vendor emails regarding tentative dates are logged to the deal record. Utilize integrated email tools for automatic logging whenever possible. Confirm All Known Dates: **start date, delivery date, and completion date** are "known" and updated in the CRM.
 - Manual Logging: If necessary, manually log emails by forwarding them to 23973426@forward.hubspot.com, include the PO# of the deal in the subject line for immediate association.
- Keep customers engaged by using emails from the active sale templates. regarding the timeline and deliverables.

Exit Criteria:

- All tentative dates provided by the vendor are updated in the corresponding fields on the deal record.
- Once all three dates (**start date, delivery date, completion date**) are "known" and updated in the CRM deal will be moved to the next stage.

Date Confirmations

Objective:

- Ensure accurate and timely confirmation of delivery dates with vendors and customers, and follow-up.

Sales Actions:

- Generate an email using [a template or the snippets](#) and send updates to the customer.
- Follow up with the customer via phone call to provide additional support or clarification. Track this in the CRM.
- Call the customer on the date of delivery to obtain a verbal review of the service provided.
- Confirm the delivery date with the vendor and document validation in the deal record.
 - If the delivery date remains unchanged, add a note to the deal record documenting the validation date.
 - If the delivery date is changed, update the delivery date in the record and add a note documenting the validation date.

Exit Criteria:

- All date confirmations are completed and documented in the deal record, ensuring seamless coordination and communication with vendors and customers.
- Schedule a follow-up email to launch at 7 pm on the day of delivery to ensure continued engagement with the customer.

Plans Confirmations

After project plans are received, an Admin will update the 'Digital Plans Received' field and upload the document to the deal record. This field is only editable by admin. If the deal is not a 'Plans Only' deal, the Drawings Approval Sequence will be initiated.

Sales Actions:

- Review and confirm the plans with the customer, seeking their approval before production.

Submit Change Orders

If a change order is required, Sales reps must first manually assign them to this stage and identify the type of change requested.

Objective:

- Effectively manage any changes requested by the customer during the project execution phase through the formal change order process.

Sales Actions:

- Address any change requests from the customer promptly and assess their impact on the project.
- Obtain approval for change orders and adjust the project plan accordingly to accommodate the requested changes.
- Manually assign change orders to this stage and specify the type of change requested.
- Verify the changes with the customer via call.
- Notify the vendor of the changes to the order.

Exit Criteria:

- The deal is automatically pushed back to the Plans stage to ensure seamless implementation of the updated project plan.

Active Production Order

Monitor project progress, update the customer regularly, and address customer inquiries promptly. The deal moves to the next stage when the building is ready for delivery to the customer.

Confirm Delivery & Close

- Send [delivery procedure](#) email and attach delivery instructions.

Disqualified

If a lead is determined to be unsuitable for MBO's services or does not meet the qualification criteria, classify them as disqualified and discontinue further contact.

Closed-Lost

Not every project succeeds, but it's important to learn from losses. Use this deal to understand what didn't go as planned, refine your strategies, and turn this experience to do better for future success. Prospect can be enrolled in the [nurture sequence](#) if you believe they can be a customer in the future.

Closed-Won

Congratulations! All your efforts have paid off. Your hard work, planning, and great communication have led to success. Remember, maintaining a good relationship with them can lead to valuable referrals in the future.

- Send [feedback and review](#) email

On Hold

- Pause communication with leads that require further clarification or evaluation.
- Create a plan for re-engagement or follow-up based on the resolution of any issues or concerns. Dependent on the reason enroll in [nurture sequence](#).

For more information visit the [Process Stage by Stage playbook](#)

For how sequences and emails can be used through the stages view the [MBO Sequence Stages Flowchart](#)

Reporting & Key Performance Indicators

Rep Metrics

- # of calls
- # of emails
- # of sequence enrolls
- Speed to lead
- Qualified Appointments Booked
- SQL (Sales Qualified Lead) → Customer
- Number of Accounts worked

Program Metrics

- MQL (Marketing Qualified Lead) → Customer
- Conversion by forms/collateral
- Incoming leads (SQL) & (MQL) Volume
- Show up rate
- Email Open Rate
- Email Click Rate
- Email Response Rate

Qualification Guide

Qualification Criteria

Project Interest and Requirements:

- What type of building project are you considering? (e.g., warehouse, garage, commercial, residential)
- What do you want the building to do? Any specific functions or purposes in mind?
- What are the dimensions or size requirements for the building project?
- Any particular looks or styles you're going for with the building?
- How soon are you hoping to get this project done? And have you sorted out all the permits and approvals yet?
- What is your budget range for the building project?
- Are there any particular features or customizations you require for the building?
- What is your level of familiarity with metal buildings and construction processes?

Decision-Making and Stakeholders:

- Who are the key decision-makers or stakeholders involved in the project?
- Any regulations this building needs to follow?

Industry Experience and Goals:

- Have you worked on similar building projects in the past?
- Why metal buildings? What got you interested in working with MBO?

Best Practices

- **Ask Open-ended Questions:** Use open-ended questions to encourage leads to elaborate on their requirements and goals. This will provide deeper insights into their needs.
- **Documentation:** Document all relevant information gathered during the qualification process in the CRM system for future reference and analysis.
- **Active Listening:** Listen attentively to the lead's needs, concerns, and objectives. Take notes to ensure you capture all relevant information.
- **Timeline:** Determine the lead's timeline for making a purchase decision and project completion to set realistic expectations. If they
- **Decision-Making Process:** Understand the decision-making process within the lead's organization to anticipate potential roadblocks and stakeholders involved.
- **Budget Considerations:** Discuss budget constraints early in the conversation to ensure alignment between the lead's budget and Metal Building Outlet's pricing.

Objection Mastery

Objections are a natural part of the sales journey, but they don't have to be roadblocks. They're opportunities to engage, clarify, and ultimately close the deal. Here are some best practices on how to effectively overcome objections.

Best Practices

Anticipate Common Objections: Objections aren't personal attacks but rather indications of uncertainty or concerns. See them as feedback to respond positively. Be ready for common concerns leads might have about metal buildings. Get your answers prepared ahead of time. Refer to the list below of common objections.

Clarify Objections: Listen attentively when a prospect raises an objection. Don't interrupt. Let them express their concerns fully to gather valuable information. Ask questions to make sure you understand exactly what's the objection. Clear communication is key.

Empathize and Acknowledge: Show empathy and understanding of the prospect's perspective. Acknowledge their concerns to build rapport and trust. Dig deeper to understand the underlying issue. Use open-ended questions to prompt the prospect to share more.

Use Social Proof: Once you've identified the root of the objection, offer relevant information and solutions. Showcase how Metal Building Outlet's products or services can address their concerns. [Past projects](#) with similar issues can be shared on how MBO has resolved similar concerns. Providing examples of past projects similar to the prospect's situation can instill confidence and demonstrate the effectiveness of Metal Building Outlet's solutions.

Provide Solutions: Offer solutions or alternatives to address the lead's objections and demonstrate flexibility in meeting their needs.

Overcome Resistance: Identify underlying reasons for resistance and address them proactively to move the conversation forward.

Follow Up: After addressing the objection, follow up with the prospect to ensure their concerns have been resolved. Keep the conversation moving forward.

Common Objections

Objection: We're concerned about the cost-effectiveness of metal buildings compared to traditional construction methods.

Response: Metal buildings are more budget-friendly than traditional ones. They save on materials, go up faster, and don't need as much upkeep. Additionally, our team can help you optimize your building design to maximize cost-effectiveness without compromising on quality or functionality.

Objection: We've had negative experiences with metal building suppliers in the past.

Response: We're sorry to hear about your past experiences. At Metal Building Outlet, we prioritize customer satisfaction and strive to deliver exceptional service at every stage of the project. Our team is committed to addressing any concerns or issues promptly and transparently, ensuring a smooth and successful experience for our clients.

Objection: We're concerned about the durability and longevity of metal buildings.

Response: We understand your concern. Our buildings meet the highest standards of quality and durability. Our buildings withstand various weather conditions.

Objection: We're worried about the customization options available for metal buildings.

Response: Customization is a key aspect of what we offer at Metal Building Outlet. We work closely with our clients to understand their unique needs and preferences, offering a wide range of customization options, including colors, finishes, and architectural features. Our goal is to deliver a building that meets your exact specifications and exceeds your expectations.

Are there any other common objections that should be added to this list?

By anticipating objections, listening actively, empathizing with prospects, and providing tailored solutions, our sales team can address concerns effectively and close deals. Remaining calm, professional, and positive is key, viewing objections as opportunities for growth. Continuous improvement through training and practice ensures our team is equipped to handle objections confidently, serving clients and growing our business.

Proposal Creation

- a. Proposals are created to address the specific needs of all stakeholders at a prospective client. The goal of the proposal is to highlight value, customized building for the client's projects, understanding of their unique set-up & the pricing that fits their needs.
- b. Proposals should always be created in a document tracking system like PandaDoc for efficiency. This will allow for faster & more accurate document creation by keeping the standardized elements & agreed formats as templates. It also allows sales to see when a document has been opened & reviewed thus allowing for sales to promptly follow-up to speed up the sale.
- c. Proposals must always be reviewed and cleared by leadership to ensure all elements are situated effectively & pricing is correct. Please take special note you will be held to the promises in these documents therefore take great care in reviewing & editing before sending them to the customers.

Selling Value

Value creation for our customers begins with an understanding of their needs, the voice of their customers (what is quality to them), past experiences, and future goals. Building trust with

potential clients involves demonstrating our value through knowledge, solution orientation, industry understanding, a positive attitude, and the ability to think on our feet.

Best Practices:

- **Understand Customer Needs:** Listen actively and ask probing questions to uncover client pain points and objectives. Record these details in client profiles for future reference.
- **Demonstrate Expertise:** Showcase your expertise and industry knowledge to instill confidence in potential clients. Position yourself as a trusted advisor who can provide valuable insights and solutions tailored to their specific challenges. Use past projects to demonstrate expertise.
- **Align with MBO's Values:** Communicate and exemplify Metal Building Outlet's values and commitment to excellence in every interaction with clients. Emphasize how our values align with their goals and aspirations.
- **Focus on Relationship Building:** Prioritize building strong, long-term relationships with clients based on trust, transparency, and mutual respect. Invest time in nurturing these relationships and demonstrating ongoing support and commitment.
- **Highlight Product Value:** When presenting our buildings, emphasize the value they bring to the client. Focus on how our solutions meet their needs and provide concrete advantages. Avoid overwhelming them with technical details. Instead, highlight what the building can achieve for them, rather than individual features.

Resources:

- [7 Key Principles of Value-Based Selling](#)

Daily Method of Success

SDRs

Morning Routine:

- Start the day by checking your email and CRM to ensure any urgent tasks or customer outreach are addressed promptly.
- Ensure all calls have been followed up and any additional forms are sent out for customers. Use [templates](#) in HubSpot for standardization and efficiency.
- Review LinkedIn activity to see who has viewed your profile or sent invites, and allocate time for prospecting individuals in MBO's target industries or engaging with previous customers. Track these customers through the preferred partner program

Focused Prospecting Time:

- Dedicate a 2-3 hour time block for prospecting, calling, emailing, and seeking referrals from previous clients. Call to qualify incoming leads and learn their wants and needs to generate their vision through estimating software.

- Prioritize calling according to time zones, starting with regions in the East and progressively moving West throughout the day.
- Minimize interruptions during this prime calling time to maximize productivity and achieve KPIs.

Lunch: be sure to rest and take a break. Get some movement in your body as well. It is highly beneficial to keep yourself focused and ready.

Afternoon Outreach:

- Allocate 1-2 hours for a combination of email outreach and follow-up calls, ensuring prompt responses to any inbound leads.
- Maintain a balance between email communication and active calling to engage leads in a personal manner.

End-of-Day Reporting:

- Conclude the day by logging all activities, including calls made, emails sent, responses received, and any encountered issues. Updating the CRM is crucial to
- Reflect on the day's successes and challenges to identify areas for improvement and celebrate achievements.

Collaboration and Feedback:

- If needed, connect with your sales manager or fellow SDRs to troubleshoot challenges and share insights from the day's interactions.
- Utilize team collaboration to brainstorm strategies for overcoming obstacles and optimizing performance.

Example SDR Time Blocked Day:

8AM - 10AM: Prospecting

10AM - 12PM: Call Block #1

12PM - 1PM: Lunch

1PM - 4PM: Call Block #2, reply to emails

4PM - 5PM: List Building, Update CRM, Fill Out End of Day Report

CRM Protocols

Following our protocols ensures seamless communication, maintains data accuracy, and drive progress through the sales pipeline. These protocols serve as a reliable guide to navigate the customer journey effectively.

Qualification Questions & Research :

- It is important to document all qualification questions asked during customer interactions and any relevant research findings. This ensures a comprehensive

understanding of each customer's needs and preferences and can be referred back to.

- Make the most of custom properties in our CRM for deeper insights.

Log All Calls & Interactions:

- Every communication with customers, whether it's a phone call, email, or in-person meeting, should be logged. This includes details of the conversation, action items discussed, and any follow-up steps agreed upon.
- Learn how to input data correctly, follow pipeline and sales processes, and maintain consistency.

Keep Pipeline Stages Up to Date:

- Maintain accuracy in pipeline management by regularly updating the stage of each customer in the sales process. This provides visibility into where each customer stands and facilitates effective decision-making and prioritization.

Hit Activity Metrics by Recording Them:

- Consistently meet activity metrics by diligently recording all customer interactions, including calls made, emails sent, meetings scheduled, and other relevant activities. This ensures accountability and helps track progress towards sales goals.

Resources:

- Course: [HubSpot CRM Training](#)
- Course: [How to Use CRM for Segmentation](#)
- Course: [How to Manage and Clean Data](#)
- Course: [How to Qualify a Lead: The Complete Guide](#)

Color Sheet Usage

1. Prepare for Sending Documents

- Ensure that you are logged into PandaDoc. If you're not, the system will prompt you to log in when you attempt to create a document.
- Make sure you have the correct PandaDoc account details, as mentioned in the conversation, these might be shared via chat or email.

2. Access PandaDoc Templates

- In PandaDoc, navigate to your templates. These are pre-configured documents set up for various purposes, such as color selection forms. You'll notice a color selection form folder. This is where all of the color selection form templates reside.
- Select the appropriate template for your needs. In the context of the transcript, it would be a color selection form.

3. Create Document with HubSpot

- The integration allows you to send these forms directly from HubSpot, linking the document to a specific deal or contact.
- In HubSpot, go to the deal or contact record where you want to attach the document.
- Scroll to the PandaDoc module and click "Create Document" to initiate the process.

4. Select and Customize the Document

- Choose the correct document template for your needs, such as a color selection form.
- Assign the document to the correct contact associated with the deal. This ensures the form is sent to the right person.
- Customize the document as needed, such as pre-filling certain fields or adjusting the document name for clarity.

5. Send the Document

- Once the document is ready, you can send it directly via email through PandaDoc or generate a link to the document that you can send manually. This flexibility allows you to maintain ongoing email threads or conversations with your clients.

6. Track and Manage Responses

- Once sent, the document's status can be tracked within HubSpot in the deal or contact record under the PandaDoc module.
- When the recipient fills out and signs the document, the information is automatically updated in HubSpot, providing a seamless integration between receiving the filled-out form and updating the respective deal or contact record.

7. Follow-up and Support

- If there are any questions or issues with the process, it's encouraged to report them through the appropriate channels, such as management or support requests within HubSpot.