

Welcome to SGC TECH AI

DAY 1 — FOUNDATION

Who We Are

Transforming B2B sales through precision, AI, and client-centric engagement.



PRECISION



AI-POWERED



CLIENT-CENTRIC



TRUST & SECURITY



DAY 1 — FOUNDATION

The Mistake Most Companies Make

Pitching before diagnosing.



The 5 Operational Diseases

- 01** Ineffective Targeting
- 02** Premature Pitching
- 03** Failure to Diagnose Pain
- 04** Weak Meeting Frameworks
- 05** Ignoring Gatekeepers



Who Do We Talk To?

Ideal Customer Profile



Firmographics & Size

Define the types of companies that best fit your solution.



Industry & Technology Stack

Identify the industries you serve and the technologies they use.



Pain Points & Triggers

Uncover the challenges they face and what motivates them to act.



Who

Roles & personas



Technology

Tools, platforms & tech stack



Pain

Challenges, pain points & business impact

ICP Classification

Good Lead

- ✓ Fits ICP criteria
- ✓ Clear pain points
- ✓ Decision maker access
- ✓ Budget aligned

Bad Lead

- ✗ Outside target profile
- ✗ No identified pain
- ✗ No authority
- ✗ Budget mismatch

10x

HIGHER REVENUE GROWTH
WITH STRONG ICP ALIGNMENT



3.2x

HIGHER WIN RATE



2.7x

SHORTER SALES CYCLE



2.5x

HIGHER DEAL VALUE



1.8x

BETTER CUSTOMER
LIFETIME VALUE

DAY 1 — FOUNDATION

Pain Discovery Questions

Never Pitch, Ask

- Identify the real problem
 - Understand impact & cost
 - Explore current solutions
 - Quantify the opportunity
-

HANDLING PRACTICE
BUILD SKILL. STAY SHARP.



SALES GYM
PRACTICE. IMPROVE. WIN.



CALL ANALYSIS
LISTEN. LEARN. LEVEL UP.



The Meeting Booking Framework



- 1 Contextualize the Impact
- 2 Establish Relevance
- 3 Propose a Specific Time
- 4 Confirm & Close



The Formula in Action

The Meeting Ask

Relevance + **Pain** + **Impact** = **Action Meeting**
Make it personal Make it specific Make it valuable

AI Personalization Engine

Who are you targeting?

Describe your ideal customer to generate highly personalized outreach.

Describe your ideal customer...



Target Personas



Sarah Mitchell
VP of Marketing



David Chen
COO





Rachel Johnson
Director of Operations



Michael Torres
Head of Sales

AI Generated Insights

 Key Priorities

 Top Pain Points

 Business Impact

Recommended Outreach Angle

“Helped similar companies in your industry reduce costs and improve efficiency with measurable results.”

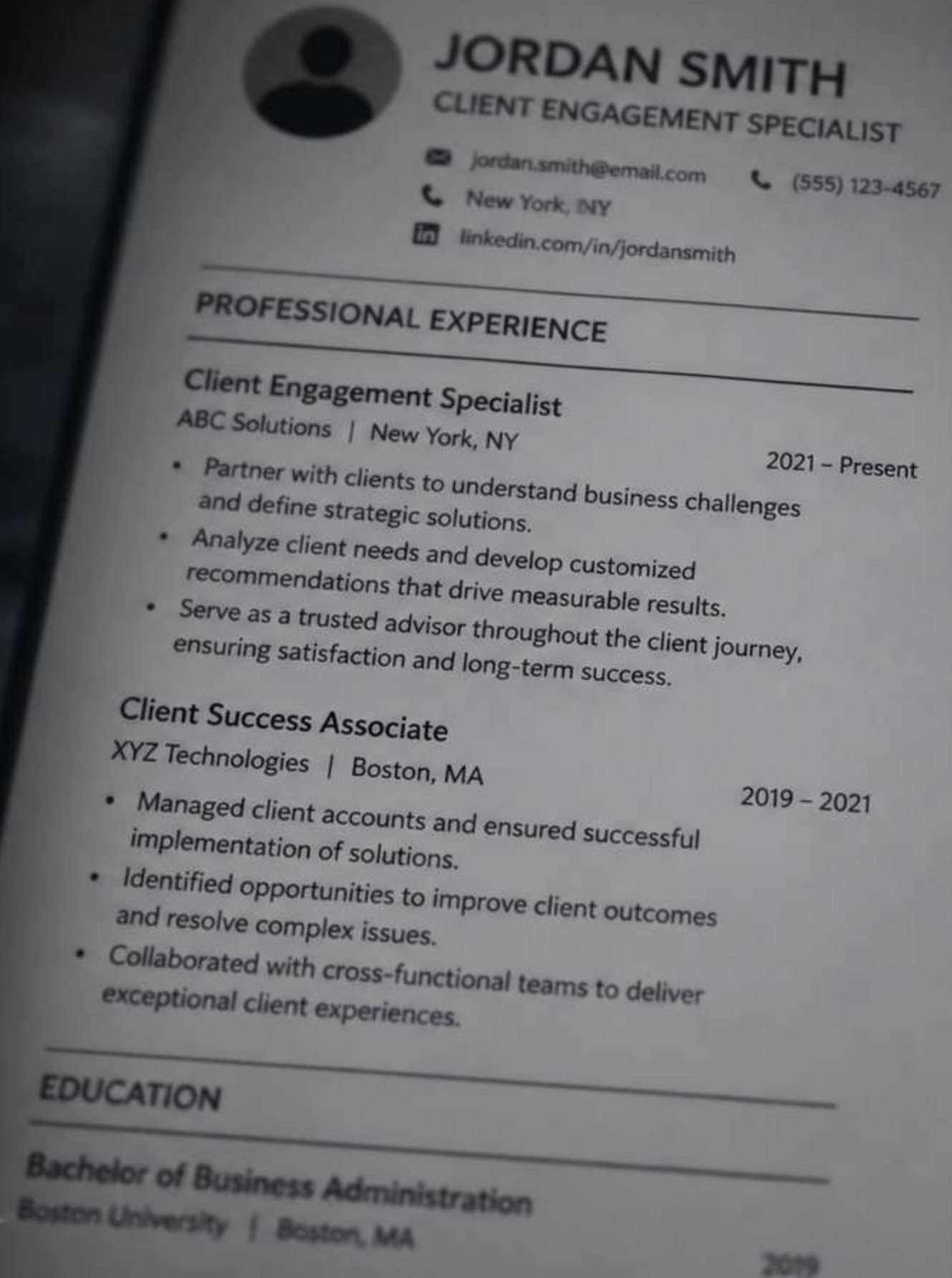
DAY 1 — FOUNDATION

The Role of a Client Engagement Specialist

You are not a salesperson.

You are a **consultant**, and **problem solver**.

Your goal is to diagnose issues and prescribe solutions, not just sell products.



Diagnose First, Prescribe Second

“Don’t be a **Pitcher**, be a **Doctor**.”



The Pitcher

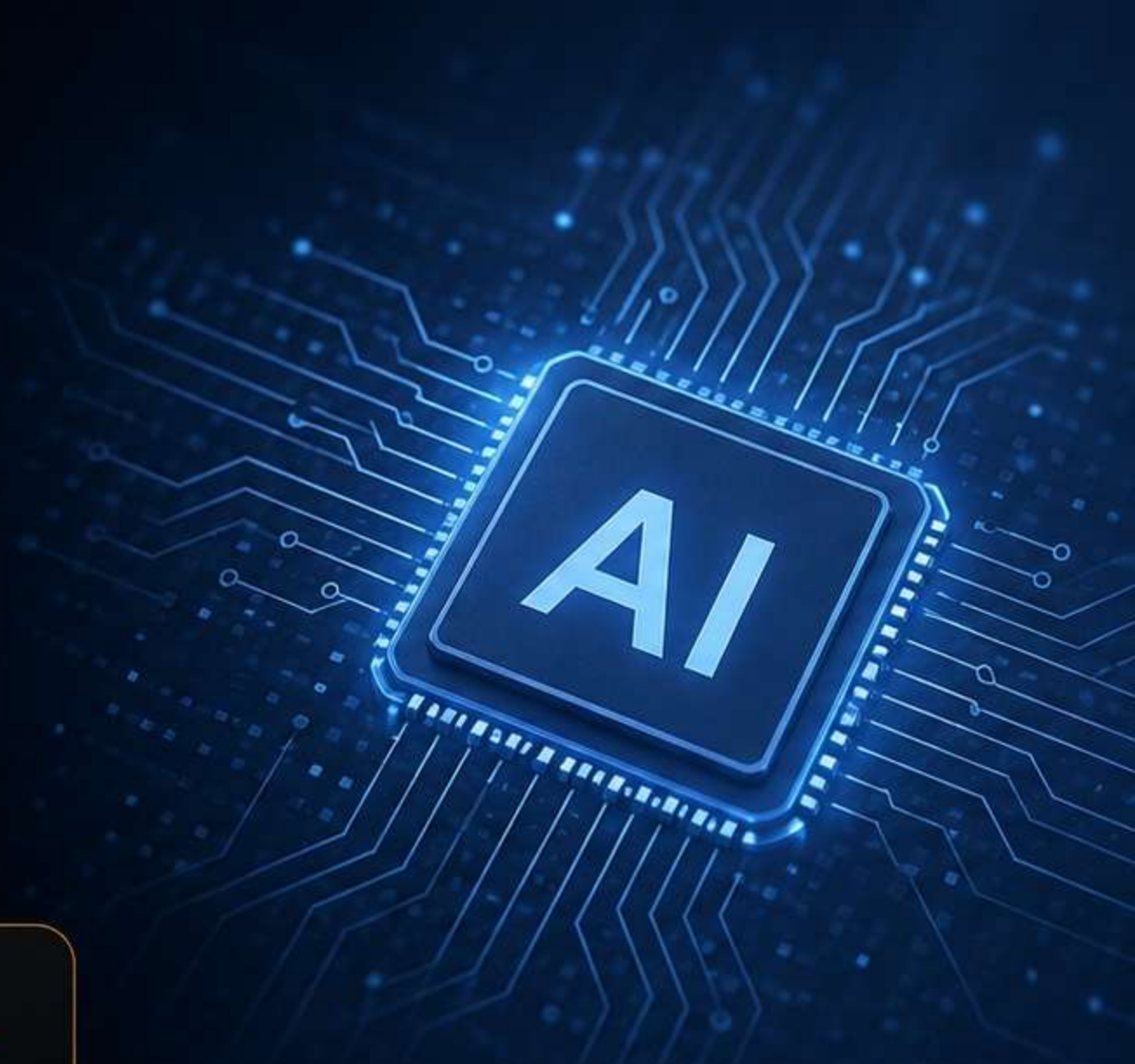
Assumes the problem,
offers solutions
immediately, often
misses the mark.



The Doctor

Asks questions,
identifies pain,
prescribes only what
is needed.

AI Ops
Platform



The Two-Stage Call Flow

1

Discovery

Diagnose the pain.
Understand the impact.
Qualify the opportunity.

2

Prescription

Present the solution.
Handle objections.
Close the commitment.

COMPARISON OF OUTBOUND SALES ROLES



SDR

SALES DEVELOPMENT
REPRESENTATIVE

Creates business
context by initiating
conversations and
qualifying
opportunities.



BDR

BUSINESS DEVELOPMENT
REPRESENTATIVE

Creates business
context by identifying
and engaging key
decision makers to
open doors.



BANT Qualification Wheel

B BUDGET
Does the prospect have the financial resources to buy?

A AUTHORITY
Is the contact the decision-maker or influencer?

N NEED
Does the prospect have a business problem we can solve?

T TIMELINE
Is there a compelling event or deadline for implementation?



Handling the Gatekeeper

- **Respect** the Gatekeeper's role—they are doing their job.
- Be **Direct & Professional** : "I'm calling for [Name] regarding [Specific Topic]."
- **Never Pitch** the Gatekeeper. They cannot make decisions.
- Call **Before/After Hours** to bypass standard screening.
- Use the **Name of a Colleague** or Referral if applicable.



DAY 2 — PROSPECTING & EXECUTION

Prospecting & Execution

Transforming Strategy into Action:
Mastering the Execution Phase

Laure Métier
Product Manager



MAESTRO

CRM Discipline

- **Every Activity Logged:** No exceptions, no "mental notes".
- **Real-Time Updates:** Log immediately after the call.
- **Detailed Notes:** Capture pain, next steps, and sentiment.
- **Pipeline Hygiene:** Move deals forward or disqualify them.

SALES METHODOLOGY



TARGET

Identify the right opportunities.



ENGAGE

Start conversations that matter.



DISCOVER

Uncover pain and define needs.



SOLUTION

Position the right solution.



CLOSE & GROW

Close, onboard, and expand value.

The Top 3 Objections

1. “We don’t have the budget”

Response: Refocus on ROI and cost of inaction.

2. “We’re already using [Competitor]”

Response: Highlight differentiation and pain points with current solution.

3. “Not the right time”

Response: Emphasize urgency and the cost of delay.



DAY 2 — PROSPECTING & EXECUTION

The First 30 Seconds

The Opening Framework

- **Pattern Interrupt:** Break the standard script.
- **Context Setting:** “I’m calling because...”
- **Permission Ask:** “Do you have 30 seconds?”
- **Value Proposition:** The “Why” for them.



DAY 2 — PROSPECTING & EXECUTION

Mock Call Assessment



Opening

Pattern interrupt, credibility, permission to speak



Discovery

Pain questions, active listening, probing



Value Prop

Solution aligned to pain, clear ROI



Closing

Next steps, objection handling, commitment



DAY 2 — PROSPECTING & EXECUTION

Your KPIs



50+

Calls Per Day



3+

Meetings Per Week



100%

CRM Logging



2+

Proposals Per Week



GEORGETOWN
UNIVERSITY



VANDERBILT
UNIVERSITY



DAY 2 — PROSPECTING & EXECUTION

CES Foundation Certification

- ✓ Complete all bootcamp modules
- ✓ Pass the Mock Call Assessment
- ✓ Achieve 30-Day KPI targets
- ✓ Demonstrate CRM discipline

**CERTIFIED CLIENT
ENGAGEMENT SPECIALIST**


BOOTCAMP
— **2026** —
FOCUS. EXECUTE. GROW.





Thank You

Your journey to becoming a
top-performing
Client Engagement Specialist
starts now.



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Exercise 1 — Diagnose the Disease



Identify the Symptoms

Can you spot the operational disease in these scenarios?

- **Scenario A:** “We call everyone in the database.”
- **Scenario B:** “We present our product immediately.”
- **Scenario C:** “We log data when we remember.”

