



BUILDING YOUR SALES FUNNEL

How to Create an Outbound Prospecting Machine

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EXTRAS:

[CEO's Guide for Hiring an Outbound Prospecting Manager](#)

[Quick Start Guide for the Outbound Prospecting Manager](#)

[Quick Start Guide for Business Development Representatives](#)

FORWARD

WHAT'S THE ONE THING A PROFIT-SEEKING COMPANY MUST HAVE?

You may think “profits” -- but you’d be wrong. Lots of companies exist for a time without profits. You might also think “capable people,” “a quality product,” or “effective systems,” and you’d be wrong again on each count. I have seen lots of experienced and capable people fail, great products that never sold, and effective systems that lingered forever underutilized.

No, the one thing that a company must have is customers! From small to large organizations, from one-person freelancers to multi-national corporations, from manufacturers to service providers, the characteristic that all the best have in common is a growing customer base. When one of my sons was a teenager, he decided to start a lawn mowing business. He came to me with a plan to create business cards, buy a lawn mower, schedule his Saturdays for the work, and so on. I told him to forget all that and go get some customers, and then let everything else evolve from there.

But alas, acquiring customers just isn’t that easy – at least not if you want to do it right. After all, it’s not just about acquiring customers; it’s about acquiring the right kinds of customers at the right cost. It’s also about doing so methodically, regularly and reliably.

That’s where the challenge comes in, and this alone can make or break a company. The best companies, regardless of size, industry or location, have all figured out how to do this part of their business well. Those that never get over this hump are relegated to the relative oblivion of a persistent, mediocre existence.

Now, suppose you could take one piece of this hugely important business challenge -- outbound prospecting -- and figure it all out. Not only that, but you could render the systems, processes and practices into a reproducible format. And then, suppose you could put that wisdom into a document so that any serious business owner or entrepreneur could share it, follow the advice, and succeed at this very difficult, incredibly important business task.

If you could do that, you’d have the document that follows. Be thankful you have it. Consider it carefully. Implement it rigorously. Then enjoy your success as your business nets a continuous stream of new customers!



DAVE KAHLE

President, [The DaCo Corporation](#)

Author of nine books, including [How to Sell Anything to Anyone Anytime](#) (Career Press, 2010) and the [Kahle Way B2B Sales Blog](#).



INTRODUCTION TO OUTBOUND LEAD QUALIFICATION

Outbound lead qualification is an essential component of an effective overall marketing strategy for B2B companies and certain B2C companies. Also referred to as outbound prospecting, outbound lead qualification helps you:

- Generate highly qualified prospects in critical target segments that other marketing channels may or may not be able to influence
- Reduce your cost of acquiring customers
- Better define your target customer segments
- Better define the qualification criteria you use to determine which prospects to put sales time against
- Better understand your targets' needs (pain points), buyer roles, and buying processes
- Better understand the personas for each of the buyer roles
- Discover how to best adjust your sales process to align with your buyer roles and buying processes, thereby minimizing the sales cycle and sales time

QUICK EXAMPLE: *INTRONIS, INC.*

PROBLEM

Intronis wanted a better way to prospect and qualify key prospects and convert them into long-term customers. Its time-strapped sales team was focusing primarily on leads generated from inbound sources. Intronis wanted a process-oriented approach to outbound prospecting that was defined, repeatable, scalable, and successful.

SOLUTION

Intronis and OpenView crafted a plan to staff, execute, manage, and measure the new outbound prospecting process and the regular interaction with the Intronis marketing and sales teams.

RESULTS

Sparked by the outbound prospecting process, Intronis' sales to its target market doubled annually within six months and the approach and results continue to scale.

"GENERATING LEADS AND PICKING THE RIGHT TARGETS IS A CHALLENGE FOR ANY COMPANY. IMMEDIATELY WE SAW THAT OUTBOUND WOULD NOT ONLY GENERATE A HIGH NUMBER OF LEADS, BUT ALSO THE RIGHT QUALITY OF LEADS, AND THAT'S WHAT WE WANTED. THE RECONFIRMATION OF OUR TARGET MARKET THROUGH CONVERSATIONS WITH USERS AND BUYERS ADDED TO THE SUCCESS."

SAM GUTMANN
Co-Founder, Intronis



- Discover what types of competitive-advantage messaging and content resonate with buyers so you can improve the materials you produce
- Improve the way your team handles objections

Outbound lead qualification can be used in both direct sales situations, where you sell directly to your end-customers, and indirect sales situations, where you sell through channel partners. In the latter case, you can use outbound prospecting to help sign-up new channel partners, or to find leads to pass on to your partners to help them build their business.

While this practice seems very simple, it is exceptionally difficult to initiate, refine, and improve; most outbound lead qualification attempts either fail completely or never improve to a “best practice” level. So how can you maximize your chances for success?

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OUTBOUND PROSPECTING DEFINED

Outbound lead qualification is a direct marketing channel, whereby you identify your target customers and then directly reach out and introduce them to your company, its products, and its services.

Outbound prospecting for B2B companies in its simplest form is essentially 1) compiling a list of companies and people that you believe are the best target prospects for your company’s products and services, and 2) calling those prospects to introduce them to your company and discover if they are indeed a good fit. Outbound prospecting for B2C companies is similar, although there are more potential people to call.

The output from your prospecting team, in its simplest form, is the hand-off of qualified leads or sales opportunities to your sales team. The leads might be handed-off during scheduled meetings or through your sales automation system. In some instances, an outbound prospector might end up taking the prospect all the way through the buying process to close the sale (particularly with low-priced B2B sales or with B2C sales).

Your prospecting, marketing, and sales teams should join together for retrospective meetings on a regular basis (daily, weekly, monthly, and quarterly) to share what they’ve learned and identify ways to improve.

EXAMPLES INCLUDE:

- Better target lists (e.g., better target companies, target roles, and contact information)
- More training of the prospectors in specific areas
- Better sales content and pitches
- Better prospect qualification criteria
- Better hand-offs to the sales team

Teams that have a disciplined approach to identifying and executing improvements can dramatically boost their performance. Depending on the starting point, this can range from a 2X to 50X improvement in the number of great prospects that are handed off to the sales team as the practice ramps up.

MORE COMPLETE AND/OR SOPHISTICATED OUTBOUND LEAD QUALIFICATION PROGRAMS CAN INCLUDE THE FOLLOWING:

- An email marketing program that enables you to send emails to warm up prospects prior to the first call.
- Website content that your prospector can direct the prospect to during or after the call.
- Events, website content, outside (social media) discussions, and/or newsletters that your prospector can offer to your prospects — content that will provide prospects with ongoing value and improve their understanding of and relationship with your company.
- Periodic follow-up calls from the prospector to further build the relationship and determine how the prospects are progressing in their readiness to purchase.
- For B2B, using the first calls as a springboard to help identify other people in the company who might be additional prospective buyers, or who might be better suited for your company's products.
- You can also use outbound prospecting as part of a coordinated multi-channel marketing program, which is very effective given that it generally takes a few impressions from different angles to warm up a prospect. Outbound prospecting tends to cut through the marketing clutter better than other marketing channels and helps to prime prospects for marketing contacts through other channels. For example, in a B2B situation, emailing and then calling a prospect who will probably be attending an event where you'll be exhibiting has proven to be an effective marketing strategy; while the person is walking the floor, he/she will probably stop by to "meet the people who were nice enough to call."

BUSINESS BENEFITS OF OUTBOUND PROSPECTING

Outbound qualification offers significant value to your marketing efforts by enabling your people to 1) communicate directly with users and buyers, and 2) significantly grow your sales pipeline.

Create more sales and opportunities. The most direct result from outbound qualification is the greater number of qualified prospects you'll give your salespeople, which will ultimately result in more sales. In most instances, these sales opportunities would not be created through other marketing channels. Lower the marketing cost for customer acquisition. For many companies, the marketing cost of a closed sale is higher than the cost of a closed sale through an outbound prospecting program. If this is the case for your company, then you will lower the marketing cost of acquisition as you expand your outbound qualification efforts.

Reduce the sales cycle time and increase conversion rates for your entire business — not just the business created by your outbound program. When the results from outbound qualification are closely tracked and turned into insights, and you use those insights to generate and implement ideas for improvement, you can substantially increase your business overall. Using the insights you gain will enable you to improve in a number of areas.

FOR EXAMPLE:

- Find better and more specific target customer segments and roles where your product is most appealing. Constantly adjusting the target lists based on results will help you increase your conversions and refine your other marketing channel results as well.
- Improve your competitive-advantage messaging and content. Direct conversations with cold prospects will dramatically improve your ability to figure out what messages and content resonate with them and what kind of information will turn them into warm prospects. You can use that information to improve your messaging and content throughout all other marketing channels as well.
- Identify the most frequent buyer objections and figure out ways to overcome them; you can then incorporate those replies into your messaging and content to prevent or mitigate similar objections in the future. Outbound prospecting gives you the best opportunity to identify the reasons why your target prospects may not want to buy a product like yours, or your product in particular. This gives you the opportunity to craft your messages and content in a way that addresses the objections across all of your marketing channels.

"DON'T WASTE TIME WITH LEADS THAT WILL NEVER BUY. QUALIFY NEW PROSPECTS INTO YOUR PIPELINE WHILE AT THE SAME TIME QUALIFYING OTHERS OUT OF YOUR PIPELINE."

COLLEEN FRANCIS
Founder and President
[Engage Selling Solutions](#)



OUTBOUND QUALIFICATION AS A COMPANY-LEVEL STRATEGY

THE KEY INGREDIENTS TO SUCCESSFUL OUTBOUND CALLING

- 1. FOCUS ONLY ON THOSE PROSPECTS THAT FIT YOUR IDEAL CUSTOMER PROFILE (ICP).** Take the time to define what your sweet spot looks like and build a target list of companies that fit those parameters. Don't assume that just because a company is in your database that they fit your ICP!
- 2. EXECUTE A PROCESS THAT INCLUDES (AT MINIMUM) 4 TOUCHES IN 10 BUSINESS DAYS.** Call, call, email, call. Don't fall into the trap of becoming an inside sales rep that communicates primarily via email. Yes, I know people generally respond more to emails, but that's because they can blow you off easier that way. You can't control the sales process if you don't have the ability to ask relevant questions, handle objections and position yourself against the competition. You don't need a pen pal, you need a qualified prospect.
- 3. ALWAYS LEAVE COMPELLING VOICEMAIL MESSAGES OF LESS THAN 90 WORDS.**
- 4. EMAILS SHOULD BE TEXT ONLY, CONTAIN ONLY ONE LINK, AND BE AS SHORT AS POSSIBLE.** This allows your prospects to easily read your emails on a BlackBerry, smartphone or personal digital assistant (PDA). Emails also must contain a call to action and should not include attachments.
- 5. LET THE PROSPECT KNOW WHEN IT IS YOUR FINAL CALL.** Bear in mind that even if a prospect does not respond immediately, it doesn't mean your message was not absorbed. If they fit your ICP, put them through this process again in six months.

TRISH BERTUZZI
President and Chief Strategist
[The Bridge Group, Inc.](#)



A properly executed outbound lead qualification effort adds measurable value, but as with any practice, it takes time and resources to get the practice off the ground, make adjustments, get it running smoothly, and produce the results you want. In addition, it will be essential that your marketing, sales, and product management teams are all involved with the effort; these departments will need to interact with the business development team and help implement ongoing improvements in order to ensure the program's medium- and long-term success.

Given the length of time and cross-functional nature of the practice, the CEO and the rest of the executive team must buy-in to the value of the program, determine the long-term strategic goals and shorter-term goals for the practice, communicate its importance to employees, and dedicate the proper resources to the effort. In addition, participating employees should be given goals and the right measurements to track performance.

YOUR OUTBOUND PROSPECTING STRATEGY AND PRACTICE AT THE EXECUTIVE LEVEL INCLUDES:

- Setting the right long-term goals and shorter-term goals/milestones
- Assigning senior sponsorship
- Appointing a person (an outbound prospecting manager) to be responsible for the effort
- Approving an approach and plan that is right for your situation
- Properly resourcing the effort
- Constantly communicating the importance of the effort to everyone involved
- Reviewing results and making adjustments over time

HOW TO CUSTOMIZE YOUR APPROACH TO OUTBOUND PROSPECTING

An outbound prospecting program should be well constructed, but as with all practices, there are many approaches that can lead to a successful effort.

Below are two broad examples to help you determine the best approach for your business:

Approach 1:

TEST IMPLEMENTATION. Start with a small number of committed people. Hire one individual or deploy a sales resource to work with marketing on a targeted campaign (this should be managed by marketing at this point). Determine the plan for each iteration of the effort after you have a few months of progress and have taken the time to check, reflect, and review results versus your goals. This approach is best used if the senior team is not ready to commit to a full-scale implementation. The downside of this approach is that it will take longer to maximize the impact of the effort and require more ongoing focus of the senior team and new manager to repeat the training and engagement steps with new prospectors over time.

Approach 2:

FULL-SCALE IMPLEMENTATION. Determine who in the organization should be responsible for the success of the program and execute a plan for getting a team hired and set up for success (see the role of the manager on page #). This approach should still be iterative in nature, with ongoing adjustments based on results, but will maximize the short-term impact of the effort and allow most of the focus and implementation effort to be contained in a shorter period of time. The downside of this approach is that it will take more time and commitment up-front on the part of the CEO and executive team to ensure that the implementation is successful.

The approach that you determine is best for your company needs to fit within the context of your specific situation. The key is to get a plan together that you can implement relatively quickly and start measuring the progress against your goals.

OUTBOUND PROSPECTING

ROLES AND METRICS

BALANCING EFFICIENCY WITH EFFECTIVENESS



S. ANTHONY IANNARINO
President And Chief Sales Officer
SOLUTIONS Staffing

Sales managers love metrics, and when it comes to inside sales, they particularly love activity metrics. The general belief is simple: more calls lead to more sales. Sometimes this is true, but activity is not the only metric to consider, and is rarely the right solution for improving sales numbers.

The number of calls being made or taken is a measure of efficiency. It tells us how well we are using our time. But sales is not a game that easily lends itself to efficiency.

On the other end of the telephone is a prospective client who may have a very different timeline than we do, whether it involves having the discussion or buying what we sell. As a result, it's difficult to approach human relationships with the intention of managing them in an efficient way. The other side of this dichotomy is effectiveness. Effectiveness is more important than efficiency when it comes to improving sales results, but it's also much more difficult to measure and track.

Simply put, effectiveness is the measure of how well we succeed as salespeople in achieving the objectives of our sales calls. It's the measure of our ability to engage our prospects in a meaningful way and develop a relationship in which we are trusted to help them make the right decisions. Ultimately, effectiveness is the measure of our ability to understand the prospective clients and their needs.

But these ideas about effectiveness and others like them don't easily lend themselves to counting. So instead, we tend to focus on the things we can count.

BALANCING EFFICIENCY WITH EFFECTIVENESS (CONTINUED)

THREE RULES FOR USING METRICS

- 1.** Activity metrics are worth tracking, even if they aren't perfect. They do offer some insight into how much activity is needed to achieve your objectives. They can also identify salespeople who need help using their time more efficiently. Track the critical activities.
- 2.** You also need to track effectiveness. While the ideas that demonstrate effectiveness are not easily counted, the outcomes and objectives that move a prospect through the sales process are. Did we obtain the commitment for an appointment? Did we secure a commitment to present? Did we acquire the names of others who may be involved with making the decision? Track the outcomes.

You will be surprised to discover that some of your salespeople maintain lower activity numbers while producing better results. You will also find salespeople with very high activity numbers who struggle to make sales. A good sales process can help you outline these outcomes and objectives and tie them back to the activities that generate them.

- 3.** Finally, and perhaps most importantly, you improve both efficiency and effectiveness when you provide your salespeople with the right tools, technology, training, and development to do the job. The technology always seems to come first because it's easy to acquire, but it's only an enabler. The tools include things like a sales process and scripts, which are relatively easy to produce as well. They provide the foundation for effective selling.

But if you seek effectiveness -- and that's where the real gains in sales results are found -- you have to spend time and energy providing the training, development, and coaching that builds it. This is where the real gains are made, and where effectiveness is truly improved -- even if it's hard to quantify.

KEY ROLES OF AN OUTBOUND LEAD QUALIFICATION PROGRAM

There are three primary roles in an outbound qualification practice (this eBook contains several checklists and quick start guide to help each of the people involved to initiate the practice):

- 1.** The CEO and executive team, who set the priority and goals for the effort, allocate the proper resources, and communicate the importance of the effort to the people involved.
- 2.** The outbound prospecting manager, who develops the plan, ensures that the CEO and executive team approve and support the effort, and works with the business development representatives (the prospectors) to execute the plan and meet the goals. In addition, the manager needs to work with representatives from marketing, sales, and product management to help identify the opportunities for improvement and make the necessary adjustments on a daily, weekly, monthly, and quarterly basis.
- 3.** The business development representatives, who help execute the plan, meet individual targets/goals, and give feedback to marketing for better content to support their efforts.

METRICS FOR SETTING GOALS AND REVIEWING PROGRESS

Metrics are extremely helpful for accurately setting measurable goals of the effort as well as helping to track performance and gain insights to improve your prospecting efforts.

THE METRICS FOR PROSPECTING FALL UNDER TWO SIMPLE CATEGORIES:

1. Prospecting activity metrics, which measure the inputs to your prospecting efforts, such as:
 - The number of calls completed on a daily, weekly, monthly basis
 - The number of activities completed on a daily, weekly, monthly basis
 - The number of conversations completed on a daily, weekly, monthly basis
2. Conversion metrics, which measure the number of leads converted to opportunities, such as:
 - The number of qualified leads generated daily/weekly
 - The number of qualified opportunities generated daily/weekly
 - Conversion rates
 - Prospect to qualified lead
 - Qualified lead to opportunity
 - Opportunity to close

CHALLENGES OF OUTBOUND PROSPECTING

Outbound qualification has been incorrectly viewed as a low-level effort focused on generating sales pipeline. In addition, it generally gets improperly classified as an easy to execute initiative when, in fact, it is one of the most difficult programs to initiate and improve.

As organizations create their marketing strategies, segments, and channels, they often struggle with building a solid and continuously improving outbound prospecting practice. Common problems that you will probably encounter include:

- Lack of buy-in and/or commitment from your CEO and senior management team, which will make your employees believe that it is not a priority and that their contributions are not important
- Not hiring a qualified manager, which will prevent you from getting the program off the ground
- Lack of clear and measureable goals, which will make it difficult for you to monitor progress and make adjustments
- Lack of clear communication and focus, which will make it difficult for 1) your management team and employees to get aligned on this initiative, and 2) your business development reps to continue to stay disciplined in making their calls and executing each call effectively
- Inability to get all of the teams in synch (marketing, sales, product development, and business development), to perform well together, and to continue to improve over time, which will keep your program from flourishing
- Poor target prospect segmenting or poor identification of target buyer roles, which will result in very few qualified leads no matter what else you do
- Poor-quality contact information, which will waste the reps' time as they try to hunt down accurate information
- Poor training of your business development reps, which will make it extremely difficult for them to succeed
- Poor or inconsistent competitive-advantage messaging, which will prevent your value proposition from resonating with your target users and buyers
- Not focusing on productivity metrics separate from conversion metrics, which will make it difficult to identify the issues and opportunities associated with making continuous improvement
- Not doing enough to support your prospecting efforts, which will derail the program, as the success of this practice depends on the entire company supporting it
- Not sharing the results of the efforts with the business development reps, which will prevent them from staying motivated and being inspired by the results of their good work
- Not having a disciplined approach to improve each day, week, month, and quarter, which will prevent you from getting the 2x to 50x improvement in results that are possible if you conduct retrospective meetings on a regular basis.

GETTING STARTED WITH OUTBOUND LEAD PROSPECTING

You can be up and running with your outbound prospecting effort within eight weeks if you put the proper focus and resources against it. This eBook contains a number of documents that can help each of the people in key roles perform their activities relatively quickly.

FOR THE CEO/EXECUTIVE TEAM

- Quick Start Checklist for the CEO/Executive Team (Page 16)
- [CEO's Guide for Hiring an Outbound Prospecting Manager](#)

FOR THE OUTBOUND PROSPECTING MANAGER

- Quick Start Checklist for the Outbound Prospecting Manager (Page 17)
- [Quick Start Guide for the Outbound Prospecting Manager](#), which includes:
- Hiring your business development reps: Helps you understand the type of profile that you should be targeting, and the compensation package that you should consider
 - Establishing your automation platform: Helps you set up your sales automation system to support the practice
 - Crafting your target personas: Helps you develop a first cut set of user and buyer roles and target personas (both user and buyer) for your representatives
 - Defining successful outcomes: A checklist to help you define a qualified lead and opportunity
 - Creating your campaign: Helps you prioritize, plan, source, and deliver the campaign to the representative team
 - Creating your support content: Guidance for crafting the materials necessary for your team to be successful
 - Training your representatives: A sample training schedule for the first three days on the job
 - Engaging your representatives: Tips and tricks for ensuring that your representatives are productive
 - Creating a model day for success: How to structure schedules for optimum success
 - Converting your leads into qualified opportunities: Ideas for conversion approaches
 - Checking, reflecting, reviewing, and adjusting on a daily, weekly, and quarterly basis: How to continuously improve your effort
 - Sample weekly and quarterly report to the CEO and executive team: A sample report for communicating your results

FOR THE BUSINESS DEVELOPMENT REPRESENTATIVES

- Quick Start Checklist for Business Development Representatives (Page 18)
- [Quick Start Guide for Business Development Representatives](#), which includes:
 - Logging onto and using your automated platform: The basics for getting started
 - Your target personas: Understanding the target audience
 - Defining successful outcomes: Defining qualified leads and opportunities
 - Executing the campaign: Understanding the process and the goals for the campaign
 - Understanding your support content: Tools to help communicate with prospects
 - Engaging your targets: Tips and tricks for getting prospects engaged and interested
 - Prospecting dos and don'ts: Tips and tricks for initial contact
 - Your first call: What to realistically expect
 - Executing a model day for success: How to structure the day
 - Converting your leads into qualified opportunities: Basic ideas to get you started with your conversion approaches
 - Checking, reflecting, reviewing, and adjusting on a daily, weekly, and quarterly basis: How to continuously improve
 - Sample daily report to manager: A sample report for communicating results

CHECKLIST

FOR THE CEO/EXECUTIVE TEAM

Use the following checklist to ensure that your outbound lead qualification effort will have the greatest probability of success. The executive team should ensure that all items are checked off and the outbound prospecting manager should ensure that the executive team is following through on the checklist.

- We have discussed, prioritized, and approved this effort as a corporate initiative.
- We have set quantitative goals for this effort.
- We have hired or promoted an outbound prospecting manager who is committed to the goals.
- We have hired a team of business development representatives and they are committed to their daily/weekly/quarterly kpis.
- We have communicated the importance of this initiative to the entire sales and marketing organization(s), and have made clear that it is an important priority.
- The outbound prospecting team has developed an appropriate work plan, and we have approved the resources that will be necessary to execute the plan.
- The outbound prospecting manager will be reporting the results to us weekly and quarterly and we know what to expect.
- We will adjust the communication and the goals based on the results from the effort.

CHECKLIST

FOR THE OUTBOUND PROSPECTING MANAGER

As the manager of a team of outbound prospectors, it is imperative that many processes and tasks are completed/in motion before your reps start dialing. Launching an outbound qualification initiative is not as simple as hiring a cold-caller, giving them a list/computer/phone, and saying, "Start calling!"

Use this checklist as a guide to stay on track when kicking off this initiative. If you are able to check all of the following boxes, your team is very likely to be successful.

- You have chosen the automated platform that best suits your business needs.
- Target personas (both users and buyers) have been identified.
- You have defined qualified leads and opportunities.
- You have established the metrics that your team will be accountable for.
- You have created your first campaign.
- All necessary content has been created to support your team's efforts.
- You have successfully hired a team of skilled business development representatives.
- You have a customized training schedule prepared for your new hires, and all content/resources necessary for training.
- Your team is engaged and eager to hit their established metrics.
- A model day for success has been developed and you and your team members are committed to following the schedule.
- There is a defined process for converting leads into opportunities and the business development reps and sales teams are educated on the conversion best practices.
- You are checking, reflecting, reviewing, and adjusting on a daily, weekly, and quarterly basis.
- You have developed a weekly and quarterly report template to present to the ceo/ executive team.

CHECKLIST

FOR BUSINESS DEVELOPMENT REPRESENTATIVES

Whether you're a first-time outbound prospector, or you have been in a role where you were making 100 dials a day, it's important to review the following checklist to ensure that in your new position, you will generate the maximum number of opportunities possible for the sales team you are supporting.

- I have been instructed on how to log in and use our crm platform effectively.
- My manager has explained the target personas i am calling, and i thoroughly understand both the users' and the buyers' characteristics and responsibilities.
- I have been presented with the definition of an opportunity, as well as the activity goals that i am responsible for achieving on a daily/weekly/ monthly basis.
- My manager has presented me with collateral and coaching to help me follow the campaign.
- I have received thorough training in areas such as product knowledge, competitive landscape/advantage, call scripts, how to handle objections, and role playing, and have been given supporting materials to help me be successful.
- I feel confident and comfortable about making calls.
- My prospects are engaged and interested in our product/services once i have made contact with them.
- My manager has presented me with the schedule for a "model day for success" and i am following the routine.
- I understand what it will take to convert leads to opportunities and the process for passing the information along to an account executive.
- Each week and quarter, my manager and i are constantly checking, reflecting, and reviewing my activities and the response that i am getting from leads in order to continuously improve the initiative.
- Each day I submit a report to my manager that indicates my activities/successes for the day, and at the end of each week I have a retrospective with my manager to review my progress and discuss successes and impediments.

ABOUT THIS eBOOK

This eBook was created by OpenView Labs to help companies build outbound prospecting practices into their sales strategies. It includes checklists and quick start guides for the key roles involved to help your organization implement outbound lead qualification fast.

ABOUT OPENVIEW LABS

OpenView Labs is the strategic and operational consulting arm of [OpenView Venture Partners](#), a global Venture Capital fund that invests in expansion stage technology companies.

MORE INFORMATION

Visit the [OpenView Labs website](#) for more ideas and inspiration for senior managers of technology companies.

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