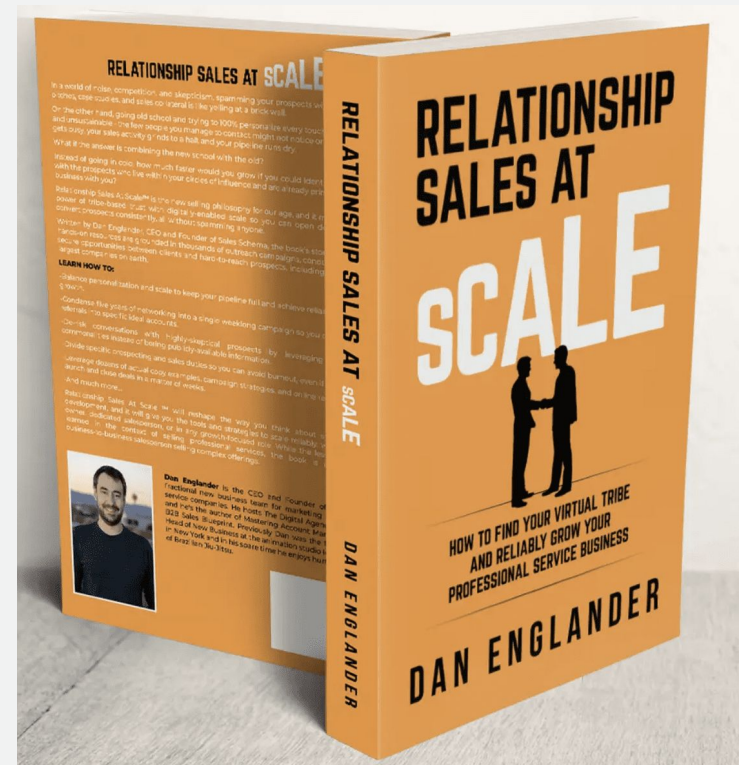


Implement a Business Development System
that Stands Up to Uncertainty.



..

About Dan & Sales Schema



SALES
SCHEMA

Outcomes

- Understand timeless strategy that leverages systematic referrals and trust-focused outreach, without spam or burnout.
- Know how to fit prospecting into your life, even if you're busy.
- Get the exact tools and templates to get started.
- Copy feedback and editing.
- Leave with action plan to generate pipeline in next 30 days.

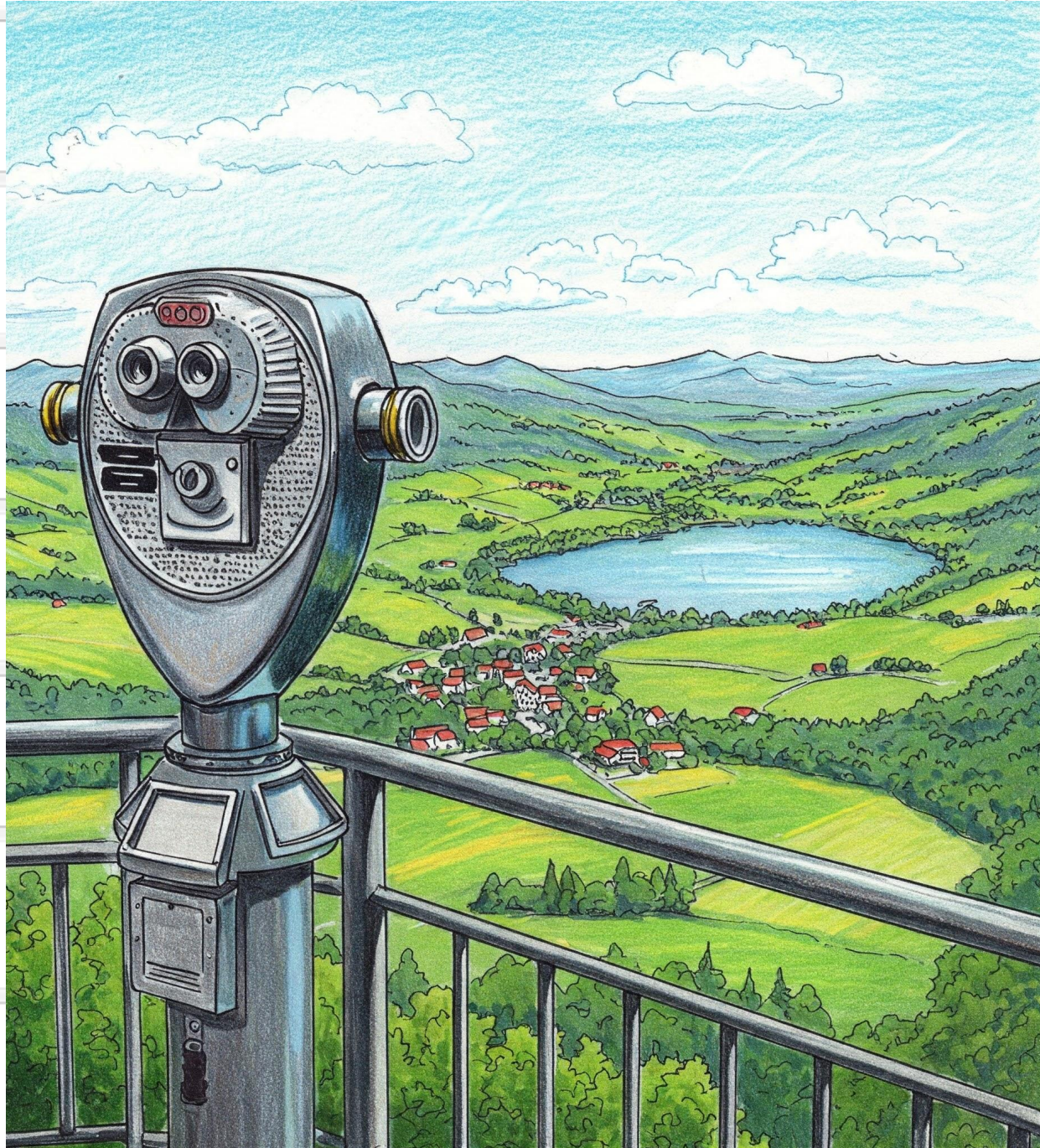
Agenda

1. Why this matters - agency aspirations, trends, and the Trust Recession
2. Reframe 1: Measurement
3. Reframe 2: People
4. Reframe 3: Activity
5. The Trust Matrix - prospect where you have unfair advantage
6. The Direct/Indirect Control Framework
7. The Antifragile Sales Week
8. The Referral Engine
9. Copy Workshop / Q&A / The Six Trust-Building Ingredients

Get the Workbook...



Aspirations



Trends and global events



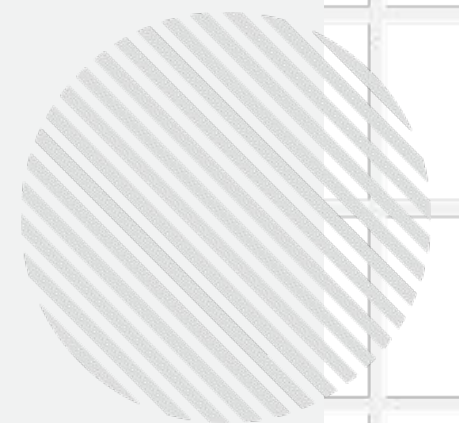
The Trust Recession



..

Interrogating assumptions.

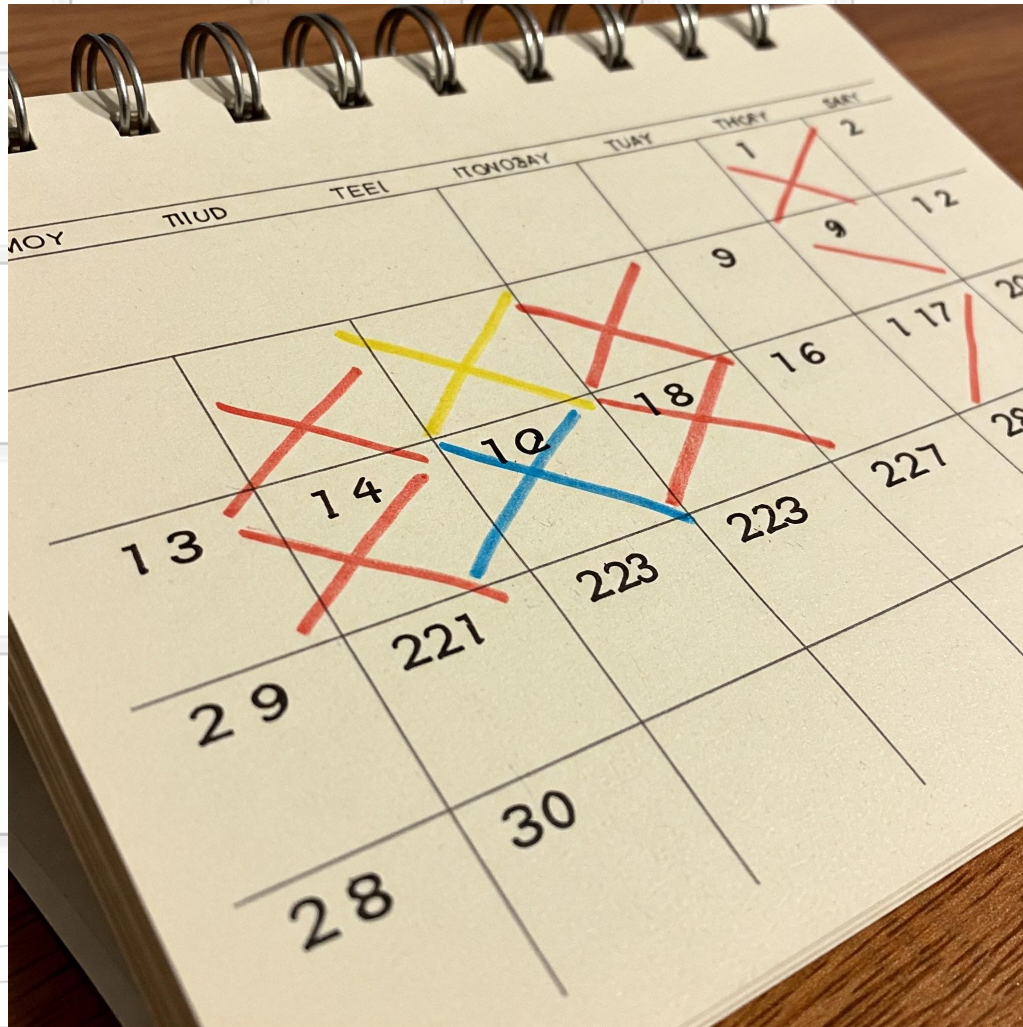
1. To what extent are these trends actually affecting my results?
2. What lives within my control?



Reframe #1: Measurement

Sales KPIs as data collection...

→ Sales KPIs as behavior change



“We need more at-bats...”

Reality: you need a better system and habits.



Tool: The Simple KPI Tracker



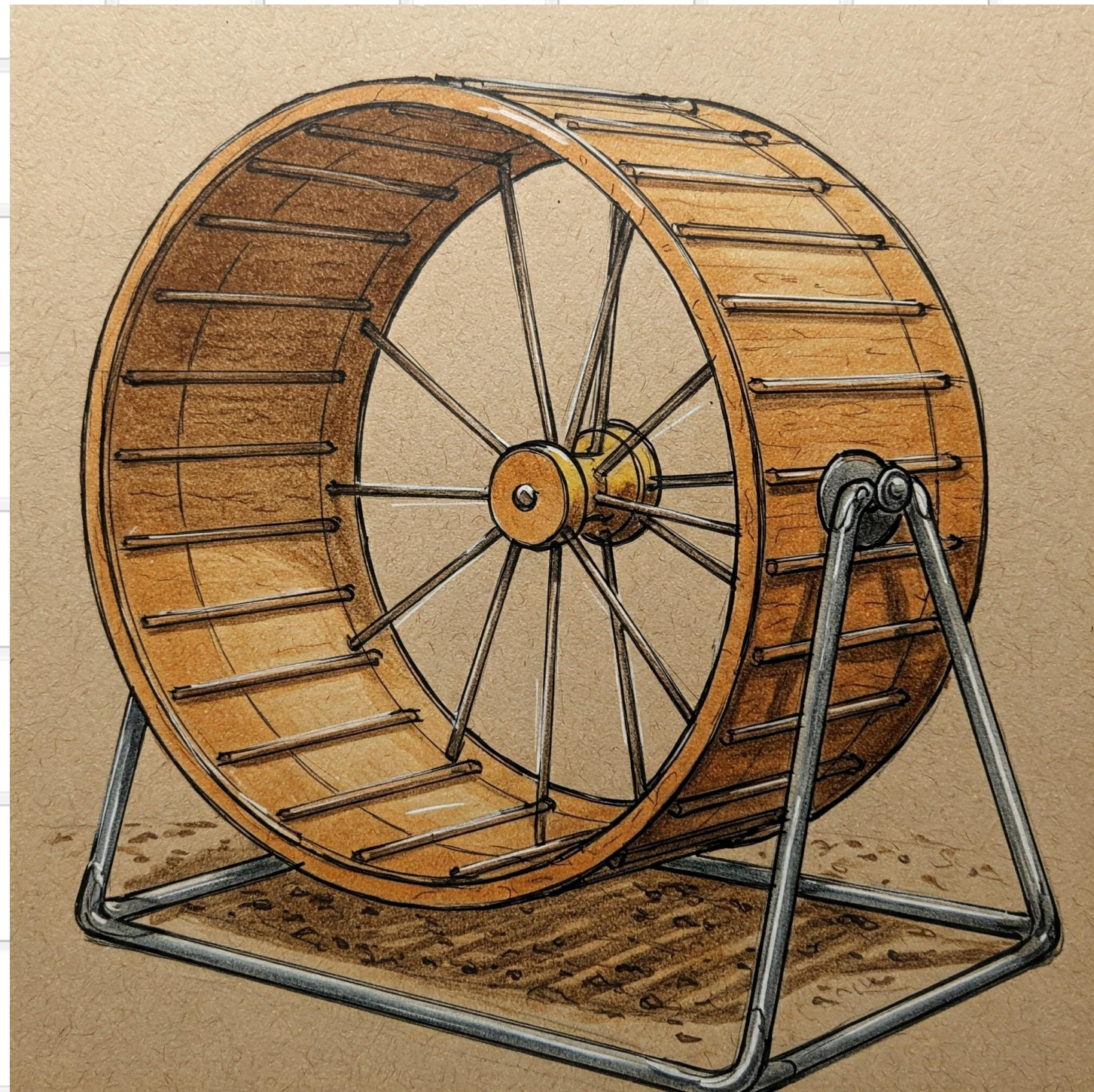
Reframe #2: People

Sporadic prospecting...

→ Dedicated prospecting



The Curse of the Close...



The RACI Framework

Responsible	Lisa
Accountable	Lisa, Tom
Consulted	Frank
Informed	Jane

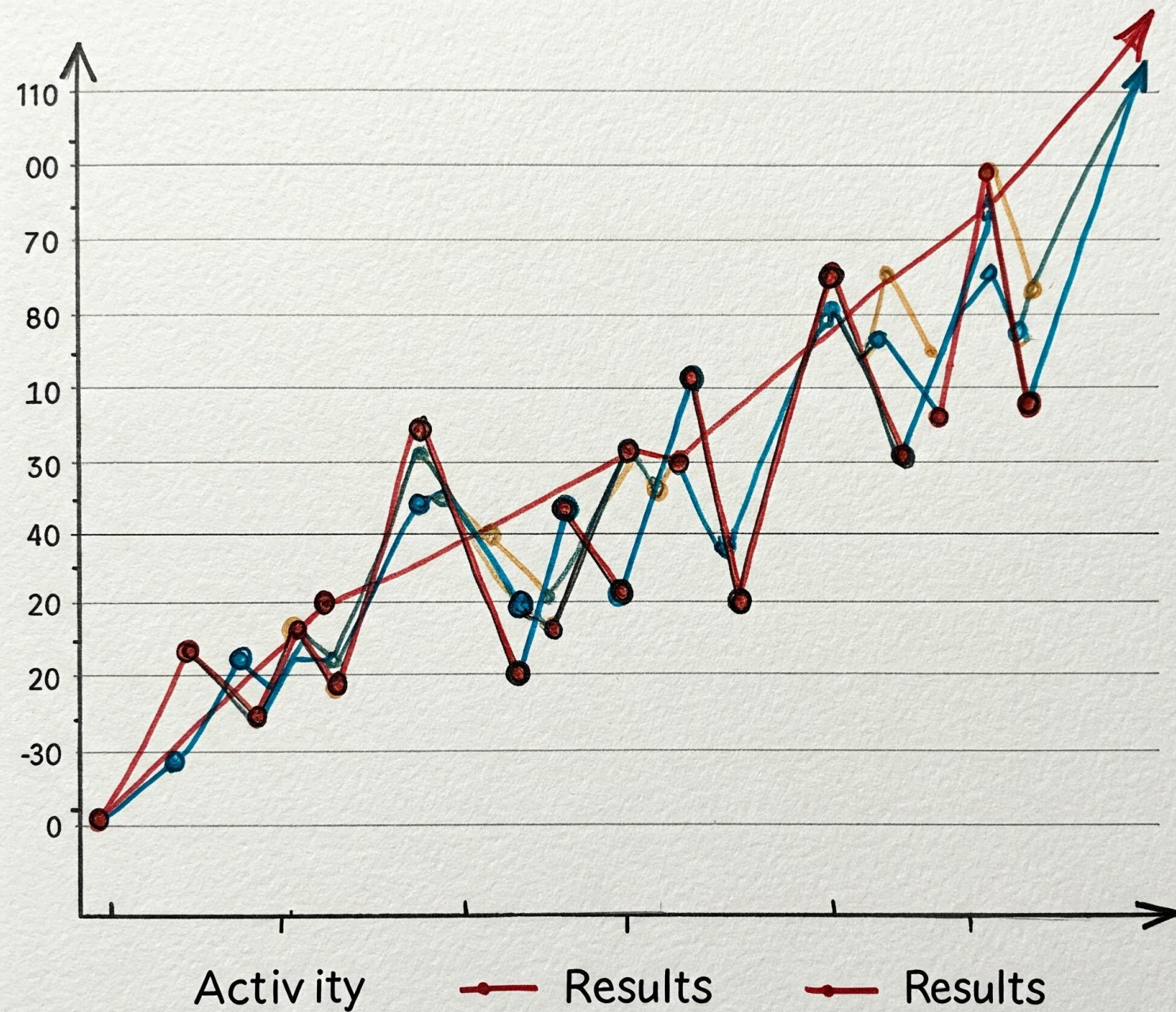
Reframe #3: Activity

Reactive...

→ Proactive



The 90 Day Rule



* credit: Jeb Blount, *Fanatical Prospecting*

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Momentum killer:

Ideal client clarity



Principles of ICP* Selection

- How prospects self-identify > how you think of them
- Use constraints - max 3 ICPs
- Iterate with outreach - decide and commit.

*ICP = Ideal Client Profile

Tool: The ICP Blueprint



Cold prospects

Prospects w/
commonalities

High
volume

2nd degree
prospects

Past
leads

Low
trust

High
Trust

Partners
& friends

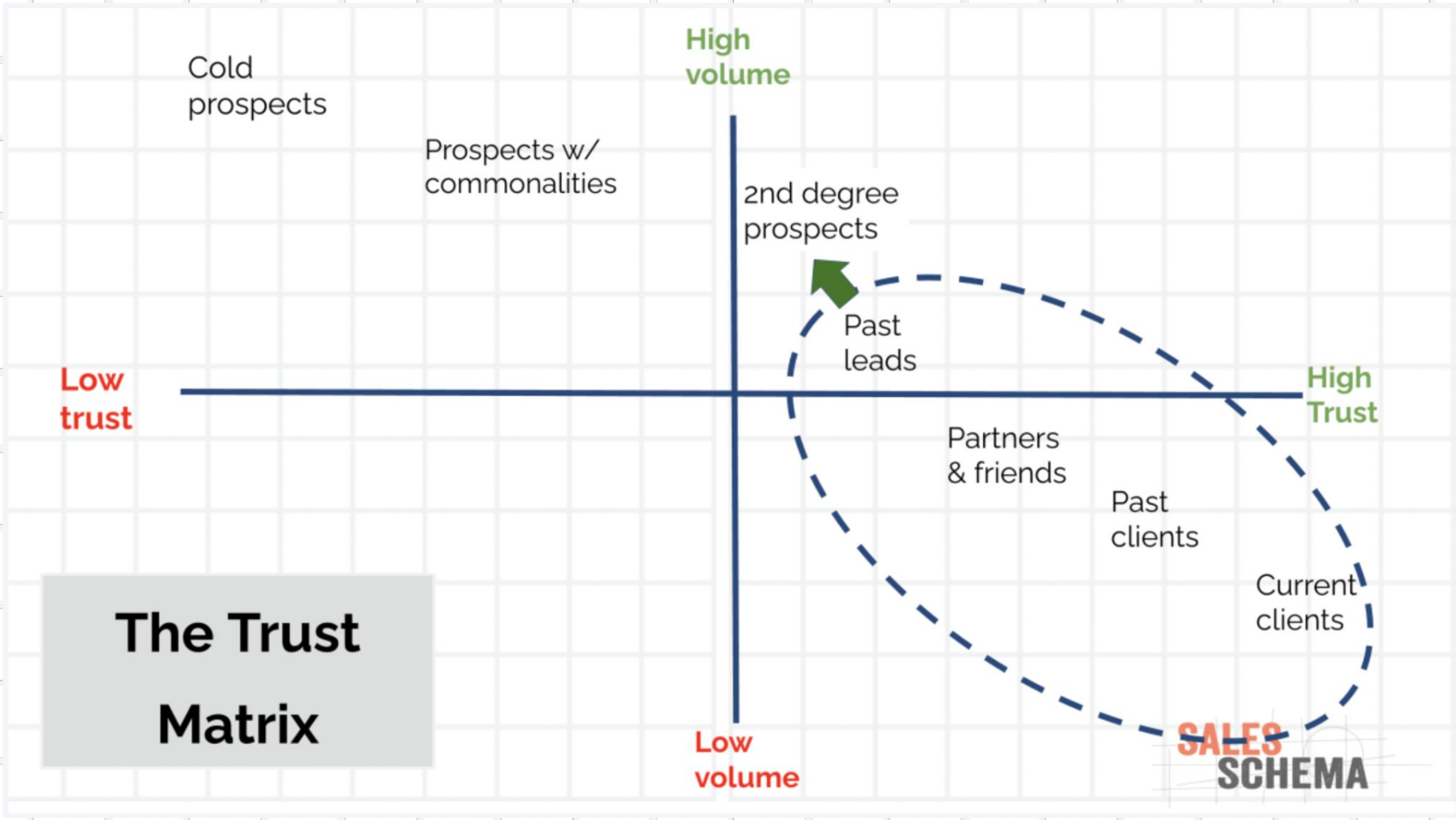
Past
clients

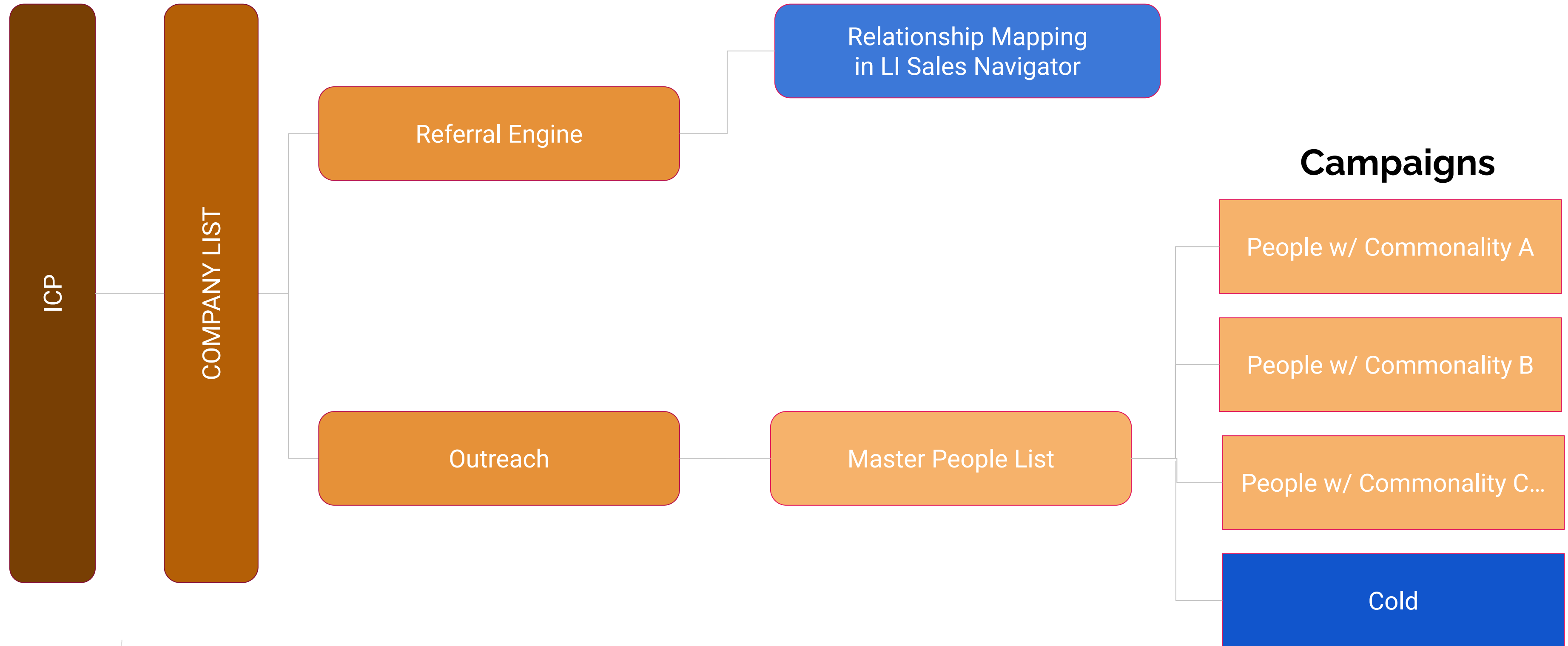
Current
clients

The Trust Matrix

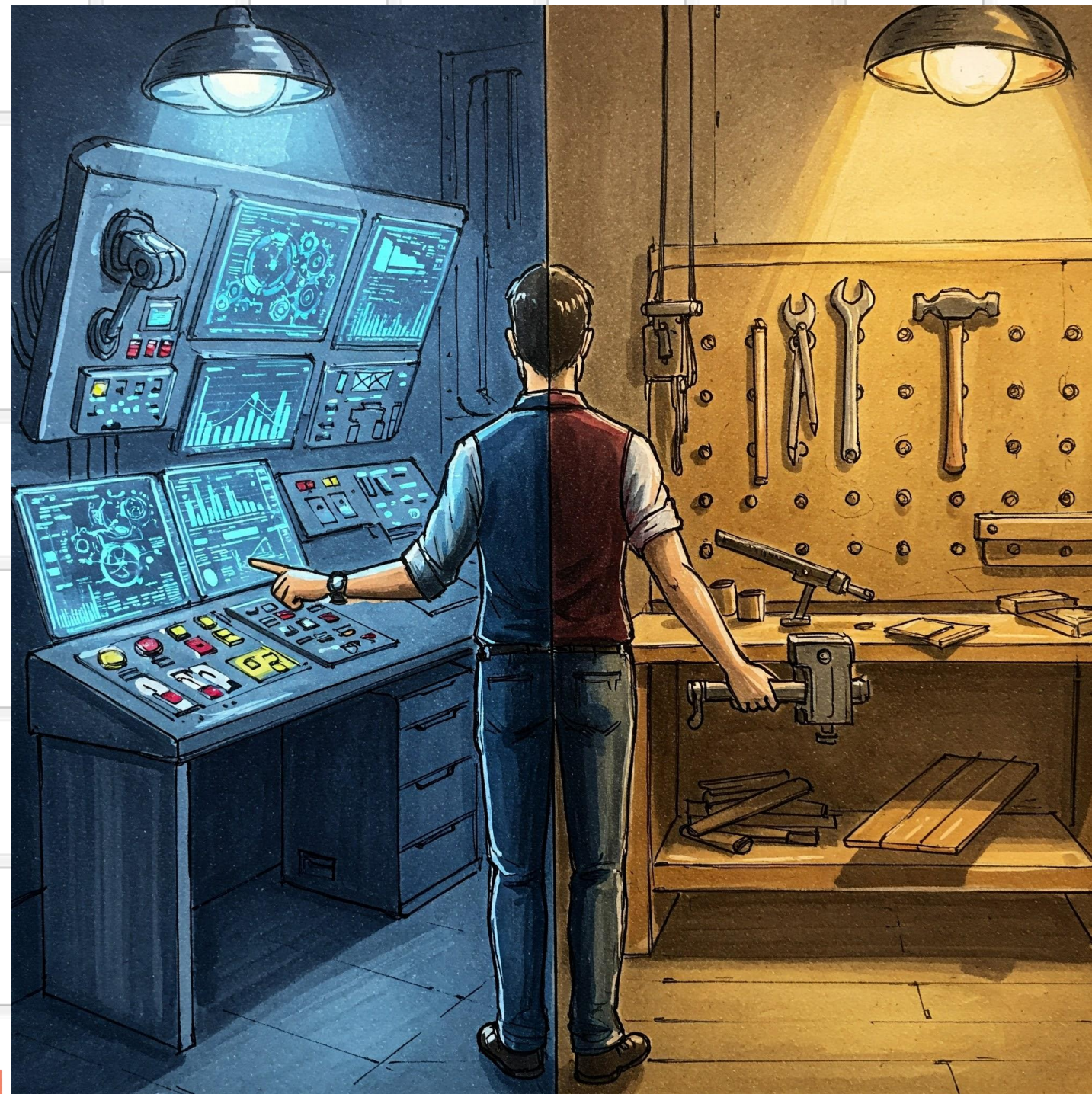
Low
volume

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The Direct/Indirect Control Framework



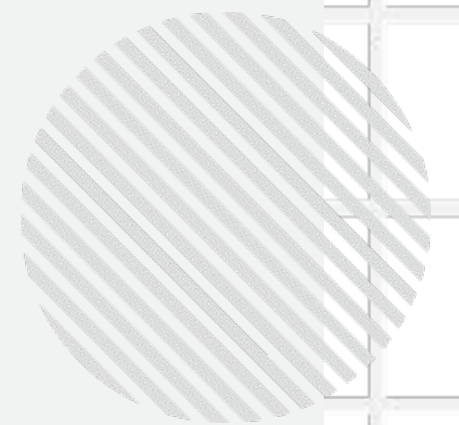
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Indirect control

- Content
- Advertising
- Sponsorships
- SEO
- Outbound (one-to-many)
- Maximum 2 projects concurrently

Direct control

- Cold calling
- LinkedIn social selling
- RFPs
- Proactive referrals...

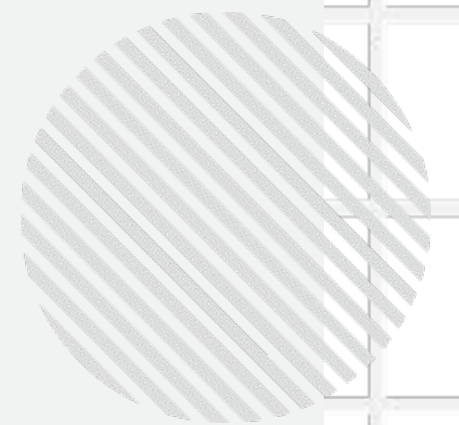


Tool: The Antifragile Sales Week -
for strategic time blocking.



Time blocking

- Divide biz-dev activity by direct vs. indirect control
- Optimize for energy, not just time
- Set targets



The Referral Engine



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The usual referral process

- Reactive
- Unpredictable
- Some try to automate...
- Fit issues and negative pressure



Steps

1. Identify those you know and feel comfortable asking.
2. Identify which connectors likely to know prospects.
3. Get intros tastefully and efficiently.



Tools

- Company lists
- LinkedIn Sales Navigator
- Google sheet (or similar)
- Intro copy templates

Sales Schema set up our outbound function and ran it to drive repeated meetings at the CMO and CEO level. They are organized, detailed, thoughtful and fun to work with - and their approach works.

Morgan McLintic, Firebrand



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1. Relationship mapping

Lead

Account

< Collapse

Director, Vice President, CXO, O... (4 filters)

Save search to get notified of new results

Company type

Company headquarters location

Role

Function

Current job title

Seniority level

Past job title

Years in current company

Years in current position

Personal

Geography

Best path in

Connection

Connections of

TeamLink connections of

Past colleague

Shared experiences

Recent updates

Changed jobs

Posted on LinkedIn

Workflow

Persona

Share search

Pin filters

Advanced Filter Definitions

Clear all

Search keywords

Saved searches

Personas

76 results

Michael Fernandez · 1st

Owner · Factory 360

New York, New York, United States

17 years 9 months in role | 17 years 9 months in company

About: With a steadfast focus on experiential marketing, my tenure as Owner of Factory 360 has been marked by a co...see more

67 mutual connections

Shared groups

2 recent posts on LinkedIn

Tom Stein · 2nd

Chairman and Chief Brand Officer · Stein IAS

New York, New York, United States

39 years 8 months in role | 39 years 8 months in company

About: Senior leader at world's top B2B marketing agency, as well as chairman of MSQ B2B. Served as Jury President f...see more

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Ben Sturner · 1st

President and Owner · Leverage Agency (Sports Sponsorships and Branded Entertainment+Integration)

New York City Metropolitan Area

20 years 1 month in role | 20 years 1 month in company

About: Ben is the Founder and CEO of Leverage Agency a firm that focuses on sponsorship and branded integration wit...see more

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Tina Manikas · 2nd

Global Head of Connected Commerce · Omnicom Commerce

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43 mutual connections

Shared groups

2 recent posts on LinkedIn

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1. Relationship mapping

Connections (Dan) ☆ ☁

File Edit View Insert Format Data Tools Extensions Help

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O53 ▾ | fx

	A	B	C	D	E	F	G	H	M	
1	First Name	Last Name	URL	Email Address	Company	Position	Connected On	LEVEL	Combined	Det
45	David C.	<div></div>	https://www.linke	<div></div>		Practice Lead, A	16 Aug 2023	2	0	
46	Iwan		https://www.linke			Co-Founder Ma	28 Sep 2024	3	0	
47	Aidnes		https://www.linke			Business Develo	25 Sep 2024	3	0	
48	Joe		https://www.linke			Founder/CEO	18 Sep 2024	3	47	
49	Jeremy		https://www.linke			🔥 Founder & Cl	18 Sep 2024	3	1	
50	Gregg		https://www.linke			Founder, CEO	11 Sep 2024	3	0	
51	Peter		https://www.linke			VP of Sales	10 Sep 2024	3	14	
52	Melissa		https://www.linke			Strategic Consul	05 Sep 2024	3	3	
53	Chetan		https://www.linke			GTM Strategist	26 Aug 2024	3	51	
54	Ian		https://www.linke			Owner	22 Aug 2024	3	20	
55	Melissa		https://www.linke			Founder & Grow	21 Aug 2024	3	21	
56	Aaron		https://www.linke			Founder	07 Aug 2024	3	24	
57	Jock		https://www.linke			Digital Marketing	01 Aug 2024	3	0	
58	Ann		https://www.linke			CEO and Owner	22 Jul 2024	3	0	
59	James		https://www.linke			Chief Commercia	19 Jul 2024	3	18	
60	Luke		https://www.linke			Growth Strategy	08 Jul 2024	3	0	
61	Jason		https://www.linke			Director of Sales	01 Jul 2024	3	0	
62	Dominic		https://www.linke			Chief Executive	26 Jun 2024	3	0	
63	Matt		https://www.linke			Independent Mar	21 Jun 2024	3	114	
64	Alex		https://www.linke			VP, Growth & Ac	13 Jun 2024	3	0	
65	Kristen		https://www.linke			Director Client D	13 Jun 2024	3	0	
66	Arthur		https://www.linke			Principal & Chief	11 Jun 2024	3	64	

2. Reconnect request

Reconnecting External



◆ Summarize this email



Dan Englander <dan@salesschema.com>
to Matt, bcc: bump ▾

Fri, Feb 28, 11:19 AM ☆ ↶

Hey Matt,

Happy Friday. I've been enjoying your content - seems like you're getting really consistent with it, which is awesome.

I was hoping to reconnect to see how we can help each other - I saw you might know a few people I'm hoping to connect with, and I'm an open book as well if there's anyone I can put you in touch with. Also, we can talk about the pod interview and get a date on the books, since we're getting close to our next opening.

Free to touch base next week? Feel free to let me know what works, or [my calendar](#) if that's easier.

Cheers,

Dan



3. Connector Conversation - screenshare referrals, low pressure, be helpful

Lead

Account

< Collapse

Director, Vice President, CXO, O...

(4 filters)

Save search to get notified of new results

viewed your profile recently (2)

Best path in

Connection

Connec

Matt Pensinger

Search for your connection

TeamLink connections of

Past colleague (0)

Shared experiences (31)

Recent updates

Changed jobs (1)

Posted on LinkedIn (47)

Workflow

Persona

New

Company type

Company headquarters location

Role

Function

Program and Project Management

Current job title

Seniority level

Director

Vice President

CXO

Owner / Partner

Entry Level (4)

Past job title

Years in current company

Years in current position

Personal

Georanhv

Share search

Pin filters

Advanced Filter Definitions

Clear all

Search keywords

Saved searches

Personas

76 results

Select all

Save to list

Unsave

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43 mutual connections

Shared groups

2 recent posts on LinkedIn

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Best practices

- Be honest
- Be helpful
- Be consistent
- Systems and batching > full automation

4. Referral request follow-up



Dan Englander <dan@salesschema.com>

to Matt ▾

Mar 12, 2025, 5:01 PM



Matt,

Great speaking with you today! I wanted to follow up with a summary of our next steps and the introductions we discussed:

Next Steps:

1. **Podcast Interview:** We're confirmed for Monday, March 24th at 1 PM. We'll focus on the "more business from existing clients" angle.
2. **Referral Structure:** [redacted] ne-tuning this structure,
3. **Introductions:** See details below for the intros.

Introductions from Matt:

1. **Molly** (sports marketing focused agency) - You mentioned she's looking to grow and find scale, which aligns with our services.
2. **Patterson** at [redacted]
3. **Agency** ([redacted]) - You mentioned being friendly with their president and thought this could be a good introduction.
4. Feel free to swap out / in better fits should they come up

For each introduction, feel free to use the template below (customize as you see fit):

Subject: Intro to Dan

Hi **[FIRST]**,


Hope you're well. I wanted to introduce you to Dan Englander (cc'd).

[Dan](#) runs Sales Schema, a training firm that helps agencies implement strategic relationship-based outreach systems. He also hosts [The Digital Agency Growth Podcast](#) and he's the author of [Relationship Sales at Scale](#).

While outreach might not be an immediate need, I think Dan would be a valuable resource, and 'll let you two take it from here!

Best,

5. Intros received!



Matt

to Rick, me

Mon, Mar 24, 3:07 PM

☆ ↶ ⋮

Hi Rick,

Greetings and I hope all is well!

I wanted to introduce you to Dan Englander (cc'd).


[Dan](#) runs Sales Schema, a training firm that helps agencies implement strategic relationship-based outreach systems. He also hosts [The Digital Agency Growth Podcast](#) and he's the author of [Relationship Sales at Scale](#).

Dan and I have gotten to know each other in recent months and I thought he would be an interesting connection for you to meet. Even if you are not currently in need of external support to help you drive outreach for EA, I think Dan would be a valuable resource for you to connect with as you continue to grow and also think about expanding business with enterprise clients.

Thanks and I'll let you and Dan take it from here. And, let's get another coffee on the books soon - I'll send you a separate update about my new job too.

Regards,

Matt



Rick

to Matt, me

Mon, Mar 24, 4:49 PM

☆ ↶ ⋮

Thanks for the intro Matt - nice to meet you Dan!

Hit me up separate Matt and we'll grab coffee so I can hear about the new gig

Talk soon,

Rick

RICK

President

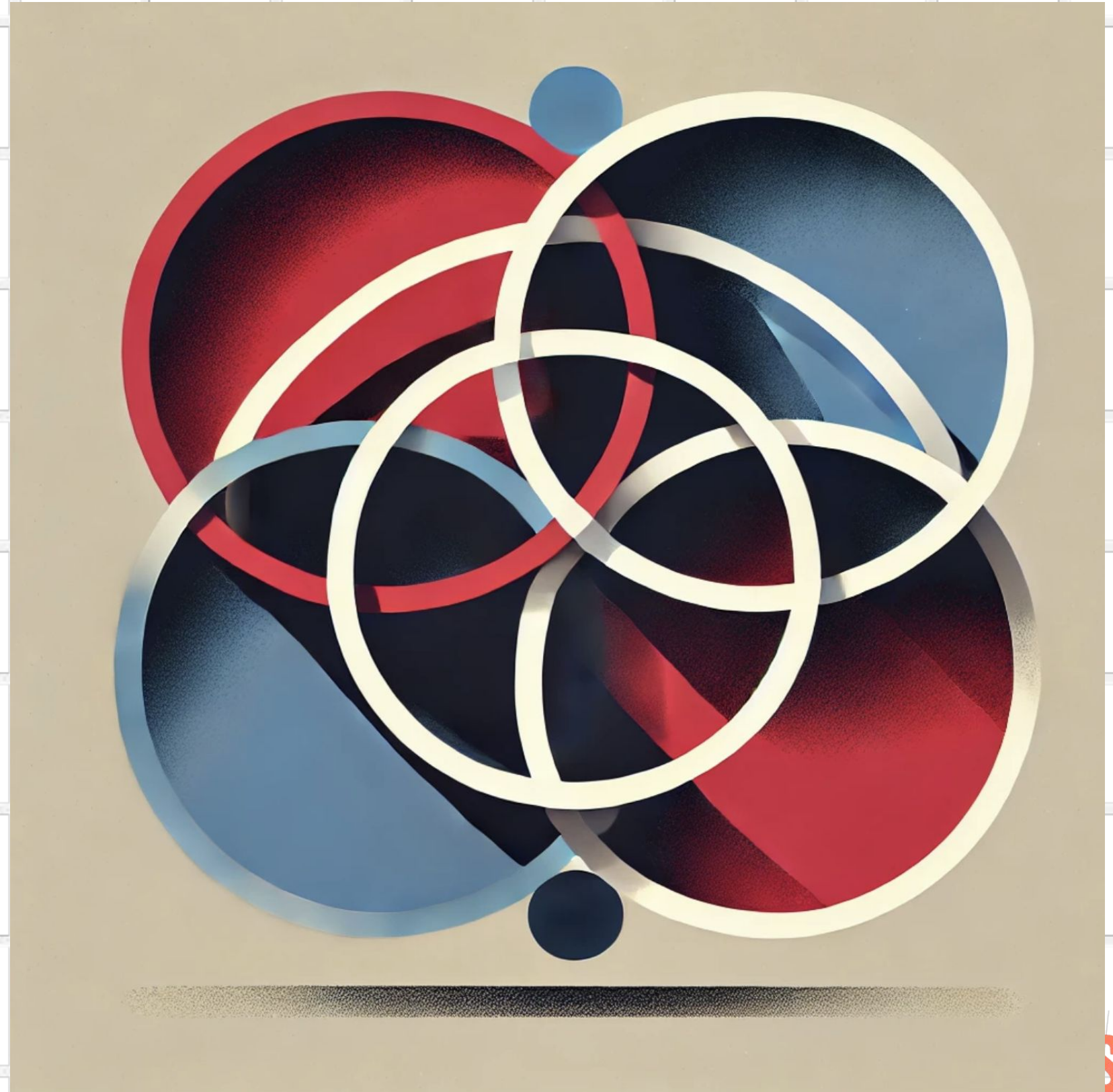
⋮

The Six Trust-Building Ingredients



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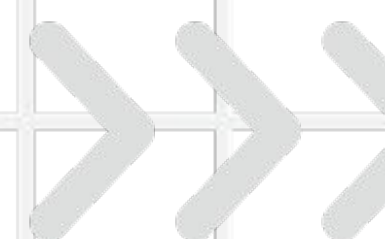
1. Tribe-based kinship



2. Deep understanding



3. Show
don't tell

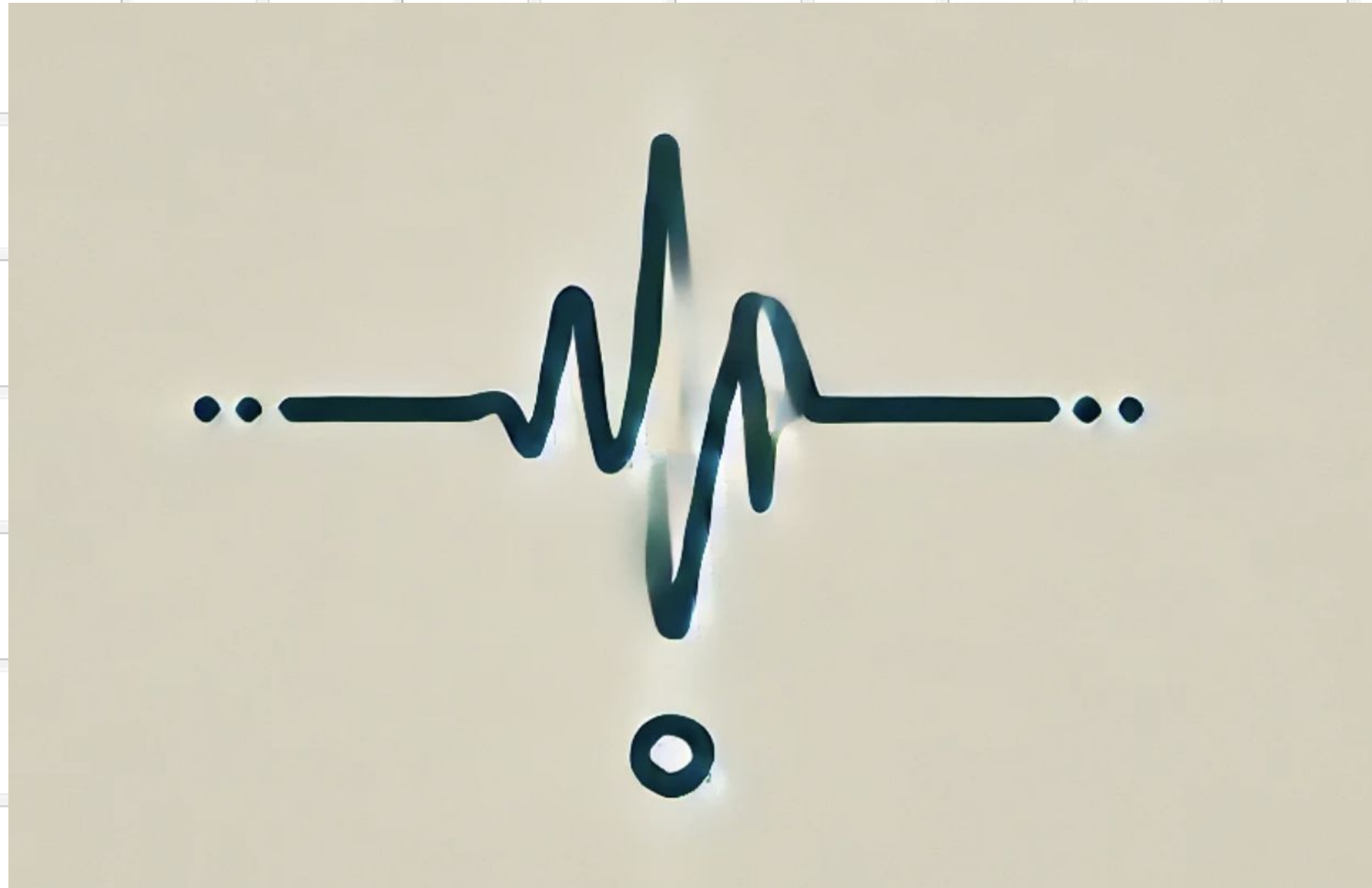


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4. Timeliness



5. Pattern interrupt



6. De-risking

