THE SECTOR FIELD GUIDES / OCTOBER 2026

ITSM & ITOM lead generation

Start with a workflow. Earn a useful conversation.

A detailed operating playbook for building a relevant account list, earning an informed conversation, qualifying the next step and testing the commercial model.

24	05	08
Detailed chapters	Explained templates	Workbook sheets

Australian contact-rule examples. AUD financial scenarios.

All worked examples are fictional. Methods, cadences and scoring models are operating proposals, not measured sector benchmarks or guaranteed results. No named clients, vendors or example companies are included.

Use the matching eight-sheet workbook alongside this guide. Keep qualification evidence, unknowns, decision owners and approved next actions visible.

Contents

Read from the start for a new campaign. For a live campaign, start where the process is breaking.

01 / CHOOSE THE RIGHT MARKET

01 Sell a useful service-management decision, not a generic transformation call

02 Choose a narrow service problem before choosing a list

03 Use changes as reasons to investigate, not proof of pain

04 Map the workflow owner and the approval path separately

05 Build an account record that distinguishes evidence from assumptions

06 Qualify the campaign before a consultant joins the call

02 / EARN THE CONVERSATION

07 Offer a small decision aid that does not require privileged access

08 Show relevant proof without borrowing a vendor's authority

09 Write the first message around one workflow

10 Adapt the message to data, renewal and partner-led work

11 Choose the contact route before writing a follow-up sequence

12 Handle objections by clarifying the decision, not forcing a meeting

03 / QUALIFY THE NEXT STEP

13 Agree what makes an accepted discovery meeting

14 Run a 25-minute discovery call that ends with a decision

15 Diagnose the workflow before recommending a platform change

16 Make ITOM and CMDB discovery specific enough to be credible

17 Treat cross-team workflows and AI as controlled changes

18 Use a complete meeting brief, with unknowns left visible

04 / MAKE THE ECONOMICS WORK

19 Build the business case without calling released time cash savings

20 Judge acquisition on contribution and consultant time

21 Protect permission, data and sender reputation before launch

22 Set capacity limits before offering free workshops

23 Run a 30-day learning cycle with a longer sales view

24 Put the campaign and discovery brief to work

FIELD GUIDE / 01

Sell a useful service-management decision, not a generic transformation call

IT service management is the practice of designing, delivering, operating and improving IT services. Start with the workflow and its owner, rather than assuming that the buyer needs a different platform.

That creates a practical sales challenge. A buyer may need a better process, cleaner data, a platform change or help using the system they already own. The first call must find which one.

This guide is for ITSM, ITOM and ITAM consultancies, implementation partners, service workflow specialists and automation firms. It covers new implementations, post-launch improvement, integrations and service workflows beyond IT. It is not a guide to selling general outsourced IT support.

The first useful outcome

Find one organisation with a relevant change. Identify one workflow and its owner. Offer a small decision aid. Book a discovery call only when both sides understand its purpose.

Do not demand a funded implementation before a buyer can explore the problem. Do not label an exploratory discussion a funded opportunity either.

Start in one hour. Pick one service and buyer group. Write your minimum meeting criteria. Review five accounts. Record a fact and an unanswered question for each. Draft one small first offer. Assign a reply owner.

Before contact: check the Australian rules in section 21 or the rules that apply in the buyer's country. A public work address does not by itself give permission to send commercial email. The scripts are for an approved contact route, not a workaround for consent.

WORKING NOTES

Evidence rule. The campaign methods and examples are original operating proposals. They are not sector conversion benchmarks. Fictional records are labelled. Source links support external facts, not promised sales results.

FIELD GUIDE / 02

Choose a narrow service problem before choosing a list

“Digital transformation” covers too much. Your first campaign needs a problem a buyer can recognise and a result your delivery team can support.

Campaign lane	Problem to test	First useful buyer	Useful next decision
Post-launch ITSM improvement	A live platform is not supporting an important process well	Service delivery or platform owner	Improve the workflow or investigate another cause
ITOM and discovery	Asset or configuration data is incomplete, stale or hard to trust	IT operations or configuration owner	Assess data sources, scope and access
IT asset management	Ownership, lifecycle or licence records are fragmented	Asset manager or IT finance lead	Define the control gap and evidence needed
Platform selection or renewal	The current model may not fit future needs	IT leader and procurement	Compare optimisation, renewal and replacement
Enterprise service workflows	HR, finance or facilities requests cross unclear handoffs	Business workflow owner	Map one service before choosing tools
Integration and automation	Staff re-enter data or manage repeat handoffs	Process owner and system owner	Check whether a stable workflow can be simplified

Treat each lane as a different campaign. Keep the buying question, offer and proof aligned.

Set your capability boundary

Specify the platforms, releases, workflow types and delivery locations your team can support. Separate advisory work from implementation, managed support and software resale.

A team can be strong on one platform without being the right partner for every platform. Describe actual experience. Do not imply certification, vendor status or specialist capacity that you have not verified.

Starting rule: choose the lane where you have the strongest combination of relevant evidence, reachable buyers and available delivery capacity. Do not pick the largest market merely because the

database returns more names.

FIELD GUIDE / 03

Use changes as reasons to investigate, not proof of pain

A hiring ad, renewal date or merger announcement can make a question timely. None proves that a buyer wants an outside consultant.

Observed change	Source to check	Question it supports
A new service-management role	Current job advert and organisation page	“Which service outcome will this role own?”
A platform programme is announced	Official project statement	“Is the next need implementation, adoption or optimisation?”
An acquisition or restructure	Official company announcement	“Are service processes being combined?”
A business system is changing	Confirmed programme information	“Which request workflows cross this change?”
A procurement notice is published	Approved tender portal	“What is the permitted route to respond?”
A buyer confirms a renewal window	Direct conversation or authorised record	“When must the options review be complete?”
A service owner shares a process issue	Their public post or direct statement	“Would mapping that specific handoff help?”

A job advert that lists a platform is evidence of a requested skill. It may describe a future state, a customer environment or several systems. It does not prove the organisation's installed base.

Write the observation precisely

Use three fields: observed, possible relevance, unknown.

Example: “The organisation is hiring a service catalogue lead. This may make request design relevant. Current tooling, project status and buying route are unknown.”

Do not write: “They have a broken catalogue and need implementation help.”

Assign a review date to each signal. Remove expired tenders and filled roles from active trigger campaigns. A fresh website crawl is not the same as a fresh business event.

FIELD GUIDE / 04

Map the workflow owner and the approval path separately

The person who feels the problem may not own the platform, approve access or fund the work. Make those roles visible without turning the first call into a committee interview.

Role	Their likely concern to verify	Evidence or question that helps
Service delivery leader	Service quality, backlog and consistent handling	One workflow baseline and unresolved exceptions
Platform owner	Maintainability, configuration and release impact	Scope, dependencies and change-control approach
IT operations or configuration owner	Coverage, data trust and operational risk	Data-source and ownership map
Business process owner	Waiting, repeat work and user experience	A plain-language service journey
Security and privacy lead	Access, data movement and supplier risk	Minimum-access plan and data-handling facts
Finance or procurement	Cost, contract route and measurable value	Options, full costs and decision dates
Executive sponsor	Business priority and delivery risk	A short decision brief, not a feature catalogue

These are working hypotheses about roles. Ask how the specific organisation makes decisions.

Do not confuse influence with authority

A platform administrator can be a valuable technical contact. They may not own the business problem or consultancy budget. A senior executive may approve spend while knowing little about the workflow.

Capture who owns the result, who validates technical fit and who authorises the next phase. One person may fill several roles.

Start with the person closest to the chosen problem. Ask for a transparent introduction when another role is needed. Do not contact six colleagues with the same pitch or imply that one has endorsed you.

Meeting rule: an owner or credible route to the owner is more useful than a senior title with no connection to the service.

FIELD GUIDE / 05

Build an account record that distinguishes evidence from assumptions

Begin with suitable organisations. Then research a limited number of relevant people. Contact data is the last part of the research, not the whole job.

A repeatable research pass

Confirm the organisation's services, geography and operating scale from its own pages. Find one change relevant to your chosen lane. Identify the workflow owner or closest role. Check whether the contact route is permitted. Record the source and date. Stop when you have enough context to ask an honest question.

Do not spend an hour building a dossier for a message that only needs one useful fact. Research sensitive internal systems only through authorised discovery.

Field	What a useful record contains
Account and buying unit	The actual entity or division in scope
Campaign lane	One defined service-management problem
Public observation	What the source actually says

Field	What a useful record contains
Source and date	Link, event date and date checked
Platform evidence	Confirmed, suggested by a source, or unknown
Workflow owner	Name or role, with confidence stated
Contact route	Consent, permitted introduction, tender or other approved route
Reason to speak	A question connected to the observation
Next action	One owner and review date

Review duplicates at the organisation and buying-unit level. Do not count three contacts as three independent market opportunities.

Protect the research boundary

Do not run scans, attempt logins or inspect non-public systems to create a sales hook. Do not infer a security defect from a marketing screenshot. A useful public observation is enough.

If the record has no verified reason to speak, move it to a research queue. Do not fill the gap with a claim about “inefficient legacy systems.”

FIELD GUIDE / 06

Qualify the campaign before a consultant joins the call

Use hard exclusions first. Then assess the value of the conversation. Do not let a high score override a failed capability or contact-permission check.

Hard exclusions

Decline work on a platform you cannot support. Pause when access terms are not acceptable or the work conflicts with a current commitment. Do not approach buyers outside their permitted tender route.

A buyer asking for a free production audit is not a qualified consulting opportunity merely because the company is large.

Use a simple priority score

Score each dimension 0, 1 or 2. Use 0 for no evidence, 1 for partial evidence and 2 for clear evidence.

Dimension	Evidence to look for
Service fit	The need matches a defined service you deliver
Problem clarity	A specific workflow or decision is named
Ownership	An accountable owner is identified
Timing	There is a real review point or reason to act
Commercial path	There is a plausible way to approve the next phase

The total is a sorting aid, not a close probability. For an initial test, investigate 0–3, nurture 4–6 and prioritise 7–10. These bands are proposed defaults. Replace them with evidence from your own accepted meetings and wins.

Keep two records

Use research priority to decide where to spend outreach time. Use meeting acceptance to decide whether the booked conversation meets the written standard in section 13.

An account can rank highly yet lack permission to contact. A modest account can be ready for a valuable discovery call. Neither a score nor a company size band substitutes for judgement.

FIELD GUIDE / 07

Offer a small decision aid that does not require privileged access

A strong first offer helps the buyer decide what to examine next. It does not promise to solve a complex implementation during a free call.

Offer A: One-workflow friction map

For: a service owner with a repeat request or handoff problem. Inputs: a verbal walkthrough, roles and rough volume ranges. Output: a one-page map of steps, waits, repeat work and open questions. Boundary: no production access, configuration changes or savings guarantee.

Ask: “Would a short map of that workflow help you decide what to fix first?”

Offer B: Configuration-data readiness review

For: an operations owner considering discovery or CMDB improvement. Inputs: approved high-level information about data sources, ownership and intended use. Output: a checklist of scope, access, data-quality and ownership decisions. Boundary: no scanning, credential collection or claim that the estate has been assessed.

Offer C: Renewal options worksheet

For: a buyer who has confirmed a contract or platform review. Inputs: decision dates, required outcomes and current constraints. Output: a comparison structure for keep-and-improve, extend, replace or defer. Boundary: not a software quote, licence audit or promise to reduce cost.

Do not run all three offers in one message. Match one offer to one campaign lane.

Control the free-work budget

Decide how much preparation the offer includes. If the next step needs interviews, exports, architecture review or detailed testing, scope a paid assessment. Make the transition clear before doing the work.

The free output must still be useful when the buyer does not hire you. That is what separates a decision aid from a pitch disguised as an audit.

FIELD GUIDE / 08

Show relevant proof without borrowing a vendor's authority

A platform logo is not evidence that your team can solve a buyer's workflow problem. A technical certificate is not evidence of a commercial result.

Build a proof library with a small set of records that sales can use accurately.

Proof type	What to include	What not to imply
Delivered project	Scope, starting state, your role, timeframe and approved outcome	That every result was caused by your work
Workflow example	Clearly labelled sample and the decision it illustrates	That the example is a customer result
Platform capability	Current skills, verified status and supported scope	Unverified partnership or certification
Delivery method	Access controls, change process and acceptance criteria	That a checklist removes all delivery risk
Customer reference	Permission, relevant context and agreed use	Unlimited permission to share names or data

If you lack a close sector case, show the method and name its limit. “Here is how we would structure the assessment” is honest. “We have solved this exact problem” is not, unless you have.

Make the proof useful to the buyer

A service owner needs to see the workflow change. A platform owner needs to see how the change was controlled. Finance needs to understand the cost and value basis.

For numerical results, preserve the denominator and time window. A fall in ticket count could reflect fewer users or a changed reporting rule. An improvement after a project does not alone establish causation.

Create a short proof note rather than a large deck: problem, scope, work, result, caveat and relevance. Have the delivery owner approve it before it enters a sequence.

FIELD GUIDE / 09

Write the first message around one workflow

Use these templates only where the commercial contact is lawful and the channel is approved. For Australian email, establish a valid consent basis before sending. A message offering a free review can still be commercial.

Replace every bracket with a verified fact or delete the sentence. Add the required sender identity, contact details and unsubscribe method.

Template: Post-launch improvement

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: [workflow] after go-live

Hi [first name],

Your team announced [verified programme or change].

For the next phase, is [specific service workflow] already working as intended, or is that still being reviewed?

We help service teams map the steps, owners and repeat work before they add more configuration.

Would a one-page workflow review outline be useful?

[Name | business | contact details] [Clear unsubscribe or stop-contact instruction]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[workflow] — Name one workflow or capability that you can genuinely investigate or deliver. Narrow scope makes the question answerable.

[first name] — Use the verified recipient’s preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[verified programme or change] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[specific service workflow] — Name one workflow or capability that you can genuinely investigate or deliver. Narrow scope makes the question answerable.

[Name | business | contact details] — Use the real sender and required business identity and contact details. Do not invent an affiliation or conceal the authorising business.

[Clear unsubscribe or stop-contact instruction] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Template: Service catalogue or request design

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: ownership of [request type]

Hi [first name],

I saw your [verified public statement about the service or role].

Who owns the full [request type] journey, from request through approval to completion?

We put that journey on one page so the team can see which waits come from the process and which need a system change.

Is that a useful question for your team, or is another owner closer to it?

[Name | business | contact details] [Clear unsubscribe or stop-contact instruction]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[request type] — Name one workflow or capability that you can genuinely investigate or deliver. Narrow scope makes the question answerable.

[first name] — Use the verified recipient’s preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[verified public statement about the service or role] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[Name | business | contact details] — Use the real sender and required business identity and contact details. Do not invent an affiliation or conceal the authorising business.

[Clear unsubscribe or stop-contact instruction] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

The second message does not assert that the catalogue is poor. It asks about ownership. Use it only when that question is relevant to the source.

Edit test: can the recipient see why this message relates to their work, what is offered and how to decline? Remove phrases such as “unlock seamless transformation” that answer none of those questions.

FIELD GUIDE / 10

Adapt the message to data, renewal and partner-led work

Different buyers need different reasons to respond. Do not change only the job title in the same email.

Template: Discovery and configuration data

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: [service] data ownership

Hi [first name],

You mentioned [verified operations or service change].

Before adding more discovery coverage, has the team agreed which data the [named service] needs and who will keep it reliable?

We have a short readiness worksheet covering sources, scope, ownership and access. It does not require credentials or a scan.

Would that help with the review?

[Sender details and unsubscribe]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[service] — Name one workflow or capability that you can genuinely investigate or deliver. Narrow scope makes the question answerable.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[verified operations or service change] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[named service] — Name one workflow or capability that you can genuinely investigate or deliver. Narrow scope makes the question answerable.

[Sender details and unsubscribe] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Template: Confirmed renewal or platform review

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: options for [confirmed review]

Hi [first name],

You said the [platform or service] review is due before [date].

A useful first comparison may be improving the current setup versus replacing it, including migration effort and ongoing support.

We use a one-page options worksheet to keep that decision separate from a product demo.

Would you like the blank version for your review?

[Sender details and unsubscribe]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[confirmed review] — Use a verified, buyer-relevant detail that explains the reason for contact. Remove the line if it cannot be substantiated or adds no relevant evidence.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[platform or service] — Name one workflow or capability that you can genuinely investigate or deliver. Narrow scope makes the question answerable.

[date] — Use a confirmed period, and distinguish decision, announcement and delivery dates. Do not manufacture urgency.

[Sender details and unsubscribe] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Template: Complementary delivery partner

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: [workflow] project handoffs

Hi [first name],

Your team works on [verified, relevant service].

We support [specific capability] when a project needs that scope. We do not need to own the wider client relationship.

Would it be useful to compare the situations you handle in-house with those you prefer to refer or deliver jointly?

[Sender details and unsubscribe]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[workflow] — Name one workflow or capability that you can genuinely investigate or deliver. Narrow scope makes the question answerable.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[verified, relevant service] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[specific capability] — Use a verified, buyer-relevant detail that explains the reason for contact. Remove the line if it cannot be substantiated or adds no relevant evidence.

[Sender details and unsubscribe] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Do not state a renewal date scraped from an unverified database as fact. Do not imply the partner has referred a customer until that introduction is real.

Send the promised worksheet before asking for a call. The next ask can then refer to a specific decision the worksheet reveals.

FIELD GUIDE / 11

Choose the contact route before writing a follow-up sequence

Start with permitted warm routes where they exist. These may include current customers and approved introductions. Check the scope of event opt-ins and the rules for tender responses. Respect the terms of each route.

In Australia, do not send an unsolicited commercial email merely to ask for consent to send more. Consent, identification and unsubscribe requirements apply to commercial electronic messages.

A restrained test cadence

The following is a proposed rhythm for contacts already eligible for that channel. It is not a legal permission model or a claim about optimal timing.

Business day	Action	New value
1	Send a relevant first message	One question and a useful worksheet
5	Follow up if no reply	One practical distinction, such as workflow versus tool
10	Offer the promised asset or a brief review	A defined output and clear effort
15	Close the sequence	A simple way to stop or defer

Do not use all four touches when two are enough. Stop the sequence on any reply and route it to a person. Stop on opt-out. Do not move to a new channel to bypass a refusal.

Phone opener

“Hello [name], this is [name] from [business]. I am calling about [specific relevant service topic]. Is now a reasonable time for a short question?”

Explain the question directly. Do not pretend it is a support call or a vendor-required review.

Australian telemarketing standards cover matters such as calling times and identification. Check the applicable rules even when a number is not on the Do Not Call Register.

Coordinate at account level. One owner should know which colleagues have been contacted and why.

FIELD GUIDE / 12

Handle objections by clarifying the decision, not forcing a meeting

A reply is useful information. Classify it before proposing a call.

Reply	Helpful response	Next action
“We already have a partner.”	“Understood. Is there a specific scope they do not cover, or is the current arrangement working well?”	Respect the answer; do not manufacture dissatisfaction
“We are not changing platforms.”	“This does not need to be a replacement project. Is there a workflow worth improving in the current setup?”	Continue only if that problem is real
“Send information.”	“Here is the worksheet. The part most relevant to your note is [section].”	Deliver first; ask one useful question
“No budget.”	“Is this an unfunded problem being explored, or not a current priority?”	Separate research from funded work
“We need a price.”	“Which workflow, systems and deliverable should the price cover?”	Give genuine price boundaries only when supported
“Not this quarter.”	“When does the team next review it, and may we reconnect then?”	Record permission and an actual date
“We need a free audit.”	“The free review maps the issue. A detailed technical assessment has a separate agreed scope.”	Protect access and effort boundaries

Do not use looping questions after a clear refusal. A buyer is allowed to decide that no change is needed.

Move a relevant reply to a useful call

Confirm the workflow, owner and output. Offer two available times in the buyer's time zone, with a booking link as an alternative. Send an invitation only after agreement.

Example: “A 25-minute review could map the joiner request and identify the next evidence needed. Would [time A] or [time B] work for you and the process owner?”

The call earns its place because it makes a decision easier, not because the prospect replied once.

FIELD GUIDE / 13

Agree what makes an accepted discovery meeting

Use the companion workbook to record your campaign boundaries, evidence, qualification decisions and next actions before increasing activity.

Minimum gates for a first discovery call

Gate	Evidence needed	Treatment when unknown
Service fit	The stated need falls within the agreed service scope	Clarify before acceptance
Relevant owner	Attendee owns, influences or can route the chosen workflow	Ask how they are involved
Named topic	A workflow, data problem or platform decision is identified	Do not accept “general catch-up” by default
Genuine interest	The person agrees to discuss that topic	A download or email open is not enough
Clear next-step purpose	The expected output and effort are understood	Fix the invitation
Valid contact route	Required consent and contact checks are recorded	Hold and review

Gate	Evidence needed	Treatment when unknown
No exclusion	No unresolved conflict, capability or procurement barrier	Decline or escalate

A budget figure can be unknown at this stage when the campaign explicitly accepts exploratory discovery. Record that fact. Do not describe the meeting as budget-qualified.

Acceptance rule

Accept when all agreed mandatory gates pass and the meeting has taken place. Hold when material evidence is missing. Decline when a hard condition fails.

A future booking can be provisionally suitable. It cannot yet be an accepted held meeting. Keep status fields separate in the CRM.

Capture the reason for every hold or decline. Review disagreements with the sales owner rather than changing the standard after seeing campaign performance.

Quality target: no accepted meeting should require the consultant to invent why the person is there.

FIELD GUIDE / 14

Run a 25-minute discovery call that ends with a decision

This is a proposed agenda. Adjust the time to the complexity. Do not turn the first call into a full unpaid requirements workshop.

Minutes 0–3: agree the question

“By the end, we should know whether [workflow] needs a deeper review, what information that review needs and who should be involved. Does that match your aim?”

Confirm the attendee's role and the reason the topic matters now.

Minutes 3–10: walk one real request

Ask the buyer to describe a recent, non-sensitive example. Where did the request start? Who approved it? Which systems and teams touched it? Where did it wait? What was repeated?

Do not ask for a raw ticket, personal data or production screenshot in the first call. A verbal, redacted description is enough to locate the next question.

Minutes 10–17: test the cause and size

Ask whether the issue is frequent or an exception. Separate waiting time from active work. Find the current baseline, even if it is only a rough estimate that needs checking.

“What would need to change for this to be worth funding?” is more useful than assuming a licence saving or headcount reduction.

Minutes 17–22: compare next steps

Options may include no action, a process change, configuration work, a scoped assessment or a platform review. Explain why the smallest useful option comes first.

Minutes 22–25: agree the decision

Record the output, owner, evidence needed, date and approval route. Book another meeting only when it has a defined purpose and the buyer agrees.

Send a short recap. Label what the buyer confirmed, what you inferred and what remains unknown. A neat summary must not turn a rough estimate into a measured baseline.

FIELD GUIDE / 15

Diagnose the workflow before recommending a platform change

A new tool can preserve the same unclear approvals and poor ownership. Examine the work first.

Use this sequence: question the requirement, remove unnecessary work, simplify the remaining steps, reduce waits, then automate stable parts. Keep legal, security and customer requirements that have a real basis.

Question	What it can reveal	Possible action
Why does this approval exist?	A control, habit or duplicate check	Preserve, redesign or remove it with the owner

Question	What it can reveal	Possible action
Who uses this field?	Useful data or unused collection	Remove unused fields after checking dependencies
Why is the request reassigned?	Wrong routing or unclear ownership	Fix categorisation and responsibility
Why is information copied?	Integration gap or unnecessary duplication	Simplify first; integrate when justified
Why does work wait here?	Capacity, missing information or approval timing	Change the constrained step
Which cases fail automation?	Unstable rules or unmanaged exceptions	Define exception handling before expansion

Do not delete controls just to make a process faster. Ask the accountable owner what risk the control addresses and how that risk will be managed.

Compare real options

Keep and improve: useful when the platform can support the required workflow and the main issue is process or configuration.

Extend: useful when an integration or focused capability closes a clear gap.

Replace: consider when material needs cannot be met economically within the current environment.

Defer: valid when the expected value does not justify cost, disruption or capacity.

Include migration, testing, training, data cleanup, support and exit costs in the comparison. Do not make a vendor demo the first step in every consulting sale.

FIELD GUIDE / 16

Make ITOM and CMDB discovery specific enough to be credible

“Improve visibility” is not a scope. Ask what decision the data must support.

A configuration management database records configuration items and their relationships. Discovery depends on authorised access, supported sources, approved credentials and defined scope. A specialist must review the actual platform, release, reconciliation rules and ongoing ownership; a prospecting conversation cannot establish technical completeness.

Questions for a readiness conversation

Area	What to establish before deeper work
Business use	Which service, operational decision or control needs better data?
Scope	Which environments, item types and boundaries are included?
Sources	Which approved systems already hold useful data?
Ownership	Who owns each data class and fixes exceptions?
Access	Who may approve credentials, scanning and network access?
Quality	How will coverage, freshness, duplicates and relationships be assessed?
Reconciliation	What happens when sources disagree?
Maintenance	Who will keep the data useful after the project?

Do not promise complete discovery, a perfect CMDB or automatic reconciliation from a first call. Do not define success only as “more records.” More duplicates can make the database worse.

A better first deliverable

Produce a readiness note with the intended use, current sources, unknowns, access decisions and a proposed assessment boundary. Have the technical owner review it.

Keep IT asset management questions distinct where needed. Finding infrastructure does not settle who owns an asset. It also does not settle licence terms or lifecycle decisions.

Sales boundary: the setter gathers the business context. A qualified specialist confirms technical feasibility. Do not let a script create implementation commitments.

FIELD GUIDE / 17

Treat cross-team workflows and AI as controlled changes

Enterprise service management applies service-management practices to other business functions. Map request ownership, access, approvals and handoffs before proposing a cross-department workflow. A platform capability is not evidence that a particular buyer needs it.

Start with one service, such as joining the business, requesting equipment or handling a facilities issue. Identify the business owner as well as IT. Map permissions and handoffs before proposing shared records.

Do not turn an AI interest into an AI project

A buyer saying “we should use AI” has not defined a service outcome. Ask which decision or task is in scope, what data is involved and who checks the result.

Potential use	First question	Control to discuss
Drafting knowledge content	Is the source material approved and current?	Human review and publication ownership
Request classification	What happens when the classification is wrong?	Confidence limits, review and correction
Summarising a case	Does the content contain sensitive data?	Approved tools, access and retention rules
Suggesting actions	Could a wrong suggestion change a live service?	Human approval and restricted permissions

NIST's AI Risk Management Framework provides voluntary guidance for managing AI risks. It is not a certification, legal approval or guarantee that an implementation is safe.

Keep the first offer narrow

Offer to map the workflow, identify a candidate task and list risks that need review. Do not promise automated resolution, staff replacement or unrestricted production access.

The buyer should leave with a clearer decision, including the possibility that a simple process change is better than AI.

FIELD GUIDE / 18

Use a complete meeting brief, with unknowns left visible

The following record is fictional. It illustrates a handoff, not a client result.

WORKING NOTES

ACCOUNT Regional professional-services group. Approximately 600 employees and 12 service-desk agents. Figures stated by the contact; not independently verified.

CAMPAIGN LANE Joiner workflow improvement across HR and IT.

CONFIRMED REASON TO SPEAK The contact says a new HR system is being introduced. They want to review how approved joiners reach IT.

ATTENDEE AND ROLE Service delivery manager. Owns IT service performance. HR process owner has not yet confirmed attendance.

BUYER'S WORDS "We want to agree the handoff before the new process goes live." Illustrative wording for this fictional record.

AGREED CALL 25-minute workflow review. Output: current steps, owners, unknowns and a next-step decision. No production access, audit or implementation included.

KNOWN CONTEXT The contact estimates 600 relevant requests per month. The estimate includes several request types and needs validation. Platform and integration details are not confirmed.

COMMERCIAL STATUS Budget and approval route unknown. Exploratory discovery is allowed under this campaign's criteria. Do not mark as funded or implementation-ready.

CONTACT AND FOLLOW-UP Express permission for the discussion is recorded. Consultant owns the recap. Buyer will confirm the HR owner. Next action: agree who validates the request baseline.

The record is useful because it prevents overclaiming. The consultant knows the reason for the call, the missing owner and the evidence still needed.

Add links to the actual source records in a live CRM, with appropriate access controls. Do not paste passwords, personal ticket data or confidential architecture into a general sales note.

FIELD GUIDE / 19

Build the business case without calling released time cash savings

Measure the work before promising a result. Use a small baseline period that covers normal demand and known exceptions. Explain the limits of the sample.

Worked workflow example

All inputs below are fictional planning assumptions:

Input	Example
Relevant requests each month	600
Active work potentially removed per eligible request	5 minutes
Share of requests eligible for the change	60%
Expected adoption of the new route	70%

Expected released capacity = 600 × 5 × 60% × 70% ÷ 60 = 21 hours per month.

This is a scenario, not measured improvement. It is not automatically 21 hours less payroll. Staff may use the time for other work. It is not a headcount reduction.

If an illustrative fully loaded hour costs AUD 75, the capacity value is AUD 1,575 per month. That is an accounting-style value estimate, not cash in the bank.

Keep the financial questions separate

What cash expenditure would actually stop? What additional revenue or avoided cost can be supported? What implementation, support and change costs are needed? When will benefits begin? Who will validate them?

Do not add a notional time value and a cash saving when they represent the same benefit.

The workbook includes the capacity calculation and a separate optional cash case. Use the cash case only with evidence for the cash benefit. A negative or unknown case is useful information.

Define success before delivery

Agree the baseline, measurement method, adoption check, exception rate and review date. Include service quality and control failures as guardrails. A faster request is not a win if it bypasses required approval.

FIELD GUIDE / 20

Judge acquisition on contribution and consultant time

A busy calendar can destroy value when every call consumes specialist time and few calls have a real purpose.

Worked campaign example

All figures are fictional. Use a single, sufficiently mature cohort.

Stage	Example count
Unique reached accounts, one contact per account	120
Accounts giving a relevant positive reply	8
First meetings due to occur	5
First meetings held	4

Stage	Example count
Held meetings accepted against the criteria	3
Projects won	1

Assume total acquisition cost is AUD 3,000, including research, campaign work, tools, reply handling and allocated sales effort.

Cost per accepted held meeting = 3,000 ÷ 3 = AUD 1,000. Customer acquisition cost = 3,000 ÷ 1 = AUD 3,000.

Assume the won project's revenue is AUD 18,000 and its direct delivery cost is AUD 10,800. Contribution before acquisition is AUD 7,200. After acquisition it is AUD 4,200, before other overhead.

Do not treat software licence pass-through as consulting margin. Do not count future support renewals unless the horizon and costs are included.

Set a ceiling, not a spending target

At an assumed 25% accepted-meeting-to-win rate and AUD 7,200 contribution per win, expected contribution is AUD 1,800 per accepted meeting. This is a rough break-even acquisition ceiling on that basis, not a recommended fee. Uncertainty, overhead and required profit need room.

Track presales hours per accepted meeting and per win. If technical workshops grow while accepted opportunities do not, fix scope and qualification before adding more outreach.

FIELD GUIDE / 21

Protect permission, data and sender reputation before launch

This section is operational guidance, not legal advice. Check current local rules and obtain appropriate review for the markets and data involved.

Australian commercial electronic messages

Record a valid consent basis before sending. Identify the business that authorised the message and provide a working unsubscribe route. A free resource can still promote a commercial service. Do not email someone simply to ask for consent. A published address alone is not enough to assume permission.

ACMA's unsubscribe fact sheet states that unsubscribe requests must be actioned within five working days, with the facility remaining functional for at least 30 days after the message. Do not require login, a fee or extra personal information to opt out. Using a third-party sender does not remove the authorising business's responsibilities.

Apply the relevant rules to calls too. Check Do Not Call requirements and the telemarketing industry standards, including times, identification and ending calls.

Keep sales research away from production access

Do not request credentials by email. Do not ask a prospect to upload raw tickets, employee data or internal diagrams to an unapproved tool.

For a scoped assessment, agree the purpose, data fields, access level, storage, retention, deletion and approved subprocessors before collection. Use the minimum information needed. Get the appropriate agreement and authorisation in place.

Sender controls

Check sender authentication and the current requirements of the providers used by your recipients. Requirements vary by recipient mix and volume. Authentication does not establish consent or guarantee inbox placement.

Use accurate identities and approved business domains. Do not rotate domains or accounts to evade blocks. Monitor replies, bounces and complaints. Pause when the cause is unclear. Automate suppression only after testing that it works across the full contact system.

FIELD GUIDE / 22

Set capacity limits before offering free workshops

A consultant who joins every early call can become the campaign's main constraint. Design the handoff so the setter gathers business context and a specialist joins when their skill is needed.

Work	Primary owner	Completion standard
Account research	Researcher or setter	Verified reason, fit and approved contact route
Reply handling	Setter	Question answered and next action recorded
Meeting acceptance	Sales owner	Agreed gates and unknowns reviewed
Initial discovery	Suitable consultant	One workflow and a next-step decision
Technical assessment	Delivery specialist	Written scope, access and acceptance criteria
Proposal	Commercial owner with delivery input	Feasible scope, cost, exclusions and approval path

Work the capacity maths

Suppose six initial reviews need 45 minutes each including notes. That is 4.5 hours. Two technical assessments need four hours each. That is another eight hours.

If only ten suitable consultant hours are available, total demand of 12.5 hours exceeds capacity. These are fictional assumptions. The fix may be fewer assessments, better early qualification, clearer scope or more capacity. It is not automatically another setter.

Reserve time for proposals, current clients, rework and unexpected issues. Calendar availability is not the same as delivery capacity.

Prevent gaming

Do not reward staff only for booked calls. Include accepted held meetings, evidence quality and later opportunity feedback. Do not make setters responsible for a sales outcome they cannot control without accounting for the sales process.

Review one real handoff and one call together each week. Identify one change. Update the written process when the change proves useful.

FIELD GUIDE / 23

Run a 30-day learning cycle with a longer sales view

The first month should establish a usable system and expose weak assumptions. It is not a promise that enterprise consulting deals will close in 30 days.

Days 1–5: define the lane

Choose one service, buyer group and geographic scope. Review capability, proof, economics and available consultant hours. Agree the meeting gates and contact-permission process. Prepare one first offer.

Output: one approved campaign brief, not six campaigns.

Days 6–10: build and rehearse

Research a manageable first account group. As a planning default, start with 20–30 accounts that the team can genuinely review. This is a workload choice, not a statistically sufficient sample.

Test the workflow review with a colleague. Check the booking route, time zones, reminders, suppression and meeting brief.

Output: tested operations and source-backed account records.

Days 11–20: run the permitted pilot

Send through approved routes. Handle replies within a response window the team can staff. Record reasons for interest, refusal and deferral. Review the first meetings with the consultant.

Output: evidence about the segment, message and meeting quality.

Days 21–30: fix the largest leak

If records are weak, fix research. If the message is irrelevant, change the question or segment. If meetings are vague, tighten the gate and output. If proposals stall, inspect ownership, value and approval route.

Change one major variable at a time. Keep a comparable cohort where practical. Small samples can remain inconclusive.

The next review

Follow opportunities through their real decision cycle, often beyond the first monthly report. Choose review dates from buyer milestones, not an assumed industry average. Scale only when fit, delivery capacity and economics remain credible.

FIELD GUIDE / 24

Put the campaign and discovery brief to work

Use the blank templates below with the workbook. Keep sensitive data out of the sales layer.

Campaign brief

WORKING NOTES

Service lane: Specific buyer group and market: Workflow or decision to investigate: Verified change signals: Minimum service and commercial fit: Hard exclusions: Permitted contact routes and evidence: First offer and its effort limit: Proof we may use: Accepted held-meeting criteria: Reply owner and response window: Consultant capacity: Test budget and review date: Primary measure: Stop and scale conditions:

Discovery handoff

WORKING NOTES

Account and buying unit: Source-backed reason for contact: Attendee role and connection to the workflow: Buyer's confirmed problem or decision: Current workflow and systems, with unknowns: Baseline: measured / estimated / unknown: Other owners needed: Budget and approval status: Agreed meeting output: Access and data boundaries: Next action, owner and date: Acceptance status and evidence:

Before the next meeting

Check that the prospect agreed to the topic. Confirm that the consultant can support the scope. Send the agenda and a working reschedule route. Bring the actual evidence. Leave unknowns visible.

The guide, scripts and worksheets are free to use. The separate workbook includes a campaign brief, account register, meeting gate checker, discovery worksheet, acquisition model and workflow value model.

Use the companion workbook to record your campaign boundaries, evidence, qualification decisions and next actions before increasing activity.

Start with one workflow. Earn one useful conversation. Measure what happens next.

References & scope

Official and industry references support factual context, not the proposed methods or fictional calculations. This is a planning framework, not legal, tax, engineering or investment advice. Check current requirements with the responsible specialist before use.

NIST: AI Risk Management Framework

Voluntary risk-management guidance and GenAI profile. Not a product certification or legal safe harbour.

Open the official reference

ACMA: Avoid sending spam

Australian consent, identification and unsubscribe guidance. Check the facts of each proposed contact.

Open the official reference

ACMA: Email and SMS unsubscribe rules

Official one-page fact sheet. Includes unsubscribe timing and ease-of-use requirements.

Open the official reference

Do Not Call Register / ACMA: Industry standards

Australian calling standards apply beyond numbers on the register. Check current permitted times and required disclosures.

Open the official reference