KNOW WOMEN · VIRTUAL MASTERCLASS

Stop Chasing Clients. Start Winning Contracts.

A Get in the Room™ masterclass on corporate-contract readiness—how to be known, trusted, and chosen before the RFP goes public.

Carrita Tanner-Cloud

Founder, Carrita Cloud & Associates · KNOW Women · 45 minutes + Q&A



THE SHIFT · 3 MIN

Corporate buyers buy confidence—not just capability.

01

Can you solve our problem?

A credible link between what you do and the outcome we need.

02

Can you prove it?

Relevant evidence, references and a delivery record we can check.

03

Can we trust you to deliver?

Capacity, compliance and follow-through when the work gets hard.

THE WORKING FLOW · NOT A ONE-TIME PITCH

01 Target
right accounts

02 Position
buyer language

03 Connect
a warm route in

04 Prove
evidence they trust

05 Follow through
a system, not luck

Visibility gets you noticed. Evidence gets you shortlisted. Reliability gets you renewed.
So the work is not more posting. It is building the proof a buyer can check—and a reason to keep talking.

THE BUYING ROOM · 4 MIN

Know who is in the buying room.

01

Problem sponsor

CARES ABOUT

Feels the pain. Needs a fix and a number to defend.

YOUR MOVE

Ask what change looks like in 90 days.

02

Budget owner

CARES ABOUT

Funds the work. Protects the number and the risk.

YOUR MOVE

Tie price to outcome, not hours.

03

Procurement

CARES ABOUT

Runs the process. Needs compliance and comparison.

YOUR MOVE

Follow every instruction exactly.

04

Supplier diversity

CARES ABOUT

Opens access. Tracks spend with certified suppliers.

YOUR MOVE

Lead with fit. The label is not the pitch.

05

Legal & security

CARES ABOUT

Clears the risk. Can stop the deal late.

YOUR MOVE

Answer early, in writing, and fully.

A champion is not an approver. Early relationships help you understand the need—they never replace the process.
Ask before you write anything: **Who signs? Who can say no? What happens after I say yes?**

POSITIONING · 5 MIN

Make your offer sound like a business outcome.

BEFORE · ABOUT YOU

We provide leadership development workshops and executive coaching for teams.

Reads as: we do this for anyone with a team. The buyer has to do the translation.

AFTER · ABOUT THE BUYER

We help newly promoted managers at mid-market manufacturers ramp faster—through a six-week cohort and measured behavior change.

Reads as: a specific buyer, a specific result, and a reason to believe it.

Illustrative example only. It is not a client result and should not be reused as one.

THE BUYER-LANGUAGE FORMULA

Help **[specific team]** solve **[specific problem]** through **[defined solution]**—proven by **[evidence]**.

YOUR TURN · 60 SECONDS · TYPE IN THE CHAT

Who do you help, what problem do you remove, and what proof can you show?

TARGETING · 5 MIN

Build your Corporate Hit List™

Ten accounts you can actually reach—not a list of logos.

Company	Signal to watch	Path in	Proof fit	Next action
Health system	New facility, Q1	Former client, VP Ops	Onboarding work	Intro by Nov 20
Manufacturer	40 new managers	KNOW peer intro	Cohort program	1-pager by Nov 22
National retailer	Supplier summit, Q1	Diversity team	Packaging redesign	Register this week
Insurance carrier	New CXO hired	Alum network	Ops audit	Note + insight
University system	Campaign launch	Board connection	Brand system	Offer a discovery

Score every account 1–5: fit · signal · access · proof · timing. Then keep ten and work three this week.

Illustrative entries only—not real opportunities. A signal is a verified change: a new leader, a new site, a launch, a mandate.

ACCESS · 4 MIN

Get in the right rooms—without chasing everyone.

01

Warm introductions

Clients, alumni, investors, KNOW peers. Ask for a specific introduction—and send a one-liner they can forward.

02

Industry & supplier events

Trade associations, chambers, conferences. Go to meet three buyers—not to collect business cards.

03

Buyer supplier programs

Register where you fit. Portals and diversity directories create a record—not a relationship.

04

Partner & subcontract routes

Primes, agencies, integrators. Subcontract first, then grow into direct work.

CERTIFICATION, IN CONTEXT

What it does

WBENC certification verifies at least 51% women ownership, control, operation and management for eligible US businesses. Corporate members use it to find you.

What it doesn't do

It does not award a contract, guarantee a meeting, or prove you can fund the work.

Source: WBENC certification FAQ

Pick two routes. Work them for 90 days before adding more.

OUTREACH · 4 MIN

Start a conversation. Earn a next step.

SAMPLE OUTREACH EMAIL · ILLUSTRATIVE

Subject: A thought on your Q1 manager rollout

Hi Dana,

I saw your team is hiring 40 first-time managers across the Indiana plants. We build six-week cohort programs that get new managers productive faster—most recently for a 300-person manufacturer.

Would a 15-minute call in the next two weeks be useful? If the timing is wrong, tell me when to check back.

Carrita

P.S. I'll be at the supplier summit on the 14th—glad to say hello in person.

THE FOUR RULES

— One ask, one next step.
— Under 120 words.
— Reference something true.
— No attachment on the first touch.

FOLLOW-UP THAT ISN'T NAGGING

Day 0 Send the note.

Day 5 Add one useful idea.

Day 12 Final note, then pause 90 days.

Replace every detail with something you verified. A borrowed compliment reads like a template.

Log every touch and the next date. A pipeline you cannot see is a pipeline you cannot manage.

QUALIFY · 4 MIN

Qualify the opportunity before you write the proposal.

A Problem & urgency

What breaks if this doesn't change? When must it be solved—and what happens if it isn't?

B Money & authority

Who owns the budget? Who signs—and who can quietly say no?

C Process & timing

What are the steps, criteria and dates between yes and start?

D Fit & risk

Can we deliver this well, at a price that works, with the data we can access?

WALK AWAY WHEN

— You cannot reach the decision maker.
— The budget is a guess, not a number.
— The scope outruns your capacity to deliver.

Agree the next step **before** the call ends—and put it on the calendar while you are still on the call.

Discovery structure adapted from Salesforce sales guidance. Always follow a formal RFP's specified process.

READINESS · 4 MIN

Be easy to trust—and ready to deliver.

Capability statement — one page: who you help, what you deliver, and the proof that you have done it.

Two relevant case studies — problem, action, measured result. Written permission to share.

Two references — buyers who will take the call and speak to how you work.

Delivery capacity — team, tools, timeline and coverage. Name who does the work.

Compliance pack — W-9, certificate of insurance, certifications, security answers.

Cash readiness — can you fund 60–90 days of delivery before the invoice clears?

> **Onboarding is not authorization.** Microsoft's procurement guidance says a required contract must be executed before work begins; business-specific SOWs or POs follow signature.



PROPOSAL · 4 MIN

Write a proposal the buyer can approve.

Their priority	Your section	What good looks like
Stated problem	Executive summary	Their words, their metric, your promise
Selection criteria	Approach & scope	Mirrors their order, with no gaps
Success measures	Outcomes	Baseline, target, and how you report
Price & risk	Investment	Price, assumptions, exclusions
Approval steps	Next step	Named decision, date, signature path

COMMERCIAL GUARDRAILS

— Scope and exclusions
— Change control
— Acceptance criteria
— Payment trigger and invoice rules
— IP ownership and usage rights
— Liability and termination

If it isn't written down, it isn't agreed. That includes the date and the deliverable.

BEFORE ANY WORK STARTS

Never start on a verbal yes. Confirm the executed agreement, written authorization, and any required purchase order—then invoice against the PO.

Contract terms are commercial decisions. Have qualified legal and accounting counsel review anything material.

30-DAY PLAN · 4 MIN

Turn the masterclass into a 30-day pipeline.

WEEK 01

Choose your targets.

— Pick 10 accounts.
— Rewrite your one-liner.
— Choose your proof.

WEEK 02

Build the evidence.

— Assemble the proof packet.
— Send 10 tailored notes.
— Ask for 3 introductions.

WEEK 03

Qualify hard.

— Hold 5 discovery calls.
— Confirm budget and authority.
— Agree a dated next step.

WEEK 04

Put offers on the table.

— Send 2 scoped proposals.
— Follow up on every thread.
— Book the December review.

TRACK WEEKLY

Conversations started · discoveries held · qualified opportunities · proposals out · dated next steps

In the chat: one target, one action, one date. Say it out loud and someone here will hold you to it.

Q&A · FINAL 5 MINUTES

Get in the room.
Be ready when it opens.

Leave with three things:
one target, one proof, one dated next step.

Carrita Tanner-Cloud
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Bring one question. Leave with one action you will take this week.

Sources: WBENC, Microsoft Procurement, Salesforce.

THE NEXT STEP

Your next room.

Get in the Room™ Corporate Challenge—a 60-day business development system.

Scan to join the Corporate Challenge

getintheroom.theccafirm.com/register

Point your phone camera at the code. Tap the link if you are already on a device.