

The SME Agency

Just **Williams**



Sales | Marketing | Events



Sales | Marketing | Events



Today's Agenda

- Sales Strategy Development
- Defining your Ideal Customer Profile and Prospect Process
- Why Relationships Matter More than Ever
- The Art of Communication
- Creating Sustainable Sales through Customer Lifetime Value
- Maximising Customer Lifetime Value (CLV)
- Aligning Sales and Marketing
- Managing Opportunities and Pipelines
- Building a Repeatable Process for Growth



Name: Jessica Williams

Specialism: Strategic Sales, Sales Psychology, Connectivity, Business as a Force for Good.

Values: Adventure / Nurture / Growth

Proudest Moments: 65K / B –Corp / Mont Blanc / 13 Marathons and Ultras / 5512 Delegates

Just Williams Overview: Just Williams is a people-focused training, mentoring and business growth partner, helping start-ups, SMEs and professionals build stronger relationships, improve communication and achieve sustainable growth through effective sales and marketing practices.

Also: Chair Stockton Business Board, Co-Chair B-Local NE, NED, Mentor, Facilitator, Daughter, Sister, Auntie, Friend

Outside of Work: DBA / House Renovations / Hiking / Yoga / Friends and Family time / Alpine Challenge / Charity Challenges



Sales | Marketing | Events



Sales

Turning conversations into lasting relationships.

Sales is about understanding people, creating **value** and helping our clients achieve their goals.



What great sales looks like

- ✓ Listen first, understand deeply
- ✓ Add value at every stage
- ✓ Be consultative, not transactional
- ✓ Build long-term partnerships
- ✓ Drive results for our clients



People

It's about relationships, empathy and trust.



Purpose

Solve real challenges and create impact.



Process

A clear, repeatable process drives consistent results.



Performance

Measure, learn and keep improving.

Sales Strategies Toolkit

Establish the key aspects that drive **profitable growth**.

Use this toolkit to understand your business performance, identify opportunities and shape the right strategies for sustainable and scalable success.



1 NUMBER OF EXISTING CLIENTS

The size of your current customer base.



2 AVERAGE NUMBER OF PRODUCTS AND OR SERVICES HELD

The depth of your relationships and cross-sell potential.



3 AVERAGE SPEND

The typical value of each customer relationship.



4 AVERAGE MARGIN MADE

The profitability of your products and or services delivered.



5 CUSTOMER LIFETIME VALUE

The total value a customer brings over the lifetime of the relationship.



6 SECTOR SPREAD

The industries you operate in and the balance across your portfolio.



7 RETENTION RATE

The percentage of customers you keep and grow over time.



8 CONVERSION CYCLE

The typical time from first engagement to becoming a customer.



Understand the numbers. **Identify the patterns.** Take action.

A clear view of these key aspects will help you focus your efforts, prioritise the right opportunities and drive better results.





Ideal Client Profiles (ICPs)

Know exactly who you serve best. Focus your time, energy and resources where they deliver the greatest impact.



What is an ICP?

An Ideal Client Profile is a detailed description of the type of organisation that gets the most value from your products and services – and delivers the best results for your business.

It defines the companies you are best positioned to help and most profitable to work with.

Build 3 – 5 ICPs to cover your strategic focus



Established Sectors

Where you already have traction.



High Growth Opportunities

Where there is strong future potential.



Explore & Expand

New areas to test, learn and grow into.



Strategic Priorities

Sectors or markets aligned to your goals.



Wildcard Potential

Bold bets that could open new doors.

Why ICPs matter



Focus your efforts

Target the right accounts with clarity and confidence.



Improve success rates

Engage with prospects who have the greatest need and fit.



Increase efficiency

Align sales, marketing and events on the right opportunities.



Drive growth and profitability

Build stronger relationships that deliver long-term value.



The right profile. The right message. The right results.

ICPs are the foundation for smarter targeting, stronger engagement and sustainable, profitable growth.

Certified



Corporation

PROSPECT ENGAGEMENT

Engaging with prospects is about starting conversations, building relationships, and creating value. Use a mix of channels and touchpoints to connect in the right way, at the right time, on both a B2B and H2H (human-to-human) basis.

KEY PRINCIPLES

- ✓ Know your ideal client and their challenges
- ✓ Personalise your approach
- ✓ Add value at every touchpoint
- ✓ Be consistent and follow up
- ✓ Build trust and long-term relationships





Maintaining a Human-to-Human Approach for Sustainable Sales Scale

AI and automation help you scale smarter. But it's human connection that builds trust, creates loyalty and drives long-term success.

Technology opens doors.
People build lasting relationships.



1. Lead with Empathy

Take time to truly understand your prospects' challenges, goals and context.



2. Personalise with Purpose

Use data and AI to inform your outreach, but always personalise to make it relevant and human.



3. Start Conversations, Not Pitches

Focus on adding value early. Ask questions, listen more and talk less.



4. Be Authentic and Transparent

Be honest about how you can help – and where you may not be the right fit.



5. Build Long-Term Relationships

Stay in touch, share useful insights and support your network beyond the sale.



6. Blend Technology with Humanity

Let automation handle the repetitive, so you can focus on building real connections that convert and last.

'People will forget what you said,
People will forget what you did,
BUT they will **NEVER** forget
How you made them feel'

Maya Angelou

What is the Psychology of Sales?

We at Just Williams believe that we should use our business as a force for good.

We champion sales done the right way – it's not about **pushing products**.

It's about **understanding people**.

It's the ability to align what you offer with what your customer already wants, needs or values, recognising that buying decisions are driven by both **emotion and logic**.

Customers don't all buy the same way, some are impulsive, others analytical, but every decision is **human first**.

The most effective sales professionals don't convince. They **connect, understand behaviour, and position value accordingly**.



The Role of Emotional Intelligence in Sales: How to Develop EQ for Better Customer Connections



1. Self-Awareness

- Understand your communication style
- Recognise strengths and blind spots



2. Self-Regulation

- Stay calm under pressure
- Manage emotions during difficult conversations



3. Empathy

- Listen to understand, not respond
- Understand motivations, challenges and concerns



4. Social Skills

- Build rapport and trust
- Adapt communication to different audiences



Listen

Truly hear your customer



Understand

Uncover needs, motivations and challenges



Add Value

Offer insights and tailored solutions



Build Trust

Earn credibility through empathy and consistency



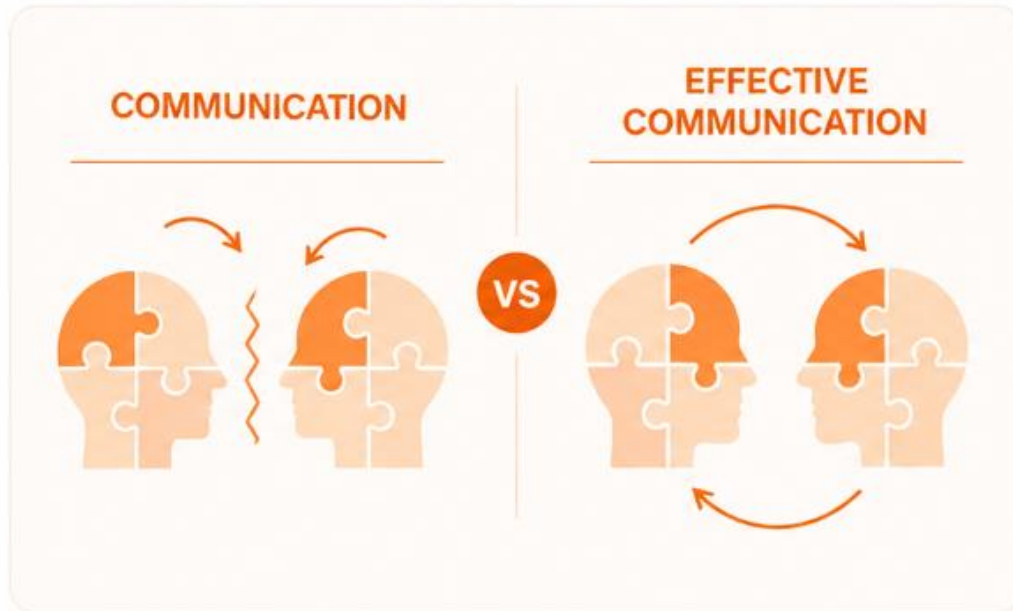
Create Opportunity

Drive better outcomes and long-term relationships



The Art of Effective Communication

Great communication is more than what you say – **it's how it is received.**



What it involves

Effective communication involves effectively conveying ideas and emotions through verbal and non-verbal means, fostering understanding and creating connection.



The key

The key is how the party you are communicating with perceives, comprehends and engages with your message.



It's not just about talking. It's about connecting.

When your message is understood and valued, meaningful conversations drive real results.

Just Williams Top Tips for Effective Communication

Strong communication builds trust, uncovers needs and drives **successful outcomes**.

THE POWER OF A EFFECTIVE CONVERSATION



1. Listen to Understand

Give full attention, listen actively and seek to truly understand before responding.



2. Be Clear and Concise

Communicate your message simply and directly. Avoid jargon and overcomplication.



3. Tailor to Your Audience

Adapt your message to your audience's needs, priorities, communication style and level of understanding.



4. Check for Understanding

Confirm understanding by summarising key points and asking for feedback.



5. Follow Up and Follow Through

Keep the conversation moving forward. Be consistent, reliable and do what you say you will.



Driving Sustainable and Profitable Growth

Winning new business is expensive and time-consuming.

Retaining and growing existing clients is where real value sits. Strong account management builds trust, deepens relationships and uncovers new opportunities, increasing spend over time. **CLV** shifts focus from single transactions to long-term value, encouraging smarter decisions around service, pricing and investment. Retention strategies and focus protects revenue, stabilises cash flow, strengthens reputation and relationships.

Put simply: if you're constantly chasing new clients but losing existing ones, you're standing still. High-performing businesses grow by maximising the value of the customers they already have.



Prioritising and aligning expectations of prospects and ourselves

To communicate openly with prospects about the opportunity and expected timeframes, communication levels and outcomes, we need to set, align and manage expectations from the start.



VS



EXPECTATION

What we hope it will be.

REALITY

What it can be if we don't align.



1. SET CLEAR EXPECTATIONS EARLY

Agree scope, timelines, outcomes and what success looks like.



2. FOCUS ON COMMERCIAL VALUE

Lead with the business impact, not just the technical detail.



3. COMMUNICATE CONSISTENTLY

Provide regular, proactive updates and flag changes early.



4. UNDERSTAND KEY STAKEHOLDERS

Map influence, priorities and what matters to each stakeholder.



5. ALIGN INTERNALLY

Sales and delivery working as one team, one plan.



Clarity / Value / Consistency = Customer Experience

When we align expectations and communicate openly, we build trust, reduce risk and create the best conditions for success.



Clarity



Value



Consistency



Customer Experience



Referrals



Where did your last 10 projects stem from?



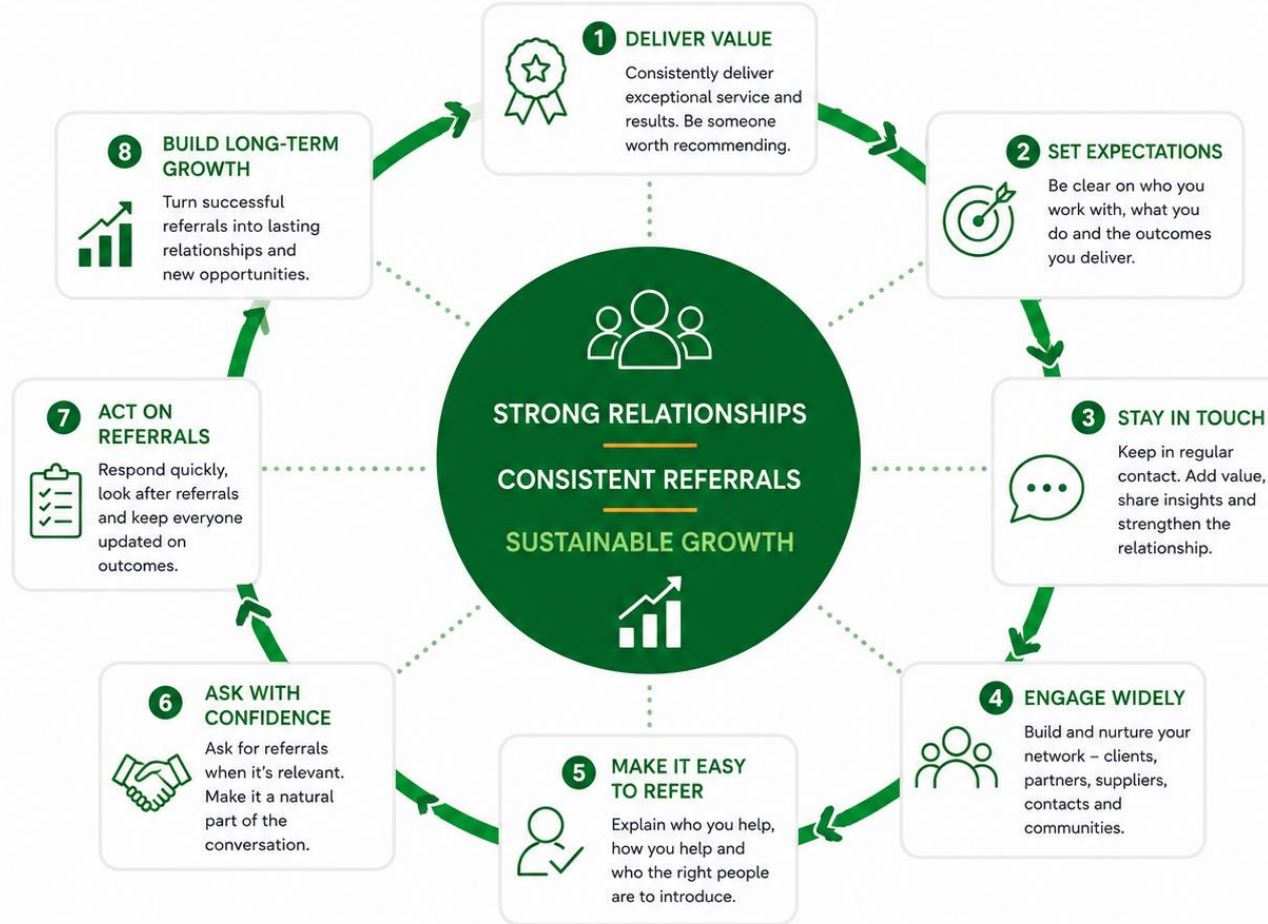
How did your best customers find you?



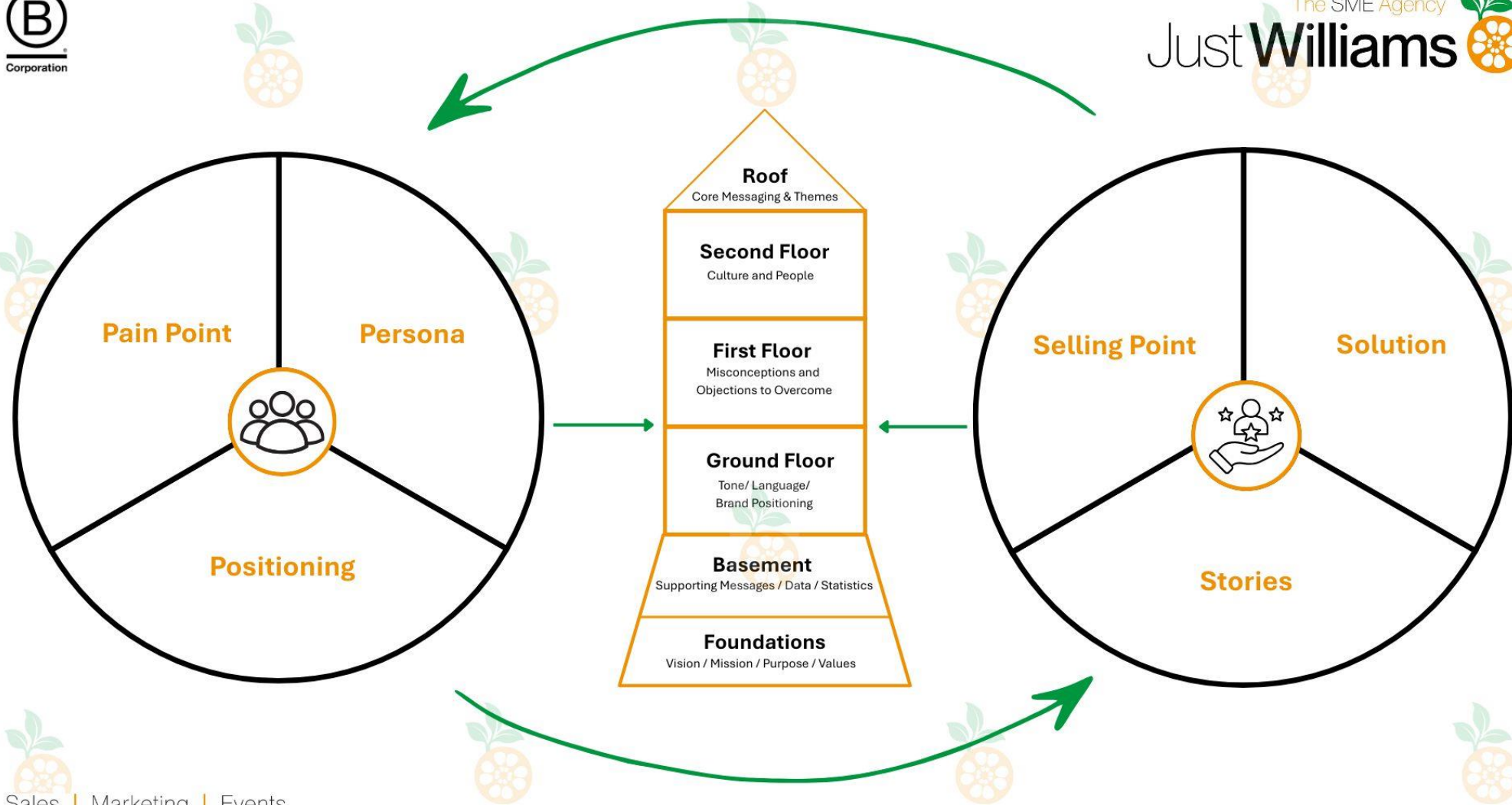
What is your conversion rate for inbound versus outbound?

THE REFERRAL MODEL

A simple, repeatable system to turn relationships into growth









1. ALIGN

Agree on goals, target audiences, key messages, success metrics and ICPS.

2. KNOW YOUR AUDIENCE

Share insights to build a deep understanding of ideal clients and their challenges.

3. PLAN TOGETHER

Co-create integrated campaigns and content that attract, engage and convert.

4. GENERATE DEMAND

Marketing drives awareness and interest through the right channels and content.

5. QUALIFY & NURTURE

Marketing nurtures leads with relevant content and insights until they are sales-ready.

6. HANDOVER

Seamless handover of qualified leads with context and next best actions.

7. CONVERT

Sales engages, builds relationships and moves prospects through

8. DELIVER & DELIGHT

Deliver on promises and create outstanding client experiences together.

9. ADVOCATE & AMPLIFY

Happy clients become advocates. Capture testimonials, referrals and case studies.

10. IMPROVE & GROW CLV

Analyse results, learn together and refine our approach for continuous growth and increased client value.





Just Williams Sales Toolkit

Everything you need to build a smarter, more connected and more effective growth engine.

HOW TO USE THIS TOOLKIT

-  **1 Explore each area**
Understand what's included and why it matters.
-  **2 Assess your approach**
Use the guiding questions to review your current activity.
-  **3 Identify opportunities**
Spot gaps, quick wins and high-impact priorities.
-  **4 Take action**
Build it into your plan and drive consistent execution.



STRATEGY. ALIGNMENT. EXECUTION. GROWTH.
This toolkit brings all the critical building blocks together to drive sustainable, profitable growth.



Stronger pipeline.
Better relationships.



More opportunities.
Better results.

The SME Agency
Just Williams 



Sales | Marketing | Events

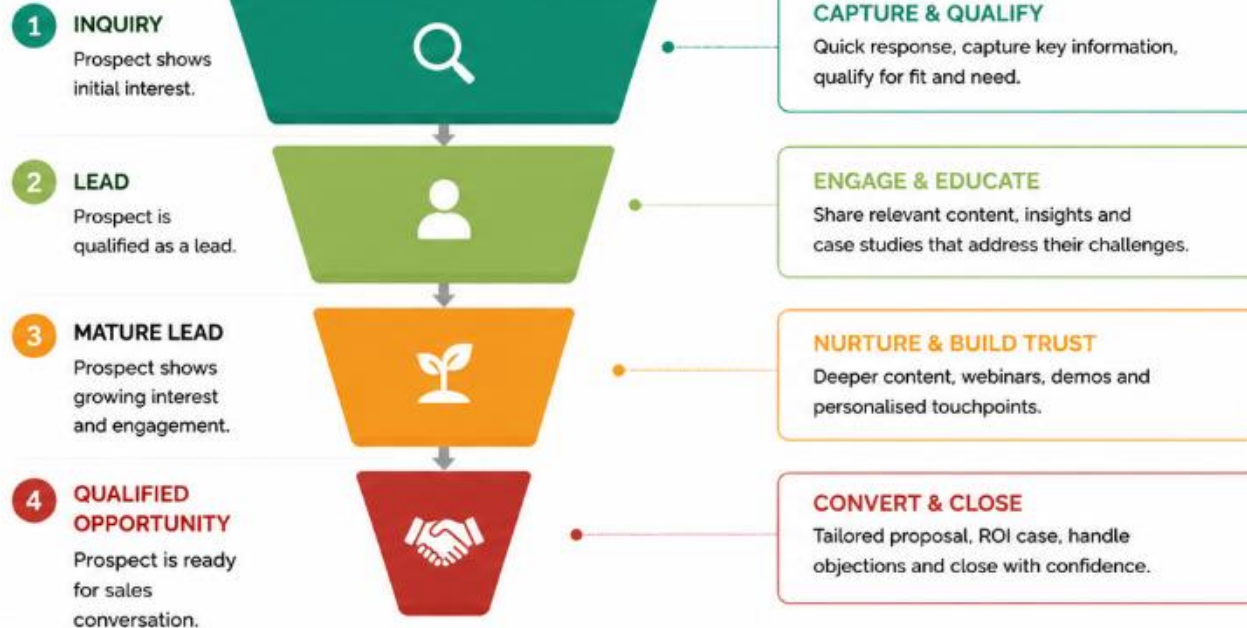
How to Prioritise Prospect Engagement

Right message. Right time. Right channel. Move prospects through the funnel with purpose.


PRIORITISATION PRINCIPLES

-  **FOCUS ON FIT**
Engage prospects that match your Ideal Client Profiles.
-  **FOLLOW INTENT**
Prioritise based on engagement signals and buying intent.
-  **ENGAGE AT THE RIGHT TIME**
Use timely, relevant touchpoints to move prospects forward.
-  **ADD VALUE FIRST**
Provide insights and solutions that solve their problems.
-  **STAY CONSISTENT**
Nurture continuously across channels to build trust.


THE LEAD GENERATION FUNNEL





BEST PRACTICES

 Keep your data clean and up to date.

 Monitor intent signals and engagement.

 Segment and personalise your outreach.

 Measure activity, track progress and optimise.

 Align sales and marketing every step.

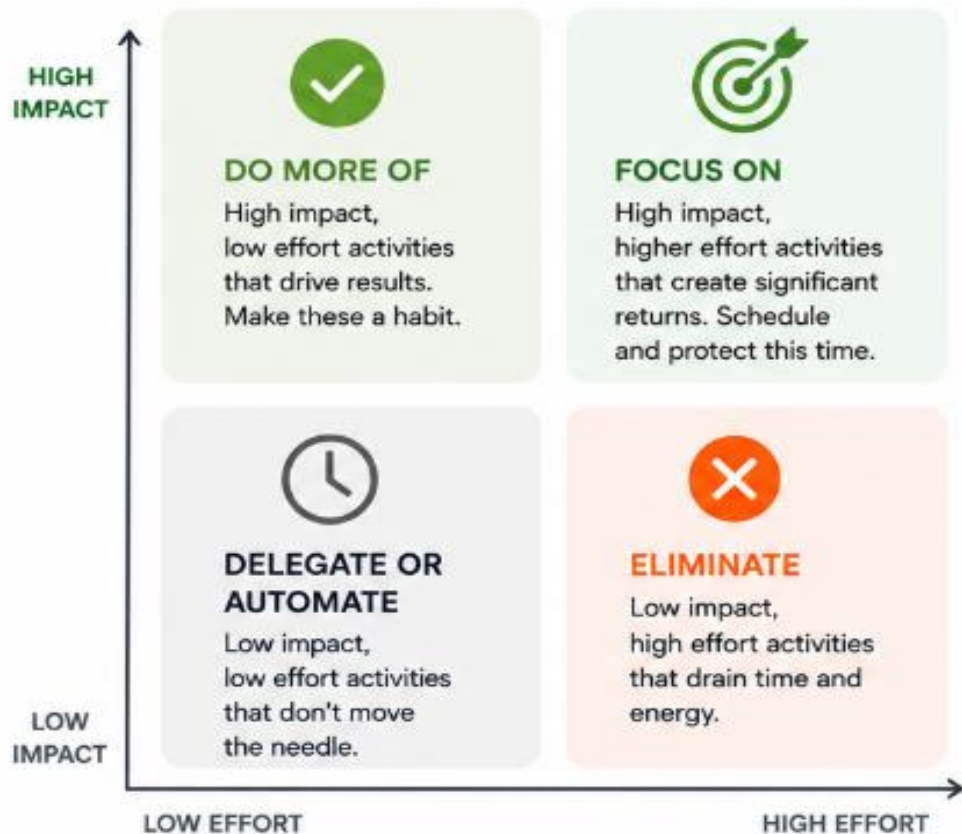


How we prioritise our time determines our results.

Prioritise the activities that will generate a return, create impact and grow your profile.



A SIMPLE PRIORITISATION FRAMEWORK



PRIORITISE TIME FOR SALES ACTIVITIES THAT:



1. GENERATE A RETURN

Focus on activities that lead to conversations, opportunities and revenue. Prioritise outreach, discovery and progressing key opportunities.



2. CREATE IMPACT

Spend time where you add the most value – solving problems, providing insights and influencing decisions.



3. GROW YOUR PROFILE

Invest time in activities that raise your visibility and credibility – LinkedIn, thought leadership, referrals and strategic relationships.



4. PLAN AND PROTECT

Plan your week around high-impact activities. Block time for what matters most and protect it.



5. REVIEW AND REFINE

Regularly review how you spend your time. Double down on what works and stop what doesn't.

Sales | Marketing | Events



Sustainable & Scalable Sales Framework

A repeatable process. Meaningful relationships. Consistent results.



PROSPECT → ENGAGE → QUALIFY → SOLUTION → CLOSE → GROW

KEY ENABLERS FOR SUSTAINABLE & SCALABLE SALES



Clear Strategy
Defined ICP, value proposition and go-to-market approach



Strong Process
Repeatable sales process with clear stages and activities



Consistent Pipeline
Disciplined prospecting and opportunity management



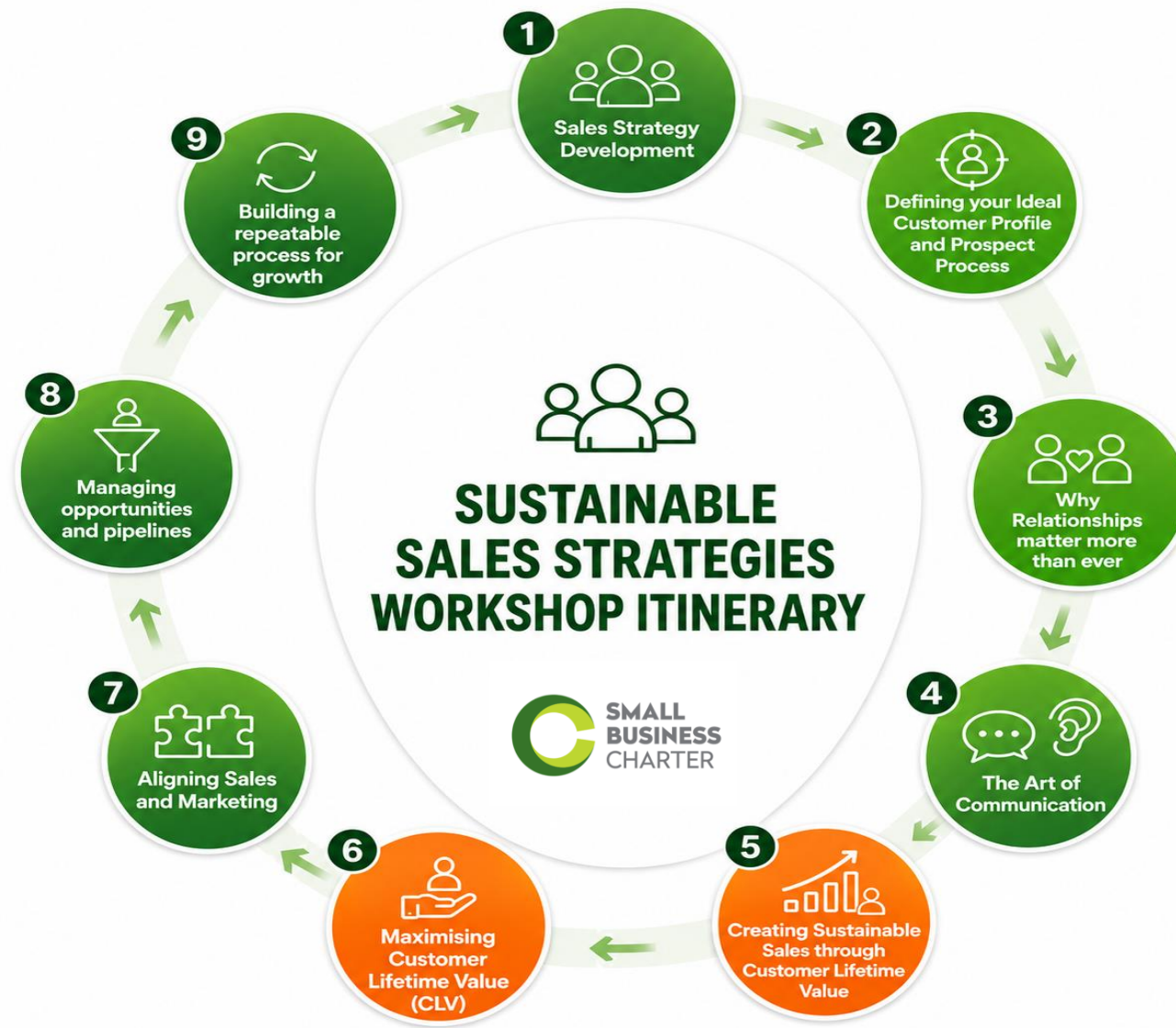
Sales Capability
Skilled team, ongoing coaching and continuous development



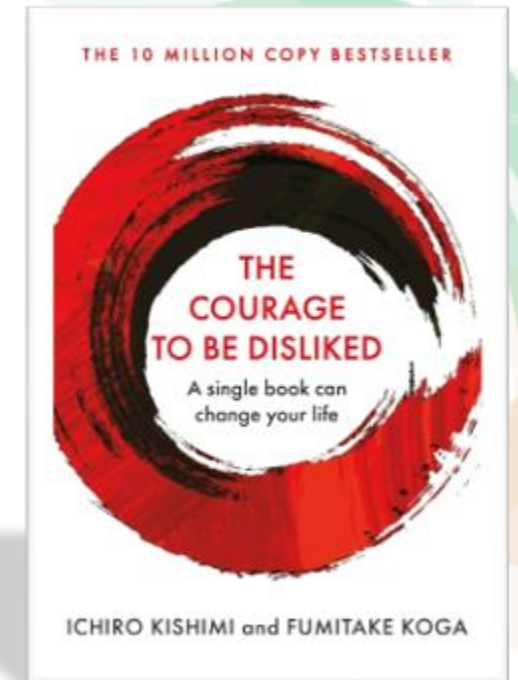
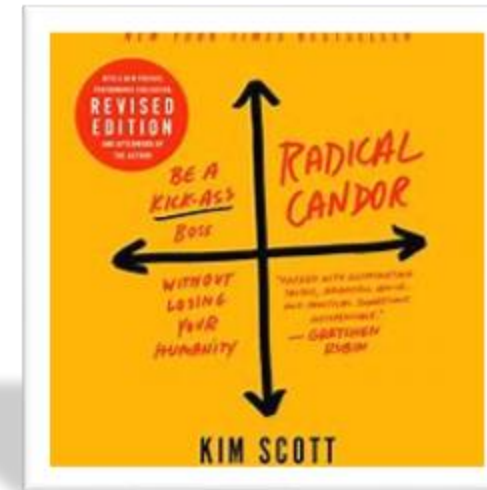
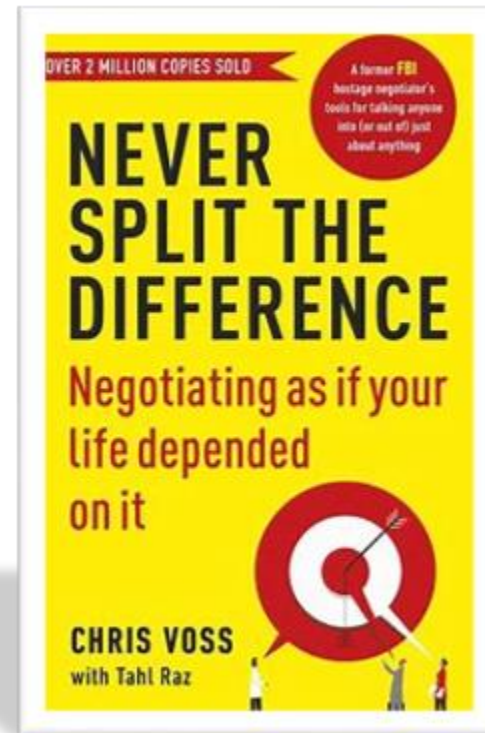
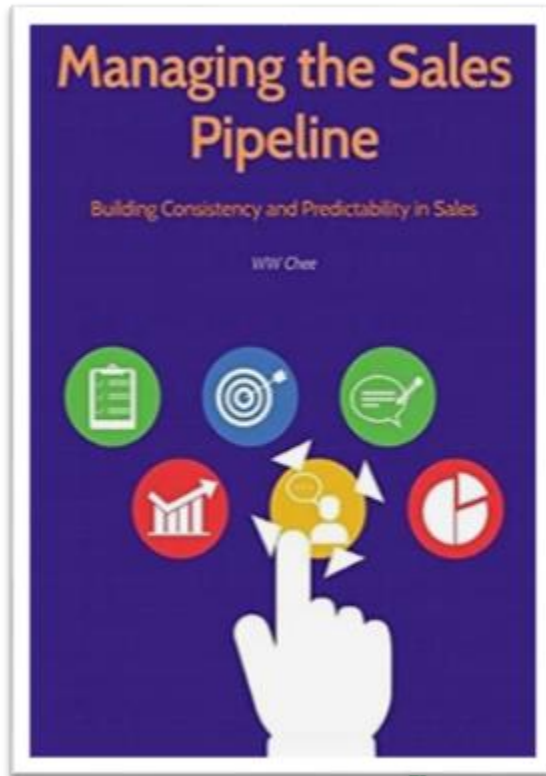
Data & Technology
CRM, tools and insights to drive productivity and decisions

'People will forget what you said,
People will forget what you did,
BUT they will **NEVER** forget
How you made them feel'

Maya Angelou



Recommended Reading





Jessica Williams
Managing Director



Thank You



Sales | Marketing | Events