Sales Acceleration Toolkit

Referral Program	Case Study Templates	Discovery Call Framework
Ask system + email scripts	One format · all four verticals	15-min · 10 questions · all personas

Communication Intelligence Platform | Founder-Led | klearcomm.ai

Version 1.0 | Confidential | For Internal Use Only | Vibrantec Inc., Chicago IL

01 — Referral Program

How to turn happy customers into your best salespeople — softly and systematically

KlearComm's best leads will always come from people who already believe in the product. The goal of this program is not to pressure customers — it's to make it effortless for them to connect you with people in their network who have the same problem they had.

The Philosophy

Never ask for a referral. Ask if anyone comes to mind. The difference is enormous. One feels like a sales ask; the other feels like a natural conversation between two people who respect each other. The scripts below are built around this distinction — they open a door without pushing anyone through it.

When To Ask

The Aha Moment	Right after a customer says something like 'this is exactly what we needed' — in a call, over email, or in a check-in. Strike while the enthusiasm is highest.
30-Day Check-In	One month after onboarding, when they've had enough time to feel the impact but the experience is still fresh. Build a standard 30-day check-in into your customer process.
After a Win	When a customer shares a specific result — a deal closed faster, a team conflict resolved, a compliance issue avoided. That story is the referral. Ask if they know anyone who'd benefit from the same outcome.
At Renewal	Natural moment to reflect on value. If the renewal conversation goes well, a referral ask feels like a logical extension — not a sales pitch.
Never	When things are rocky, unresolved, or the customer hasn't fully activated the product yet. Fix the relationship first.

The Ask — Verbal (In a Call)

"Hey, I wanted to ask you something — and please don't feel any pressure here at all. We're at a stage where the best way we grow is through people like you introducing us to others who have the same kind of challenge you had before KlearComm. Is there anyone in your network — a fellow CEO, someone in your industry — who you think would genuinely get value from seeing this? Even just a name I could mention is helpful."

Then stop talking. Let them think. Don't fill the silence.

If they say yes: "That's fantastic — would you be comfortable making a quick intro over email? I can draft something for you if that makes it easier."

If they say not right now: "Totally fine — if anyone ever comes to mind, I'd love to hear it. No rush at all."

The Ask — Email (Soft Version)

Subject: a quick ask — no pressure at all
Hi [First Name],

I wanted to reach out with a quick ask — and I genuinely mean it when I say there's zero pressure here.

We're growing KlearComm primarily through word of mouth right now, and the conversations that have moved fastest have all started with an introduction from someone like you — a founder or leader who's already seen what it does.

If anyone comes to mind — a peer CEO, someone in your industry, a contact who's mentioned communication or team friction as a challenge — I'd love a warm introduction. Even just a name I could mention would mean a lot.

Either way, thank you for being a customer. We're genuinely grateful for the trust.

[Your Name]

The Intro Email — Draft for Customers to Send

When a customer agrees to make an introduction, offer to draft the email for them. Remove all friction. Here's a template they can send with minimal edits:

Subject: someone I think you should meet

Hi [Referral Name],

I wanted to introduce you to [Your Name] at KlearComm — I've been using their platform for [X months] and thought of you immediately when they asked if I knew anyone who might benefit.

The short version: KlearComm takes behavioral science (DISC, MBTI, that kind of thing) and makes it actually useful in daily communication — in email, on calls, and in the field on mobile. It's been genuinely helpful for [brief personal result — e.g. 'reducing friction on my sales team' / 'getting my field reps communicating more consistently'].

I'll let [Your Name] tell you the rest. Worth 15 minutes if communication consistency is something you think about.

[Customer Name]

Incentive Structure

At this stage, the referral program doesn't need a formal financial incentive — most founder-to-founder introductions are made on goodwill and relationship, not commission. However, acknowledging referrals meaningfully builds loyalty. Consider:

A handwritten thank-you note or small gift when a referral converts to a customer.

A month of free service credit for referrals that close — simple, clean, appreciated.

Publicly acknowledging the customer's role in your growth (in a newsletter, LinkedIn post, or direct message) — many founders value recognition over cash.

Never promise a commission structure you can't operationalize. Keep it simple at this stage.

02 — Case Study Templates

One format built for all four verticals — fill in as customers are ready

These templates are designed to produce a one-page case study per customer that can be used in sequences (Touch 3 value-add), on the KlearComm website, in the sales deck, and as leave-behinds after demos. The structure is identical across all four verticals — only the context and language changes.

How to Complete a Case Study

- Step 1: Schedule a 20-minute customer interview — use the questions in this template as your guide.
- Step 2: Draft the case study from their words, not yours. Quote them directly wherever possible.
- Step 3: Send the draft to the customer for approval before publishing or sharing externally.
- Step 4: Get explicit permission to use their name, company, and any metrics mentioned.
- Step 5: Create both a full version (for website / leave-behind) and a 3-sentence summary (for email sequences).

How [Company] Scaled Communication Consistency Across a Growing Field Team

Case Study Template · Manufacturing / CPG

Customer	Industry	Company Size	Primary Use Case
[Company Name]	Manufacturing / CPG	[X employees / X locations]	[Internal / Sales / Both]

🔍 The Situation

[2-3 sentences. Who is this company, what do they do, and what was the communication challenge they were experiencing before KlearComm? Use their words where possible.]

[Example: {Company} is a {size} {industry} company with a team of {X} field-based {role}. As the company scaled past {milestone}, {CEO/Founder name} noticed that communication inconsistency was creating friction — both internally and with {clients/partners/customers}.]

[Pull directly from interview Question 1.]

⚠️ The Problem

[2-3 sentences. What specifically wasn't working? What had they tried before? Why did previous solutions fail?]

[Example: The team had completed DISC assessments, but the data was sitting unused. Training events created temporary awareness that faded within weeks. {Name} needed something that worked in the moment — not in a classroom.]

[Pull from interview Questions 1, 2, 3.]

⚡ Why KlearComm

[1-2 sentences. What specifically attracted them to KlearComm over alternatives? What was the deciding factor?]

[Example: The Advice Ally mobile feature was the deciding factor — {Name} needed something that worked for a team in the field, not at a desk. The ability to use existing DISC data without starting over was also critical.]

[Pull from interview Question 3.]

✅ What Changed

[3-5 sentences or bullet points. Specific, concrete results. Numbers where possible. Quotes where available. Avoid vague language like 'improved communication' — be specific about what changed and how they know.]

[Example results to draw out:
• "New reps are communicating at the level of our top performers within 6 weeks instead of 6 months"
• "We've had zero compliance escalations since deploying the guardrails"
• "Our close rate on second meetings improved — we attribute it to how the team shows up on calls now"]

[Pull from interview Questions 4, 5, 6.]

💬 In Their Words

"[Direct quote from the customer — their most compelling, authentic statement about the impact of KlearComm. This is the most important field in the case study. Get it in the interview and use it verbatim.]"

— [Name], [Title], [Company]

Interview Questions — Use in Customer Call

Schedule 20 minutes. Record with permission. These questions are ordered to build from pain to impact — don't skip ahead.

1. Before KlearComm, how would you describe the communication challenges inside your team?

2. Had you tried DISC, MBTI, or any other personality tools before? What happened with those?

3. What made you decide to try KlearComm specifically?

4. What was the first moment you felt like it was working?

5. Which feature has had the biggest impact for your team — and why?

6. If you had to put a number on it, what has changed? (ramp time, deals, friction, etc.)

7. What would you tell another CEO in manufacturing who was considering KlearComm?

How [Brokerage] Cut Agent Ramp Time and Improved Client Communication Consistency

Case Study Template · Mortgage & Real Estate

Customer	Industry	Company Size	Primary Use Case
[Company Name]	Mortgage & Real Estate	[X employees / X locations]	[Internal / Sales / Both]

🔍 The Situation

[2-3 sentences. Who is this company, what do they do, and what was the communication challenge they were experiencing before KlearComm? Use their words where possible.]

[Example: {Company} is a {size} {industry} company with a team of {X} field-based {role}. As the company scaled past {milestone}, {CEO/Founder name} noticed that communication inconsistency was creating friction — both internally and with {clients/partners/customers}.]

[Pull directly from interview Question 1.]

⚠️ The Problem

[2-3 sentences. What specifically wasn't working? What had they tried before? Why did previous solutions fail?]

[Example: The team had completed DISC assessments, but the data was sitting unused. Training events created temporary awareness that faded within weeks. {Name} needed something that worked in the moment — not in a classroom.]

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— [Name], [Title], [Company]

Interview Questions — Use in Customer Call

Schedule 20 minutes. Record with permission. These questions are ordered to build from pain to impact — don't skip ahead.

8. What was the agent communication problem you were trying to solve before KlearComm?

9. How were your coaches supporting agents before — and where were the gaps?

10. Was compliance a concern? How has that changed?

11. How quickly did agents start using the mobile Advisor feature in the field?

12. What's the most concrete result you've seen — a specific agent, a specific deal, a specific moment?

13. How has it changed how your coaches work with agents?

14. What would you say to another broker/owner who was evaluating KlearComm?

How [Company] Built a Communication SOP Across [X] Locations

Case Study Template · Consumer Services — Franchise

Customer	Industry	Company Size	Primary Use Case
[Company Name]	Consumer Services — Franchise	[X employees / X locations]	[Internal / Sales / Both]

🔍 The Situation

[2-3 sentences. Who is this company, what do they do, and what was the communication challenge they were experiencing before KlearComm? Use their words where possible.]

[Example: {Company} is a {size} {industry} company with a team of {X} field-based {role}. As the company scaled past {milestone}, {CEO/Founder name} noticed that communication inconsistency was creating friction — both internally and with {clients/partners/customers}.]

[Pull directly from interview Question 1.]

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[2-3 sentences. What specifically wasn't working? What had they tried before? Why did previous solutions fail?]

[Example: The team had completed DISC assessments, but the data was sitting unused. Training events created temporary awareness that faded within weeks. {Name} needed something that worked in the moment — not in a classroom.]

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[3-5 sentences or bullet points. Specific, concrete results. Numbers where possible. Quotes where available. Avoid vague language like 'improved communication' — be specific about what changed and how they know.]

[Example results to draw out:
- "New reps are communicating at the level of our top performers within 6 weeks instead of 6 months"
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— [Name], [Title], [Company]

Interview Questions — Use in Customer Call

Schedule 20 minutes. Record with permission. These questions are ordered to build from pain to impact — don't skip ahead.

15. What communication problem were you trying to solve at scale?

16. What had you tried before that didn't work?

17. How did you approach the rollout — did you pilot first?

18. How did frontline employees respond to the mobile tool?

19. Have you seen any measurable change in customer feedback or complaints?

20. How has the compliance feature changed how you manage employee-customer interactions?

21. What would you tell another franchise operator about KlearComm?

How [Agency] Finally Activated Their Personality Data — And What Changed

Case Study Template · Insurance

Customer	Industry	Company Size	Primary Use Case
[Company Name]	Insurance	[X employees / X locations]	[Internal / Sales / Both]

🔍 The Situation

[2-3 sentences. Who is this company, what do they do, and what was the communication challenge they were experiencing before KlearComm? Use their words where possible.]

[Example: {Company} is a {size} {industry} company with a team of {X} field-based {role}. As the company scaled past {milestone}, {CEO/Founder name} noticed that communication inconsistency was creating friction — both internally and with {clients/partners/customers}.]

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— [Name], [Title], [Company]

Interview Questions — Use in Customer Call

Schedule 20 minutes. Record with permission. These questions are ordered to build from pain to impact — don't skip ahead.

22. You had invested in personality tools before KlearComm. What was missing?

23. What does 'activating' the data actually mean for your team day to day?

24. Which communication challenge has improved most — internal team, client relationships, or prospecting?

25. Are you using or considering the client-facing value-add model? What's your thinking there?

26. What specific client interaction or team moment stands out as proof that it's working?

27. How has it changed how your producers communicate with prospects?

28. What would you say to another broker who's skeptical that this is just another DISC tool?

03 — Discovery Call Framework

15 minutes · 10 questions · structured to uncover pain and earn the demo

This framework is designed for a 15-minute first call — enough time to qualify the prospect, identify their primary pain point, and create genuine interest in seeing the product. The goal is not to demo on this call. The goal is to earn the demo.

The Golden Rule of Discovery

You should be talking for no more than 30% of this call. The prospect should talk for 70%. Your job is to ask the right question, then listen without interrupting. The moment you start pitching features, you've lost the discovery.

Call Structure at a Glance

Time	Phase	What's Happening
0:00 – 1:00	Opening	Set the agenda. Make them comfortable. Confirm time.
1:00 – 4:00	Context Questions	Understand their world (Q1–Q3)
4:00 – 9:00	Pain Questions	Go deep on the problem (Q4–Q7)
9:00 – 12:00	Impact Questions	Quantify the cost and the stakes (Q8–Q9)
12:00 – 14:00	Bridge	Tee up KlearComm — one sentence, then listen (Q10)
14:00 – 15:00	Close	Confirm next step. Book the demo before you hang up.

Opening Script

"Thanks for making time — I'll keep us to 15 minutes, I promise. Here's what I'd like to do: spend the first 10 minutes understanding your situation and what's going on with your team, and then if it makes sense, I'll spend 2 minutes showing you what we do and we'll see if a deeper conversation is worth your time. Does that work?"

Then ask: "Before I jump into questions — is there anything specific that made you agree to this call today?"

[Listen. Whatever they say here will be the most important thing on the call. It tells you exactly what pain brought them in.]

Q2 Have you invested in any personality or communication tools before — DISC, MBTI, Predictive Index?

Why ask: Establishes whether they're a field-based, multi-location, or office-based team — which determines which KlearComm features matter most.
Follow-ups:
Are they mostly in the field, or centralized?
How many direct reports do you have, and how many total?

Q1 Tell me about your team — how are you structured and how distributed are they?

Why ask: This is the single most important qualifying question. A yes unlocks the 'activate your existing investment' angle immediately and dramatically shortens the sales cycle.

Follow-ups:
- What did you do with the results?
- Is that data still accessible?
- How did your team respond to it?

Q3 How would you describe communication inside your team right now — what's working and what isn't?

Why ask: Open-ended warm-up that lets them name the pain in their own words. Don't guide them — listen for the specific friction points they volunteer.

Follow-ups:
- Can you give me a specific example?
- Is this more of an internal issue, an external one, or both?

Q4 What does it look like when communication breaks down on your team — what actually happens?

Why ask: Moves from abstract to concrete. Forces them to visualize a real example, which makes the pain more visceral and memorable.

Follow-ups:

- How often does that happen?
- Who usually has to step in to fix it?
- What's the downstream impact when it does?

Q5 When you bring on a new person — a rep, an agent, a manager — how long before they're communicating the way your best people do?

Why ask: The ramp time question is universally painful. Every leader has a number in their head. Getting them to say it out loud makes the cost concrete.

Follow-ups:

- What happens in that gap period?
- What have you tried to close it faster?

Q6 Is communication consistency something that's ever created a risk for you — with a client, a compliance situation, or a customer complaint?

Why ask: Creates a vivid mental image of the consistency gap. Most leaders know the answer is 'very different' — and that realization is uncomfortable in a productive way.

Follow-ups:

- What would be different about them?
- Does your average performer know what good looks like?

Q7 If I asked your top performer and your average performer to each send a follow-up email to the same client — how different do you think they'd be?

Why ask: Creates a vivid mental image of the consistency gap. Most leaders know the answer is 'very different' — and that realization is uncomfortable in a productive way.

Follow-ups:
- What would be different about them?
- Does your average performer know what good looks like?

Q8 If you had to estimate — what do you think communication friction is costing you? In time, in deals, in turnover?

Why ask: Quantifying the cost is the most important moment in the call. Don't give them a number — let them arrive at one themselves. Their number will always be more persuasive than yours.

Follow-ups:
- Is it more of a time cost, a revenue cost, or a retention cost?
- If you could get even 10% of that back, what would that mean for the business?

Q9 Is solving this a priority for you right now — or is it more of a 'nice to have' at this stage?

Why ask: The priority question separates qualified prospects from interested ones. Someone who says 'nice to have' needs a longer nurture. Someone who says 'it's a real problem' is ready for a demo.

Follow-ups:
- What would need to be true for it to become a priority?
- Is there a specific trigger — a hire, a quarter, a target — that's making you look at this now?

Q10 Based on what you've told me — would it be worth 30 minutes to see exactly how KlearComm addresses this?

Why ask: The close question. By this point they've articulated their own pain twice. The demo ask should feel like the natural next step, not a sales pitch.

The Bridge Statement — One Sentence Before Q10

"Based on what you've described — [reflect their exact pain back in one sentence] — that's exactly the problem KlearComm was built to solve. The way it works is [one sentence only — don't demo yet]. Would it be worth 30 minutes to see it in action for a team like yours?"

[Example for a Manufacturing CEO:]

"Based on what you've described — your team has the DISC data but it's not showing up in how they actually communicate with clients day-to-day — that's exactly the gap KlearComm closes. It takes that existing data and surfaces it in real time inside Outlook, Slack, and on their phones in the field. Would it be worth 30 minutes to see what that looks like for a team your size?"

Closing the Call

Before You Hang Up — Always
Confirm the next step before ending the call. Don't say 'I'll send you a calendar link.' Open your calendar and book it live.

"I have [day] at [time] or [day] at [time] — which works better for you?"
Send a calendar invite within 5 minutes of hanging up.
Log the call in HubSpot immediately — notes, pain points surfaced, and deal stage update.

Red Flags to Listen For

"We're pretty good at communication already." — Not disqualifying, but they need a different angle. Pivot to the sales performance or compliance features.
"Send me some information first." — Means they're not ready. Don't argue. Send the one-pager and set a specific follow-up date before you hang up.
"I'd need to loop in [someone else]." — Identify who that person is and get them on the demo call. Don't let this become a black hole.
"We just don't have budget right now." — Probe before accepting. Ask when the next budget cycle is and whether this could be piloted at a small scale first.