

Business Development Kit

Qualify the right relationships, start relevant conversations and keep every next step visible.

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I use business development to create a useful next conversation with a well-chosen account or partner. Start with fit and a reason to talk. Keep the request small enough for the other person to evaluate.

Business / owner / target market / review date

Ideal account and partner profile

Dimension	Target account	Potential partner
Customer overlap / segment		
Problem or trigger we can help with		
Decision-maker / relationship owner		
Capability needed / value we contribute		
Capacity, geography or delivery constraints		
Exclusions / conflicts to check		

Define the next useful outcome

An account may need a discovery conversation. A partner may need a joint-fit discussion, a shared workshop or one agreed introduction. Do not ask for referrals before explaining who benefits and how follow-up works.

Why this organization / observed context / source and date

Specific next step / value to the other side

Templates in this kit use [bracket] placeholders. Replace each with verified context. Remove any sentence you cannot support.

A short email sequence

Choose one relevant observation and one request. Do not invent familiarity, use false urgency or imply a result you have not delivered. Keep the follow-up in the same thread when that preserves context.

01 / First note

Subject: A question about [specific workflow]

Hi [Name],

I noticed [verified context and source]. Is [specific problem] something your team is working on?

I help [type of business] with [concrete scope]. A useful first step could be [small relevant next step]. Would that be relevant, or is someone else responsible for [workflow]?

[Your name]

[Role / company]

[Contact details]

02 / Useful follow-up

Hi [Name],

Following up on [topic]. One question I would check is [specific diagnostic question]. I can share [real checklist, sample or useful resource] if it helps you assess that.

Would you prefer [small next step] or for me to close this thread?

[Your name]

03 / Close the loop

Hi [Name],

I have not heard back, so I will close this thread for now. If [problem or timing] becomes relevant, you can reach me at [contact]. Thanks for considering it.

[Your name]

Partner variation

Replace the service pitch with: We both work with [shared customer type]. You provide [their capability]; we provide [your capability]. Would a short fit discussion help us decide whether [one joint activity] is useful?

Observation / useful asset / clear ask to personalize

LinkedIn and WhatsApp sequences

Choose the channel that fits the relationship. These are alternative sequences, not extra touches to stack on the email sequence. Stop on a decline, an opt-out or a request to use another channel.

LinkedIn / professional context

01 / Connection note

Hi [Name], your [verified post, role or project] relates to [shared topic]. I work on [relevant area] and would like to connect.

02 / After acceptance

Thanks for connecting, [Name]. I am exploring how [type of team] handles [specific workflow]. Is [problem] relevant in your context? I can share [real useful resource] if helpful.

03 / One follow-up

Hi [Name], circling back on [topic]. Would [specific small next step] be useful? If the timing is wrong, I am happy to leave it here.

WhatsApp / expected contact

01 / Context and identity

Hi [Name], this is [Your name] from [Company]. You [requested / agreed to] contact about [topic] through [source]. Is this a good place to continue, or would you prefer [channel]?

02 / Helpful next step

Following up on [agreed topic]. Here is [requested item or concise answer]. Would you like [two useful options or one next step]? [Your name]

03 / Close or reschedule

Hi [Name], should I close this for now or follow up in [period]? If you prefer no more messages, let me know and I will update our records.

Before using the templates

- ☐ The recipient can identify you and understand why you contacted them.
- ☐ For WhatsApp, record expected contact or permission and confirm account sending rules.
- ☐ Check whether the connected account requires an approved template for this message.
- ☐ Replace every placeholder and test links before sending.
- ☐ Record channel preference, replies and the next agreed action.

Preferred channel / permission source / agreed next step

Make follow-up deliberate

Use a bounded cadence, then move on. A reply changes the plan immediately: answer the question, agree a next step or close the record. Never let an automated sequence continue over an active conversation.

Example account cadence - suggested timing, not a performance claim

Timing	Touch	Purpose / stop rule
Day 1	Initial email	State verified context and ask one useful question.
Day 4	Reply in the same thread	Offer one relevant diagnostic or real resource. Stop if declined.
Day 8	Optional LinkedIn conversation	Use only if connected and appropriate. Skip if it duplicates another active conversation.
Day 12	Close-loop email	Close the sequence. Record silence as no response, not as a qualified opportunity.

Example warm WhatsApp cadence - use instead of the account sequence

Timing	Touch	Purpose / stop rule
Day 0	Confirm context and channel	Respond to the expected inquiry or agreed contact.
Day 2	One useful follow-up	Answer the open question or supply the requested item.
Day 7	Close or agree a date	Stop without a response; schedule only an agreed next step.

Reply handling rules

- ☐ Interested: assign an owner and offer a specific next step.
- ☐ Not now: record the reason and any agreed future date.
- ☐ Wrong person: request a relevant introduction without assuming permission.
- ☐ No fit: record the reason and close the sequence.
- ☐ Opt-out: suppress future outreach on the requested channel and update the record.

Our response owner / response window / escalation backup

Our maximum touches / stop rule / nurture permission rule

Run a conversation that changes a decision

Use the questions as prompts, not an interrogation. Listen for a concrete recent event, the impact of leaving it unresolved and how the organization actually buys. Ask permission before moving into a deeper diagnosis.

Suggested 30-minute discovery flow - example allocation

Time	Script / prompts	Capture
0-3 min	What would make this conversation useful? May I ask about the current process and then discuss fit?	Purpose and agenda agreed.
3-10 min	Walk me through the last time [problem] happened. Who was involved? What did you try?	Current process and evidence.
10-16 min	What does that affect? What happens if nothing changes? How would you judge improvement?	Impact, priority and desired outcome.
16-22 min	Who else decides? What constraints, budget process or alternatives matter? What must happen before approval?	Buying process and constraints.
22-27 min	Here is the scope I think may fit: [scope]. What have I misunderstood?	Fit, exclusions and unresolved questions.
27-30 min	Is [specific next step] useful? Who owns it, by when, and who should join?	Mutual action and date.

Read back what you heard

You are trying to [job] because [trigger]. Today [current state]. Success would mean [buyer-defined outcome]. We still need to confirm [unknown]. The next step is [action / owner / date]. Is that accurate?

Buyer-defined problem and impact / evidence

Decision participants / process / unresolved constraint

Next action / owner on each side / due date

Use BANT and MEDDIC as evidence prompts

Qualification is a fit decision. Mark each answer confirmed, assumed or unknown. An unknown can justify another conversation; it should not become a positive answer in the CRM.

BANT - a compact first-pass check

Element	What to establish
Budget	What resources are available, or how could funding be approved?
Authority	Who approves the purchase, and what role does this contact play?
Need	Which concrete problem makes this work valuable?
Timing	What event or deadline creates a realistic buying window?

MEDDIC - a deeper view for complex opportunities

Element	Question / evidence to capture
Metrics	Which buyer-owned measures define the value or success?
Economic buyer	Who controls the funds and can approve the commitment?
Decision criteria	What requirements will the buyer use to compare options?
Decision process	What steps and participants lead to a decision?
Identify pain	What problem has consequences if it remains unresolved?
Champion	Who has influence, benefits from the change and actively helps it move?
Competition	Which vendors, internal solutions or status-quo options compete?

A friendly contact is not automatically a champion. Confirm helpful actions and influence. Add procurement, security or contract steps to the decision process when they apply.

- ☐ Need and delivery fit are supported by specific evidence.
- ☐ Decision roles and the next buying step are understood.
- ☐ Critical unknowns have an owner and a plan to resolve them.

Fit decision: proceed / investigate / nurture / close, with reason

Write a proposal the buyer can evaluate

A proposal confirms a shared understanding. Send it after you know the problem, fit and decision process. Use plain scope and acceptance criteria so the buyer can compare the commitment with their needs.

Proposal outline and drafting worksheet

Section	Include	Your notes
1 / Context	Buyer situation, problem and desired change, confirmed in discovery.	
2 / Scope	Deliverables, boundaries, exclusions and customer responsibilities.	
3 / Delivery	Phases, people, dependencies, access and working rhythm.	
4 / Acceptance	Observable checks, review owner and how issues are handled.	
5 / Commercials	Price basis, payment milestones and change-request process.	
6 / Evidence	Relevant work or a sample you have permission to share.	
7 / Decision	Open questions, approval steps, owners and proposed start conditions.	

Make acceptance testable

Weak: CRM is complete. Stronger: a test inquiry creates one contact, one owned opportunity and a dated task; a booking and an opt-out each follow the agreed path. Adjust the checks to the scope.

One deliverable / acceptance check / approving owner

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- ☐ Every promised item is in scope, costed and assigned.
 - ☐ Buyer responsibilities and dependencies are explicit.
 - ☐ The buyer knows the next decision and who needs to participate.

Proposal review date / buyer participants / next step

Keep the next action visible

The relationship tracker is a working queue. Record useful context and the next mutual action, not a growing list of names. For partners, track the shared activity and what each side owes.

Stage definitions for this tracker

Stage	Entry evidence / next question
Targeted / connected	Fit hypothesis recorded / relevant contact established.
Discovery / qualified	Problem explored / fit and buying process supported.
Proposal / active	Scope under review / agreed work or collaboration underway.
Nurture / closed	A future reason to reconnect is agreed / no active next step.

Relationship tracker - one row per active relationship

Account / partner	Stage / contact role	Last useful touch / date	Next action / owner	Due date / evidence

Weekly relationship review

- ☐ Every active record has an owner and a dated next action.
- ☐ Overdue actions are completed, renegotiated or closed.
- ☐ No-response records are not counted as qualified pipeline.
- ☐ Partner introductions have a recipient, a purpose and an agreed handoff.

Most important relationship action this week

Want help implementing this?

Bring your completed worksheets. I can help turn your next decision into a working growth system.

shoebloodhi.com/contact