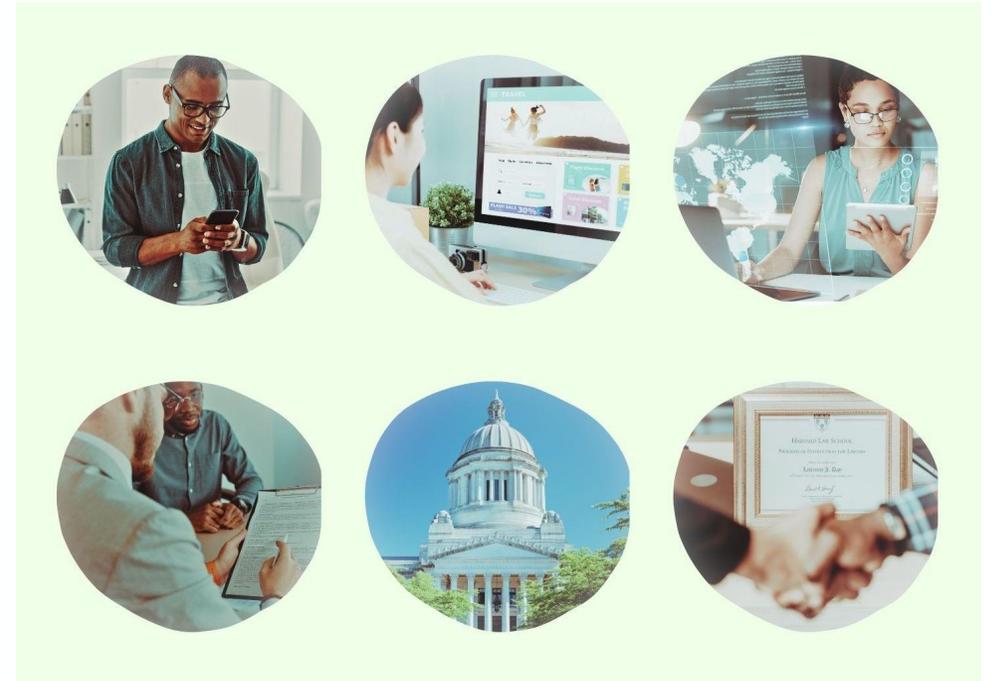


INTRO TO PROSPECTING: MEETINGS AND FOLLOW UP



Presented by

**Ryan Taylor, President
Golden Gift Consulting**

October 15, 2025

Agenda

1. Welcome and Introductions
2. Workshop—State Contracting Basics
 - *OFM Vendor Payee Registration*
 - *Sales Reporting*
 - *Small Business Registration & Certifications*
 - *Scope & Quote Process*
3. Workshop—Intro to Prospecting: Meetings and Follow Up
4. Q & A and Discussion (Workshop Topic)
5. Q & A about Statewide Contracts
6. Closing Remarks



State Contracting Basics:

**OFM Vendor Payee Registration, Sales Reporting,
Small Business Registration & Certifications,
Scope & Quote Process**

OFM Vendor Payee Registration

Register for OFM at: [Vendor payee registration | Office of Financial Management](#)

- Enter business information.
- Enter bank account information.
- Watch email for notification of acceptance, rejection or clarification.



The image shows a form titled "Office of Financial Management Vendor/Payee Registration Form". It is divided into two main sections: "PART A - Contact Details" and "PART B - Vendor/Payee Registration".

PART A - Contact Details

PLEASE DO NOT STAPLE
Vendor/Payee Registration Form

MAILING ADDRESS: _____
City: _____ State: _____ Zip code: _____

Contact Person: _____
Telephone Number: _____
Email Address: _____

PART B - Vendor/Payee Registration
Request for Taxpayer Identification Number and Certification - Substitute Form W-9

1. Legal Name (as shown on your income tax return): _____
2. Business Name, if different from Legal Name above - e.g., Doing Business As (DBA) Name: _____

3. Check ONLY ONE box:

<input type="checkbox"/> SSN or EIN: Individual/sole proprietor (including LLC, sole proprietor)	<input type="checkbox"/> EIN only: Corporation (including S-Corp, LLC, S-Corp and LLC, Corp)	<input type="checkbox"/> All Other Status(es) of Govt. N/A State Agencies
<input type="checkbox"/> SSN only: Used Exempt - Class 1 Volunteer Board/Committee member	<input type="checkbox"/> Partnership (includes LLC) Non-Profit Organization Tax-Exempt Organization	<input type="checkbox"/> Federal Government (including Tribal) Trust/State

4. For Corporation or Partnership ONLY, check one box below if applicable:
 Attributed Attorney/Legal

5. Legal Address (number street and apt or suite no.) This should be the address on file with the IRS: _____
6. City, State, Zip: _____

7. Tax Identification Number (TIN) PLEASE CHECK ONE
 For individuals, this is your social security number (SSN)
 For other entities, this is your employer identification number (EIN)
Enter your EIN or SSN (do NOT enter both): _____

8. Certification

I. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and

II. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and

III. I am a U.S. person, including a U.S. resident alien (defined in the W-9 instructions to be found at [www.irs.gov](#)), and

IV. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification Instructions: You must cross out box 3 above if you have been notified by the IRS that you are correctly subject to backup withholding because you have failed to report all interest and dividends on your tax return. Please note this form does not include a FATCA exemption code field, and therefore that it does not apply. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

SIGNATURE OF U.S. PERSON (no electronic, stamped or inserted signatures) _____ Date: This form is valid for 90 days _____

Rev. 02/2024

Sales Reporting

- Complete Sales Report at the following link: [Login](#).
- Pay management fee for all revenue generated through statewide contract during quarter. *The Management fee amounts can vary. You can locate the exact details about your management in your official contract document.*

Gross receipts = total revenue, not profit.

- Invoice will be posted in account and emailed to you.
 - You must call the DES payment processing department at (360) 725-5700 to pay your invoice. You cannot pay through an online account.

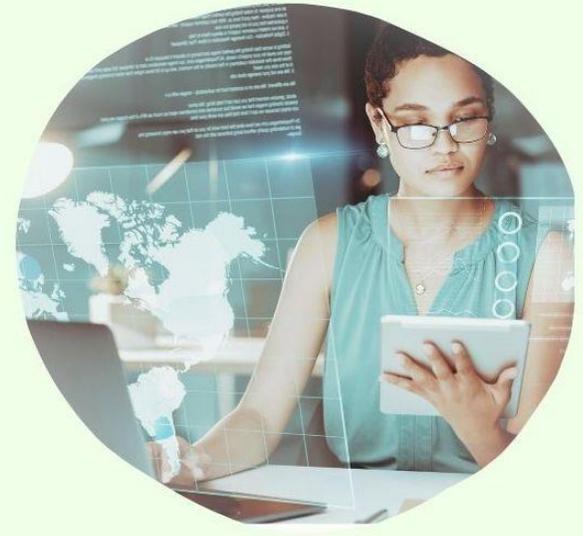
Small Business Registrations & Certifications

- Small business certifications (small business, veteran, MBE/WBE, etc.), if any, are listed next to firms on the DES contract portal page.
- If you obtain OMWBE certification (or your certification status changes) after your contract award, notify the contracting officer so your file can be updated.



Scope & Quote Process

- Agencies will research firms
 - They conduct preliminary research to narrow firms.
 - You should consider what the agency is looking for.
- Outreach process
 - Agencies reach out to vendor(s) of interest to request quotes.
- Agencies may request
 - Technical approach
 - Firm/staff qualifications
 - Price quote (cost for firm's services, materials, and other direct costs related to the scope of work)



Response to Inquiries: Request for Scope of Work, Quotes, and More

Steps in Prospecting: Meetings and Follow Up



Steps	
1	Identify Target Prospects
2	Connect with Target Prospects
3	Initiate and Hold 1:1 Meetings
4	Qualify Target Prospects
5	Nurture Relationship
6	Evaluate to Map Success

Additional Topics

- ✓ Positioning Your Outreach
- ✓ CRM Tracking
- ✓ Email Templates

Step 1: Identify Target Prospects

- Agencies will research firms.
- Reference target client section from **Worksheet _____** to develop target client profiles. Begin by identifying 1 to 3 primary target client profiles.
- Target client profiles will include demographics such as client's sector or industry, agency size, location, in-house capabilities, current contracting resources, budget allocation for your services, and other factors that demonstrate the need for your goods or services.

Step 1: Identify Target Prospects

You should investigate these aspects of your prospective clients:

- **Target departments** – The divisions within the company that require your products or services.
- **Key contacts** – Individuals within the organization who have a need for your offerings.
- **Current resources** – Any personnel or contractors associated with the organization who already supply your products or services, provide related support, or could potentially fulfill the demand for your goods if approached.
- Additional information about your target clients.

Step 2: Connect with Target Prospects - Prospecting

What you need to know before reaching out.

- Research the Agency's mission, purpose, and operations.
- Confirm the agency is a valid prospect for your goods or services.
- Identify the Department most likely to need your goods or services.
- Learn about past purchases and programs related to your work.

Step 2: Connect with Target Prospects – Networking and Visibility



- **Attend government contracting and diversity events** to connect with agency leads and procurement officers.
- **Review agency spending reports** to identify purchasers of your goods or services.
- **Register in government vendor databases** like WEBS and SAM.gov.
- **Leverage small business programs and certifications** to gain access to technical assistance, training, and networking events.
- **Participate in small business and contracting events** hosted by agencies to meet buyers and build relationships through follow-up.

Step 2: Connect with Target Prospects - Determine Method of Contact

- Identify direct contact details for your key contacts.
- Send an email explaining that you hold a statewide contract and are interested in understanding the organization's upcoming needs, so your firm can be prepared to assist them if needed.
- Alternative Approach – Send an email requesting an informational interview with the representative to gain insights into future needs. Clarify that your intention is not to solicit work, but to learn how to better support your clients with quality products and services.

Step 2: Connect with Target Prospects - Contact Methods

- **Follow-Up Emails:** If you don't receive a response to your initial email, consider sending a follow-up email once a week for two weeks. After that, you can follow up once every two weeks.
- **Make a Phone Call:** If your emails go unanswered, try a phone call. Leave a message if needed.
- **Responding to Frustration:** If the representative responds negatively to your outreach or expresses frustration, politely apologize for any inconvenience. Let them know that, as a statewide contract holder, you are available to provide support if needed in the future.



Step 2: Connect with Target Prospects – Identifying the Right Contact

When reaching out to target organizations without a specific contact, consider these steps:

- Call the main phone number and inquire about the person responsible for purchasing the goods or services you offer. You might say something like:
 - “Hi, I am a state-approved vendor for XYZ goods and services, authorized through a procurement process with the WA State DES to supply state-level agencies like yours with XYZ goods or services for the next ____ years. There are only a limited number of vendors like us contracted to your agency. Can you could connect me with the individual who manages the _____ program within your organization? Our goal is to make ourselves available to them for support when needed.”



Step 2: Connect with Target Prospects – Finding the Appropriate Contact

When you don't have a specific contact within a target organization, try these methods:

- Use LinkedIn and your professional connections to identify people who may know the target agency. Determine the best person to approach or ask a colleague if they can introduce you. Contact that individual to set up a 30-minute introductory meeting.
- Look into local industry associations, community groups, and networking events to find representatives from your target organizations. Reach out to these contacts and arrange a 30-minute introductory conversation.

Step 2: Connect with Target Prospects – Small Business Liaison

Many agencies have dedicated staff to support and manage vendor relationships. Consider reaching out to the small business liaison at the agency to set up a 30-minute virtual introductory conversation.



Step 3: Initiate and Hold 1:1 Meetings – Methods for Reaching Out

Reach out to target contact person(s) to introduce yourself and schedule a one-on-one meeting.

- Send the prospect an introductory email.
- Call the prospect and introduce yourself.
- Message the prospect through LinkedIn or other social media.
- Obtain an introduction to the lead from a mutual connection.
- Meet the lead at an event.
- Visit the prospect's office if a drop-in is appropriate.



Step 3: Initiate and Hold 1:1 Meetings – Reaching Out

- When you send your email requesting a half-hour meeting for an initial consultation, attach your capability statement.
- The meeting may be extended to an hour if it fits the potential client's schedule.
- If there's no response within a few days, send a follow-up email or make a phone call.
- Continue following up weekly for up to a month unless it becomes clear your efforts are unwelcome.



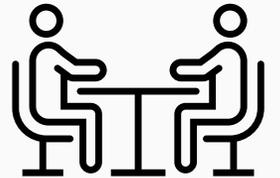
Step 3: Initiate and Hold 1:1 Meetings – Conducting the Meeting

After establishing contact, provide a short introduction and propose scheduling a one-on-one meeting at their convenience.

- Give a concise overview of your firm.
- Present your statewide contract, highlighting its advantages and relevance to them.
- Explain that your goal is to understand the agency better and to position yourself to assist them and similar agencies should a need arise in the future.
- Request permission to arrange a one-on-one meeting.

Step 3: Initiate and Hold 1:1 Meetings – What to Say When You Meet in Person

- Briefly introduce yourself, your company and your goals for the meeting.
- Begin the meeting by asking questions about the agency.
- For Janitorial Services - How is your janitorial program going? Is there anything you'd like to see improve?
- For Change Management Services - Did you implement change management during your last IT program transition? Were you satisfied with the results? What went well? What would you like to see improve?
- For Process Improvement - When was the last time you engaged in process improvement exercises? Have the solutions you developed been successful? What is going well? What would you like to see improve?
- Let the prospect's answers lead to more questions. Use questions to demonstrate your subject matter expertise.



Step 3: Initiate and Hold 1:1 Meetings- Tailoring Your Message

After posing questions, briefly incorporate the following, using the prospect's responses to tailor how you introduce your firm.

- Highlight relevant staff skills and experience that align with the agency's goals and objectives and address the challenges they aim to overcome.
- Emphasize expertise that will contribute to achieving the agency's goals and resolving their issues.
- Detail the firm's and staff's work history, past projects, and performance metrics that are most relevant to the agency's work.

Step 3: Initiate and Hold 1:1 Meetings – Closing the Conversation

- Inquire if they have any further questions for you.
- Thank them for their time and insights.
- Inform them that they can reach out to you whenever they need assistance.
- Propose a follow-up meeting in 6-12 months to stay informed about upcoming needs.
- Let the representative know you intend to share relevant information periodically to help them manage their _____ program effectively and ask if they're comfortable with this.
- Ask if they would be open to receiving your newsletter, explaining its content and benefits.
- Lastly, ask if they know of any other agency representatives you should connect with.

Step 4: Qualify Leads

Do potential customers have the need, budget, and authority to decide on purchasing your product or service?

- **Evaluate the urgency and timeline of their decision-making** to gauge when they might commit.
- **Investigate their business** to confirm they align with your target market in terms of size, industry, and location.
- **Focus on leads that have shown clear interest** through inquiries, engagement, or participation in events.
- **Allocate more time to leads with a strong chance of conversion** while reducing effort on those with less potential.

Step 5: Nurture Relationships

Consistent follow-up is crucial. The majority of your new business will result from maintaining contact with potential buyers rather than from the initial meeting.

- Maintain communication with the representatives you engage with.
- In this field, prospective buyers typically do not commit to purchasing services right after the first introduction.
- Continue to follow up, but ensure each outreach provides value to the client. Avoid reaching out solely to ask if they have work for you, as this can lead to frustration rather than appreciation. Instead, focus on offering something beneficial that encourages a positive response.

Step 5: Nurture Relationships



Possible follow-up actions include:

- Sending brief emails that provide useful industry insights, such as updates on regulations, innovative strategies, or lessons learned from previous projects.
- Reaching out via email or phone about upcoming events and other opportunities to engage with stakeholders, expand industry knowledge, or acquire new skills.
- If suitable, consider inviting the representative for coffee or lunch. However, avoid paying for their meal or offering gifts, as this may create a conflict of interest.
- Scheduling an annual meeting to remain informed about the agency's needs is generally appropriate. Meeting more frequently could imply you are primarily seeking work from them rather than aiming to offer value.

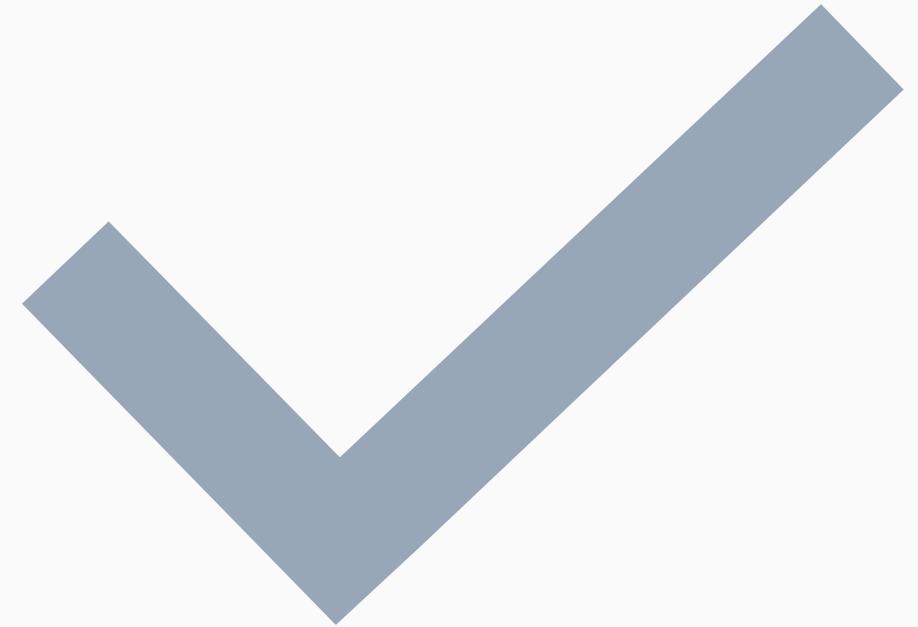
Step 6: Evaluate for Success



Assess the effectiveness of your business development efforts on a monthly basis. In various industries, a successful prospecting program typically requires 6 months to 2 years or more to convert approximately 20-30% of prospects into clients, and up to 5 years to achieve a 30-40% conversion rate.

- How many new potential buyers have you added to your pipeline this month? Are you prospecting sufficiently to reach your success targets or at least your minimum revenue goals?
- What % of your prospects are converting each month? Are you confident that they have a need for your services? Are your value propositions connecting with prospects? If not, consider analyzing competitors' offerings and revisiting your value proposition strategy.
- Are there recurring barriers, objections, or hesitations preventing clients from purchasing your services? If so, consider conducting additional research to develop strategies to address these objections or mitigate their impact.

ADDITIONAL
THINGS TO
CONSIDER



Positioning Your Outreach

It is important to position your outreach as an attempt to learn more about the target agency's needs and build a long-term relationship. Consider it an "informational interview."

Focus your relationship on adding value to the agency and demonstrating your abilities in subtle ways. This will make the agency representative feel like you're a trusted partner, rather than someone trying to make another sale for their company.

Positioning Your Outreach

Focus on building a connection rather than trying to secure work for your firm. Agency staff will be more likely to meet with you and develop a relationship if they don't feel you are just trying to sell to them. They know you are looking for work, but if you build the relationship well, you may be one of the firms they contact when they need help. They might even choose to hire you directly without asking for quotes from other firms if they believe you can meet their needs.



CRM Tracking



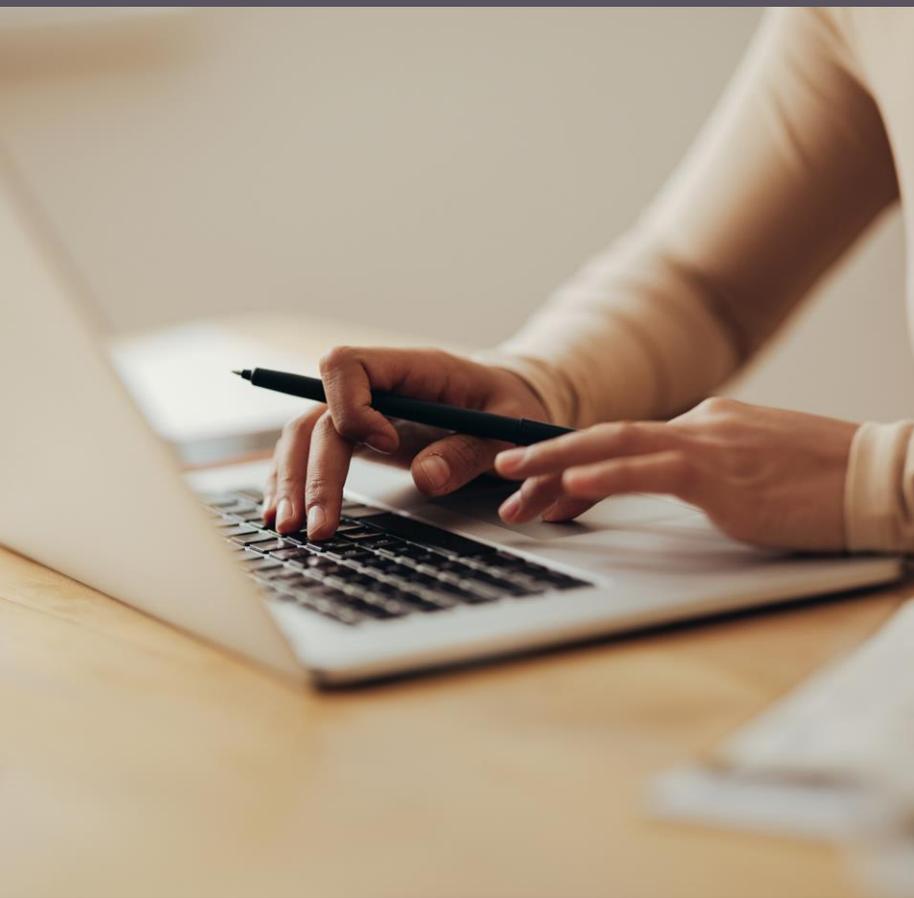
Customer-Relationship Management (CRM) systems are effective tools for monitoring your prospects and leads. They enable you to:

- **Consolidate customer information** – store all client interactions, contact details, and history in a single location, eliminating the need for spreadsheets or relying on memory.
- **Enhance customer engagement** – keep track of communications and follow-ups to deliver tailored service, foster loyalty, and boost retention. You can also manage email campaigns directly through the CRM.
- **Gain insight into sales and marketing** – oversee sales pipelines, automate repetitive tasks, and understand the factors that drive conversions.
- **Make data-informed decisions** – utilize reports and analytics to identify trends and evaluate performance over time.

Email Templates

Invest time in creating email templates.

- **Maintain Brand Consistency** – ensure every message aligns with your company’s style, tone, and design guidelines.
- **Enhance Time Efficiency** – reduce effort by reusing pre-built layouts instead of designing each campaign anew.
- **Present a Professional Image** – send well-organized, polished emails that boost your credibility with recipients.
- **Boost Performance** – templates can be fine-tuned and A/B tested to improve open rates, click-through rates, and conversions.
- **Support Scalability** – simplify sending campaigns to large audiences while preserving personalization and quality.



Reminder Before Q&A: Next Session

Wednesday
November 5
6:00 – 7:30 pm

Online Presence: Reputation-Building with Agency Buyers Through Organic Reach

Improve your online presence and demonstrate capabilities using LinkedIn, Google Business, and other platforms to strengthen your brand, increase visibility, build a positive reputation, and demonstrate proof of performance.

Q & A: RESPONSE TO PROSPECTING?

What questions do you have regarding the process of finding new clients?



Q & A: Statewide Contracting

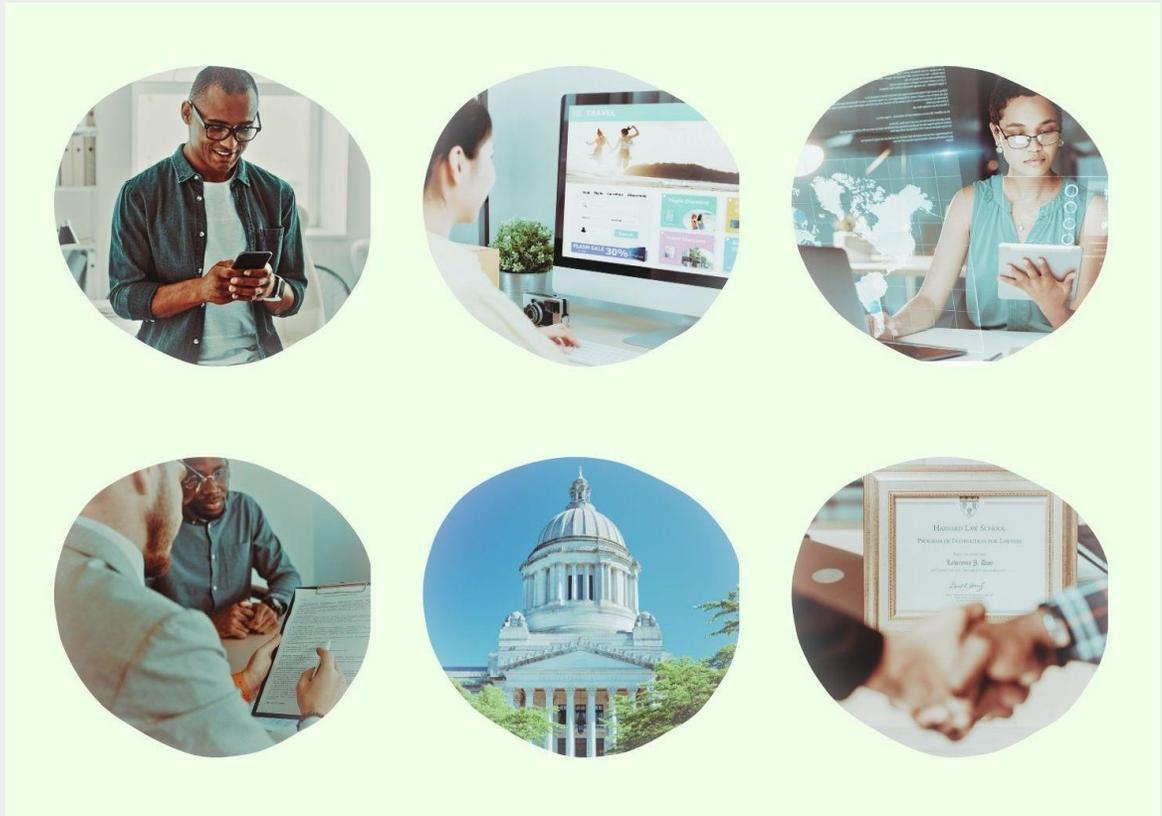
What questions do you have about managing or marketing your statewide contract, WEBS, reporting, or other topics?



Closing

- Thank you to DES for sponsoring the Learn & Grow: Statewide Contract Holder Workshop Series!
- If you need support, reach out for resources.
- The workshop presentation and handouts will be emailed to you.
- Next workshop is **Materials That Market: High-Impact Templates and Tools** on Wednesday, November 5th, at 6:00 pm.

THANK YOU!
See you in two weeks.



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