TAILWIND FIELD GUIDES

Make your prospecting time count.

Four steps to have the right people and the next move ready when it’s time to sell.

4 steps | 7 minute read Includes a practical worksheet

Karl Schaphorst spent 20 years selling HVAC before becoming a Sandler trainer. Lisa Schnare helped four tech startups build sales-development teams from the ground up. Their experience speaks to a familiar problem: the prep work has swallowed prospecting. You’ve set aside the time, but you’re still gathering data when you should be making calls.

In this guide, we take excerpts from our interviews with these two sales pros to deliver a quick, practical tutorial on how to prepare your prospecting in four steps and keep deals, meetings, and admin from taking up your prospecting time.

Read on, then put their advice to work with the accompanying worksheet. You’ll know who to contact, what happens next, how to refill the list, and what needs to get out of your way.

01 Prepare the list
02 Decide what comes next
03 Refill the list
04 Clear what’s in the way

01 Have someone ready to contact.

Karl separates getting ready from getting in touch. If you still need to find a number or work out why someone belongs on the list, that's preparation you haven't finished yet.

> "The system has to be there ready to turn on."
>
> **Karl Schaphorst**
> President, Karl Schaphorst & Associates · Sandler trainer

A big database can still leave you with nobody ready to call. For each person, have a role, a checked way to reach them, and a reason to talk. Keep an unconfirmed need as a question.

An illustrative entry: Morgan, operations lead; opening a second office; work number checked; ask who is arranging IT support for the new site. As a founding AE, you could build these entries with the founder, starting with one customer segment.

Watch Karl explain where the prospecting hour goes ↗

Still gathering data when it's time to call? Karl describes the trap and why the work needs to be ready first.

From Topsail's interview with Karl Schaphorst
45 seconds · Opens on YouTube at 12:39; watch to 13:24.

Get the first contact ready

- Choose a group that fits your customer criteria. Keep the list where you'll use it.
- On the worksheet, write the first contact, your reason to talk, and the next prospecting block.

You're ready when: You can contact the first person without starting another search.

That prep is real work. With **Topsail ONE, we prepare the contacts around your customer criteria**. Sourcing, qualification, research, and verification happen before they reach your queue.

02 Know what happens after each touch.

Karl calls his working list a **prospecting box**. There's room for a set number of people, a rhythm for contacting them, and a clear reason to move someone out. You're giving each call somewhere to go.

A meeting	A clear no	No response
Move it into your pipeline. Record the agreed next step.	Remove it from active outreach. Respect the answer.	Follow up as planned. Check that they still fit and you can reach them.

Karl calls his established network weekly. That's his rhythm; yours may need a different pace or channel. Applying his example, "Tuesday: no answer" becomes "call next Tuesday," with a review if the contact no longer fits. A result needs a next move.

Before you start, choose your follow-up channel, date, and stop or review condition. An explicit no ends active outreach. An unanswered call does not tell you whether the person needs you.

Watch Karl set the rules for his prospecting box ↗

Karl explains who stays on his list, who comes off, and how often he calls. Use his example to work out your own rules.

From Topsail's interview with Karl Schaphorst

48 seconds · Opens on YouTube at 14:18; watch to 15:06.

Write the rules once

- Write what you'll do after a meeting, a no, and no response.
- After each touch, record the result and a specific next action or date.

You're ready when: The next person reading the record knows whether to continue, move forward, or stop.

A plan is easier to follow when it's in front of you. **Topsail ONE gives you a focused daily queue and the next step**. You make the outreach and have the conversations.

03 Finish with the next block in mind.

Good prospecting makes room on the list. Meetings move into your pipeline. Clear nos come off. Now someone needs to fill those spaces, or next week starts with less work ready to go.

WORKED EXAMPLE

Karl's example: 30 becomes 20

Karl aims for at least 30 calls a week. His example starts with 30 people, contacted weekly. After the yeses and nos, 20 remain.

30	20	+10
prospects to start	still being worked	to prepare next

Ten new people need to be ready before the next round. Leave that until the next calling block and you're back where you started: finding people instead of talking to them.

Karl draws on referrals, former clients, and years of talks and training. Thirty is his number. Choose a list size and pace that fit your market.



Watch Karl work through the 30-to-20 example ↗

Hear how the yeses and nos change his list, and why adding ten people is part of finishing the job.

From Topsail's interview with Karl Schaphorst

34 seconds · Opens on YouTube at 16:19; watch to 16:53.

Get the next round ready

- Subtract people still active from your chosen list size. That's how many need preparing.
- Name who will prepare them and book that work before the next prospecting block.

You're ready when: Your refill count, owner, and preparation time are written down.

04 Fix what keeps taking the hour away.

Lisa has seen active deals push prospecting aside. The cost shows up later, when new conversations dry up. Put your calendar next to your pipeline, she suggests, and ask what would free up time:

> ## “How can I enable you in more ways?”
>
> **Lisa Schnare**
> Managing Partner, ValueSelling Associates

As a manager, Lisa asked to skip meetings where she wasn’t presenting and get the update afterwards. A specific request for time back.

Book prospecting and preparation separately. If a deal needs your prospecting slot, move the block to a named replacement time.

Watch Lisa turn recurring problems into a request for help ↗

Bad data keeps costing the seller time. Lisa explains what a manager can do about it. Listen for the help you could ask for.

From Topsail’s interview with Lisa Schnare
1 minute · Opens on YouTube at 41:08; watch to 42:08.

Protect the next block

- Name one recurring obstacle and a specific fix or request for help.
- Write the owner and deadline. Put the protected prospecting time on your calendar.

You’re ready when: A fix is assigned and your prospecting slot is booked.

Ready for the next block?

Give the next hour a quick check. Any empty box tells you what still needs attention.

Before you start
☐ My first contact, reason, and contact details are ready.
☐ Each outreach outcome has a next move or stop rule.
☐ The refill count, owner, and preparation time are set.
☐ A recurring obstacle has a fix, and prospecting has a time slot.

Download the worksheet ↓

One-page, fillable PDF · No email required

If managing the data, tools, and daily work has become a second job, **take a look at Topsail ONE**. We prepare the contacts and organize the next steps. You get on with the conversations.

THE CONVERSATIONS BEHIND THE GUIDE

Keep listening with Tailwind.

Tailwind brings the conversations and expertise. Field Guides turn those insights into practical resources you can use.

Karl Schaphorst

Make the Prospecting Block Easier to Start

Lisa Schnare

Build an SDR Team People Can Grow Through