



7 Secrets to Winning New Clients With IT Assessments

Winning New Clients Is Just the Beginning!

Clients are the lifeblood of your business. Without clients, there is no business. That's why it is critical to maintain a healthy pipeline of new clients coming in through the door, and why it is essential to do the right things to retain, strengthen and grow the client relationships you already have.

For an MSP, performing IT assessments through the entire client lifecycle is one of the most important keys to sustaining long-term client relationships. IT assessments help you keep your virtual fingers on the pulse of each company and generate essential reports that you need to maintain the high level of communication that's essential for healthy long-term relationships.

What better way to win new clients than to introduce them to the power and value of IT assessments as part of your new business pitch? With the right tools and the right approach, you'll find IT assessments are hands-down the fastest, easiest and most predictable way to win new business.



The Seven Secrets Revealed

We've used feedback from hundreds of MSPs over the years to create a proven, seven-step strategy for winning new clients:

- **Lead with value**
- **Have a secret weapon**
- **Beware of time traps**
- **Show your worth**
- **Protect your position**
- **Set expectations**
- **Craft a winning proposal**

In this eBook, we go through each step, elaborate on it and tell you how it's done.

Let's get started!



Step 1: Lead With Value

Over 70% of B2B buyers want a personalized customer experience.*

Get to know a potential customer's business before you dive into selling. Understand the problems you're trying to solve and empathize with your prospect.

Chances are good that if you don't know their business and you personalize your approach, you won't be able to propose the best solutions and win their trust.



*75+ B2B Marketing Statistics to Know in 2020, BlueCorona.com

How It's Done

Do Your Research

The more you know about your prospective clients, the more you will impress them.

If the prospect was referred to you by a friend or colleague, ask them to tell you everything they know about the company and the person you'll be meeting. Focus on what their IT pain points are.

If you are networking, focus on **their** business, not yours. Ask as many questions as you can about their business goals, their products or services, and what issues or opportunities **they** see. Also, find out how they are getting their IT done today.



Step 2:

Have a Secret Weapon

Clients don't know what they don't know!

Even if you spend a lot of time researching your prospective clients before your first meeting, there's only so much you can learn about their IT environment.

And even if you spend hours interviewing them and walking around their offices, you'll never get a true picture of the shape of their IT environment without a comprehensive audit of their entire network, computers, users, asset details, configurations, cloud deployments and the like.

But how do you get such a detailed snapshot of a prospect's IT environment in the short amount of time that you have during an initial meeting?



How It's Done

Non-Intrusive Data Collectors

The ideal IT assessment tool uses **non-intrusive** data collectors that can quickly scan networks, computers, Active Directory, local machines, and even go into the cloud - all without the need to install any agents, software or probes.

You don't want to make any changes to the prospect's network (i.e. do no harm) or leave any **digital fingerprints** that the scan was ever run, in case there is an incumbent MSP that your prospect doesn't want to tip off.



Step 3:

Beware of Time Traps

Collecting all that data is essential
but the hard part is still to come.

Some assessments just spit out raw data, leaving it up to you to do the hard work of analyzing, organizing and formatting the data into a compelling and professional-looking presentation that does the **selling** for you.



How It's Done

A best-in-class IT assessment tool **automatically** turns the data you collect into **actionable** reports that you can instantly brand as your own and present to a client, or use to bolster a managed services proposal.

You'll want to generate several different kinds of reports, including a short, easy-to-read, client-facing **risk report** that summarizes all the issues and security risks you discovered, plus a thick binder of all the raw data you collected that you can drop on the conference room table with an impressive **thump**, demonstrating how comprehensive your assessment is. Allow the prospect to thumb through the binder, but don't let them have it unless they sign up with you.



Step 4:

Show Your Worth

One important thing to decide when using an IT assessment as part of your new pitch is whether or not to charge the prospect for doing the assessment.

Many MSPs offer a **free IT assessment** as part of their offer to make it more compelling. However, the reason they can offer it for free is because they have the right tools to perform the actual assessment at a low cost. Plus, with a high close rate, it's easy to absorb it as a cost of doing business.

Other MSPs, on the other hand, charge a fee for performing the assessment. However, if the prospect enters into a managed services contract with the MSP, the assessment fee will be waived.



How It's Done

MSPs can charge anywhere from **\$1,500** to **\$10,000** for an IT assessment, depending on the size and complexity of the prospect's environment.

The price you charge should be based on the local economy, the size of the client network you are going to assess and the nature of your competition.

If you can drum up enough prospects who are willing to pay an upfront fee to do the assessment, take that approach. If you aren't getting enough action that way, offer a free assessment. However, make sure you state your normal charge in your promotion so the prospect appreciates the **value** of your offering.



Step 5:

Protect Your Position

Getting a detailed IT assessment is pretty exciting for many SMB decision makers.

Request a meeting to deliver the IT assessment results. You're providing a valuable service, and in exchange, all you're asking for is the opportunity to present your findings to decision makers and discuss how you can be part of their solution.

But sharing too much information in your "free" assessment allows the recipient to take your report and price shop competitors. To avoid unintentionally divulging your playbook, focus heavily on the issues discovered and the associated risks, but not specific details of what you have discovered.



How It's Done

Use the data from your automated IT assessment to identify core issues and explain the risks. Provide concrete evidence, including the number of devices with the issue or the number of issues discovered by type.

Here are some things **not** to do:

1. Don't provide any assessment details during your first on-site visit.
2. Don't provide an overly detailed remediation report that could be used to price shop your competitors. Keep information at a high level.
3. Don't just email your assessment. Whether your meeting is in person or conducted virtually, be sure to personally present the results.



Step 6: Set Expectations

After a prospect agrees to receive an IT assessment, it's important to set expectations.

Let your contact at the prospect company know:

- When you'll be there
- How long it'll take
(Tip: Best practice is under one hour)
- What access you'll need to conduct the assessment
- When and how they can expect to receive feedback
(Tip: Personally presented within a week)

Be sure to emphasize that no feedback will be provided during the initial meeting.



How It's Done

An email like this one is a great way to set expectations with prospects prior to going on-site.

Hi Rita,

We're looking forward to conducting your free, no-obligation IT assessment on Friday, December 9 at 2 p.m. EST. The appointment should only take around 45-60 minutes.

During this time, we'll chat through your challenges and use a non-intrusive tool to scan your network for potential issues.

The only thing we'll need from you in order to conduct the scan is for a member of your team to type in the domain admin access/password credentials while we're on-site.

It's important to note that in rare cases the scan can't be run due to pre-existing IT network issues, but we can still provide helpful recommendations.

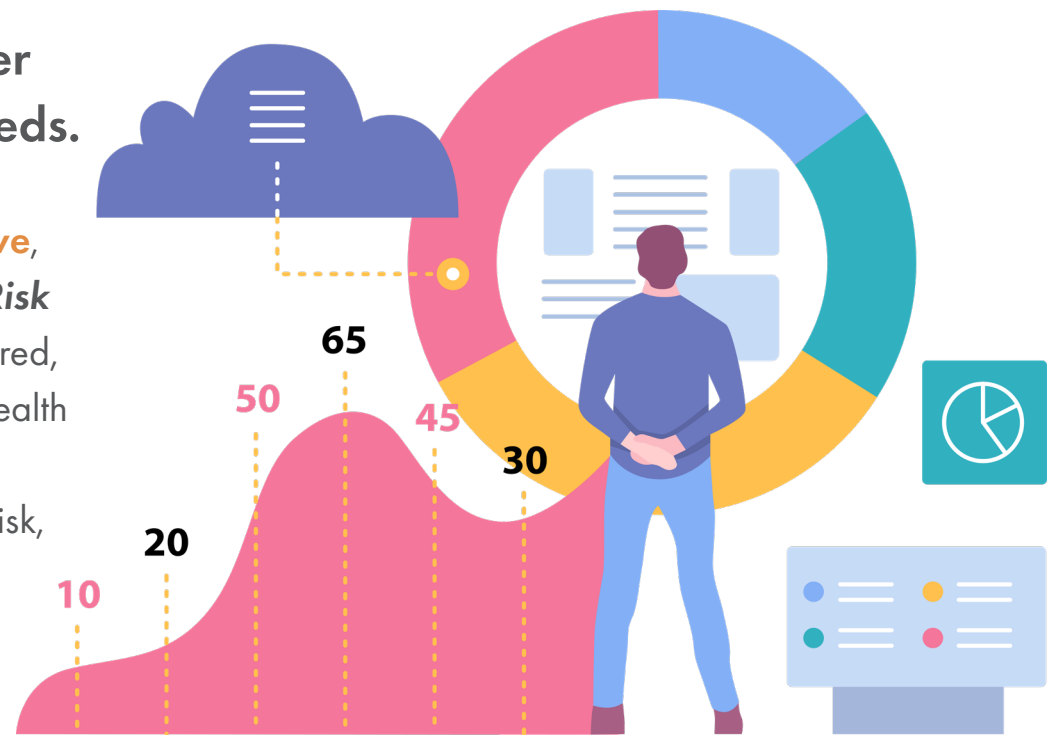
After the assessment scan is successfully completed, you can expect a follow-up meeting with us in the week that follows. At this session, we'll deliver our findings and walk you through each part of the assessment. Let me know if you have any questions.

Best Regards,
Tom

Step 7: Craft a Winning Proposal

With the data you collected from the IT assessment, you can start building a clearer picture of your prospect's IT health and needs.

If you're using an IT assessment tool like **Network Detective**, you'll receive a professional-looking and branded **Client Risk Report** revealing the types and quantities of issues discovered, along with a proprietary risk score to quantify the overall health of your prospect's network. It will also generate a separate **Management Plan** that provides details of each issue or risk, the level of severity and recommended steps to remediate the issues.



How It's Done

Use the Management Plan as your source to quote a detailed, one-time remediation plan, prioritizing items from most to least urgent, along with a description of what your managed services offerings look like. Comparing the two will help frame out the relative value of your offerings.

This approach will help you position yourself as a **trusted advisor** by providing a high-level breakdown of each risk area, why it needs to be addressed and a remediation plan.

Use the remediation project as an opportunity to talk about your ongoing managed services. Talk about the value of how your fixed monthly fee will maintain the network and computer systems, make employees more productive, prevent small issues from growing into large remediation projects, and, most importantly, reduce the likelihood of a data breach due to unpatched systems.



Every Day, MSPs Around the Globe are Employing These Strategies to Win New Business

With this seven-step approach to winning new clients, you can build a scalable, efficient and proven path to expanding your client base.

At the core of this strategy is the **IT assessment**. Thousands of MSPs are already enjoying the benefits by adding a non-intrusive IT assessment tool with automated reporting capabilities to their existing suite of sales tools.

Remember that winning new business is just the beginning. You'll want to continue using the very same IT assessment tools throughout the client lifecycle including:

- **Onboarding new clients**
- **Building trust through regular reporting**
- **Optimizing service delivery to improve profits**
- **Growing relationships by upselling and expanding your services**
- **Retaining your clients when contracts come up for renewal**

Discover why so many MSPs choose **Network Detective** as part of their overall client lifecycle management strategy. [Click here to learn more.](#)

