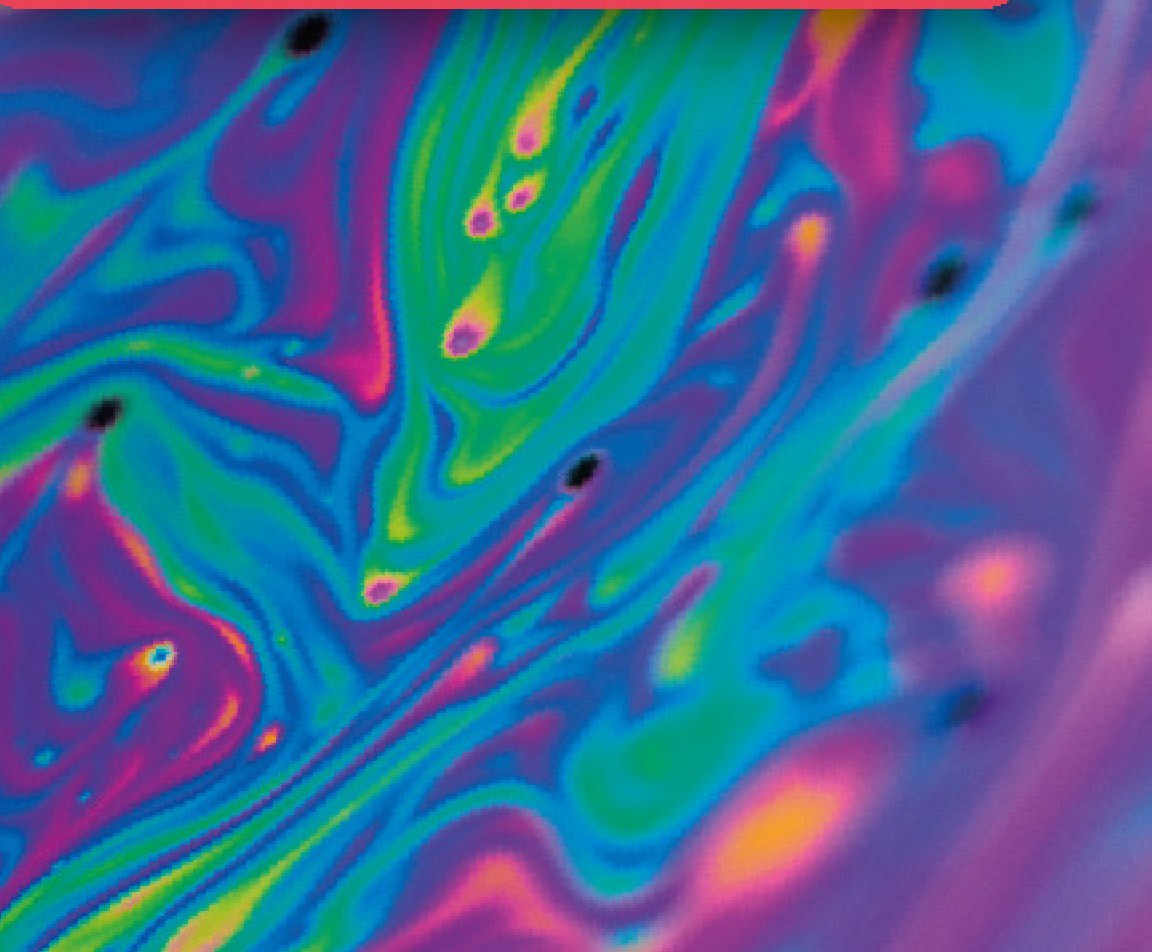
Cognism

THE OUTBOUND

Prospecting Playbook



Contents

Introduction: What is outbound prospecting?

Outbound prospecting is an activity usually carried out by **sales reps** (or SDRs), on a one-to-one basis. The idea is to generate interest from targets (also known as "prospects") who may not know who you are.

The types of **B2B prospecting** activities that sales reps engage in include cold calling, outbound emailing and LinkedIn direct messaging. It's typically a short-term approach, a quick way to identify and qualify new clients, then move them through the sales funnel.

What are the benefits of outbound prospecting?

Outbound prospecting is particularly beneficial for B2B/SaaS startups. Revenue goals can be aggressive at such companies and competition is fierce. There's a constant need to close deals and grow the customer base.

If you're working at a startup company and your pipeline is looking light, outbound prospecting is how you can replenish it quickly. With prospecting, you can book appointments with qualified leads, fast. You'll have to think on your feet and be comfortable with frequent rejection, but if your salespeople have the **right skills,** you can achieve impressive results.

What are the main outbound prospecting activities?

There are three main outbound prospecting activities that sales reps typically engage in:

COLD CALLING	OUTBOUND EMAIL	SOCIAL SELLING
Contacting prospects via the phone, qualifying them and then arranging a meeting.	Contacting prospects via email, containing compelling and personalised content.	Engaging with prospects on social networks - in B2B, the main one is LinkedIn.

The combination of all these activities is known as a "sales cadence".

The goal of these outbound activities is to persuade the prospect to agree to a live demonstration of a product or service. This is called a "sales demo". The demo is usually handled by a Business Development Manager (BDM) or Account Executive (AE).

If the sales demo goes well, then the BDM will negotiate and close a deal with the prospect.

Here is a visual representation of the outbound prospecting process:

Outbound prospecting

Reaching out to prospects via phone/email/social media

Qualification

Evaluating if the prospect is right for your company

Demonstration

Conducting a live demo with the prospect

Closing

Negotiating terms with the prospect and making a sale

Outbound prospecting explained

Over the course of this playbook, we're going to show you all the techniques that will help you become an outbound prospecting champion! Here's what you'll learn:

- ☑ How to calculate the total market available for your product or service and home in on your ideal customer.
- ☑ How to effectively cold call and book meetings with prospects - featuring Cognism's own cold calling script for software sales!
- ☑ How to use emails for outbound prospecting and ensure they always arrive in your prospects' inboxes.
- ☑ How to become a master at social selling on LinkedIn.
- ☑ How to put all these techniques together in a sales cadence - featuring the ultimate B2B prospecting cadence as used by Cognism's SDRs!
- ☑ How to conduct winning sales demos and close deals.

Welcome to ***The Outbound Prospecting Playbook,*** presented by **Cognism,** the world's best all-in-one prospecting solution. Let's get started!

How to define your ideal customer

Before you can start outbound prospecting, you need to know who you're going to target. Here's Cognism's guide to developing your Ideal Customer Profile.

Your Ideal Customer Profile, or ICP, is a comprehensive description of your perfect customer; the kind of customer that can find massive benefits from your product or service, while also being able to give you enough value in return to make your business profitable.

Why is ICP important for outbound prospecting?

ICP brings several benefits to an outbound sales team:

High-quality leads

Your ICP will help you generate better quality leads that are more likely to convert.

Whether you're doing your own lead gen or bringing external information into your organisation, your ICP can be your north star to ensure you are targeting the right people.

Better outbound

When you get granular with your ICP, going deep into the pain points, hopes and fears, you can tailor your outbound to be super-effective.

Whether it's cold call scripts, outbound email sequences or anything else, you can really focus on your customer pain points and position your product as the solution.

Consistently beat targets

You know the benefits that your ICP will get from your product. This means you can go out and sell them.

Whether it's targets such as the number of conversations or meetings, or hitting your ambitious revenue goals, knowing who you're selling to is essential.

Save time and resources

Time is precious. Don't waste it trying to sell to people who will never buy.

Your ICP allows you to generate leads with businesses who need your product and can pay for it. ICP helps you drive efficiency in your sales team.

More revenue!

When you put all this together, your ICP helps your sales team sell more effectively and efficiently.

It all points in one direction - bigger revenue figures! B2B organisations without an ICP are leaving money on the table.

Creating your ICP in 5 simple steps

Now you know the benefits that having an ICP can bring to your B2B organisation, here are five steps to creating the right ICP for you.

1. Identify your super-users

It's likely that your ICP is already your customer. All you have to do is work out which one it is. Here are some ideas to get you started:

- Analyse your data - which of your existing customers are getting the most value of your product?
- Think about the people who don't just use your product, but the people who love it and get more value out of it than the average user.
- Narrow your customer base down to ten super-users for the purposes of creating your ICP.

2. Interview your super-users

How can you find out what your best customers love about you and your product? It's easy - ask them!

- Set up individual phone calls or Zoom meetings with your ten super-users.
- Ask them about their experiences with your product.
- The end goal is to find out about:
  - Their buying processes.
  - How they found you.
  - Why they purchased.
  - How they're benefitting from your product.

3. Analyse the data

You've conducted your interviews and collected your answers. Now it's time to find out what it all means.

- Once your interviews are done, gather the data you've acquired.
- Study the profiles of your super-users.
- Look for common attributes. Are there any recurring patterns or shared characteristics? Is

there anything that connects them?

- Identify the correlations and use the insights as you move on to the next stage.

4. Create your ICP template

Here's the part where you put it all together.

At Cognism, we use a template to build up a detailed picture of our ICP. Here's an example which you can adapt and start using straight away!

COGNISM IDEAL CUSTOMER PROFILE

Industry
B2B Sales, SaaS

Geography
USA

Company Size
50 employees

Budget
$10,000/month

Buying Process
Reliance on referrals for buying decisions

Decision Makers
CEO, CRO

Pain Points
- Generating high-quality C-suite leads
- Automating outbound email campaigns
- Increasing sales team productivity

Business Goals
Short term: grow their client base by 20% over the next 3 months

Long term: raise their next funding round and expand their sales team

Technologies
Salesforce CRM
SalesLoft
Chili Piper

Attributes
Primary social media channel = LinkedIn
Gaining a reputation as SaaS industry thought leaders
Uses ABM strategies

5. Refine your ICP

The ICP process doesn't end once you have created it. You have to keep refining and improving your ICP to adapt to changes in your audience and your industry.

Here are some ideas:

- **Look for feedback from your customers -** talk to the person that deals with customer feedback in your business. If you're in tech or SaaS, G2 is an excellent resource for customer opinion.
- **Examine your website traffic -** which pages on your site are generating the most heat? It can help you find out what your ideal customers are currently interested in. Look into where your visitors are coming from. Information like this can help you refine your marketing channel choices.
- **Look at your financial data -** which customers have the largest lifetime value? Which customers drive the biggest profits? Look for patterns in your figures that can help you improve your ICP.
- **Look for patterns in closed-won deals -** Are there patterns in your recent successful deals? Are they coming from one particular channel? Are you doing anything specific during the sales process which is boosting your chances of success?

Your ICP defined

Follow the steps outlined above to discover your ICP. Use it as a springboard for outbound prospecting success!

What is TAM and how to calculate it

The next step in outbound prospecting is to discover the total number of ideal customers that are available to you. Here are some methods for calculating your TAM.

Your **Total Addressable Market,** or TAM, is the total number of people in your target market. The figure doesn't take into account the likelihood of them buying your product, nor does it consider their availability. TAM is a measure of potential.

Calculating your TAM is the crucial first step to creating an **outbound sales** plan. It's the cornerstone of strategic planning and it facilitates each of the following processes:

- Identifying new revenue opportunities.
- Calculating your total potential revenue.
- Finding investors.
- Planning your outreach.
- **B2B lead generation.**

- Setting achievable goals.

Once you've calculated your TAM and used it to develop a **B2B sales strategy,** you're ready to start prospecting!

How to calculate your TAM

There are two fundamental ways of measuring your TAM.

Top-down TAM analysis

This method of TAM identification is quick. It's also possible even if you have little knowledge of the market you're targeting. To calculate your TAM using this method, first consider the total number of people in the area you are targeting, then, add additional filters to narrow down your results.

Take the example of a graduate recruitment agency in Cornwall:

500,000

They know that there are 500,000 people in the city.

→

5%

They also know that 5% of these people are between the ages of 18 and 28.

→

25,000

By multiplying 500,000 by 5%, you can estimate a market size of 25,000 people.

You can add more filters to refine this further, but the calculation still involves a lot of guesswork. For this reason, you should identify an upper and lower bound, and make an estimation somewhere in the middle. It's better to be more conservative with this estimation if you want to avoid falling short of your targets!

If you're looking for a higher level of accuracy, consider this next method.

Cognism TAM analysis

With Cognism's B2B prospecting tool, **Prospector,** you can get a much more accurate representation of your TAM. By analysing your current client base and using it to run a search for similar people you will discover opportunities you didn't know existed. Here's how it works:

Step 1: Customer analysis

Cognism's Customer Success team will help you to analyse your existing client base and look for trends. These could include job titles, industries, company sizes and locations that you have had particular success with.

Step 2: Expanding your market

Based on your findings, they will consider other areas which you have not had as much experience with that could be worth contacting. Understanding why your product resonates with your users can help you to scale up your business.

Step 3: Search for your ideal buyers

Use the information you've found to run a search in Cognism Prospector for similar people. This will show you the number of people who fit this description. This is your TAM.

The benefits of the Cognism method

One of the benefits of using Cognism to identify your TAM is that you can accurately identify your total market size. Then you can segment it to find the number of relevant people in each area. This can be incredibly useful for strategic sales and marketing planning.

The bottom-up method

The bottom-up method can be used to make an estimation of your total potential revenue. Simply multiply your TAM with your pricing.

Let's consider the graduate recruitment agency in Cornwall again:

We established their TAM was 25,000 people. Let's say they charge a single fixed fee of £500 per person recruited. By multiplying these numbers, we find that they have a total potential revenue of £2.5 million.

It's worth mentioning again here that with a more accurate TAM calculation, you will get a more accurate potential revenue figure.

Which TAM analysis method is right for you?

If you're still in the investigation and research phase of an entrepreneurial journey, the top-down method of TAM analysis is a useful tool. Use it to gain an insight into potential markets and estimate the value of your offering.

Top-down is also valuable if you're redesigning your offering, since this doesn't require absolute precision, just an idea of which way you should go.

If you want to go into more depth and really understand your target market, it's definitely worth looking into Cognism Prospector.

Cold calling

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For most SDRs, the number one outbound prospecting activity is cold calling. It's also one of the hardest to master. **Saif Khan,** *Cognism's Business Development Manager, explains his process.*

Saif Khan is one of Cognism's success stories. Since he joined the company in June 2019, he has smashed every target put in front of him.

As an SDR, Saif generated more sales-qualified leads in one quarter than any rep in Cognism history. Now a BDM, Saif has already produced more than £10,000 in monthly recurring revenue.

Saif's secret is his mastery of the **cold call.** Many salespeople are nervous about picking up the phone and pitching to a stranger, but when you get it right, it's the most powerful outbound prospecting tool out there.

Here are Saif's five top cold calling tips.

1. Research the prospect

Before you pick up the phone, know who you're calling. You'll already have a good picture of your ideal customer from your ICP and TAM analysis - but there are other things that can help you on your way to cold calling success.

Log in to LinkedIn and research the prospect and their company thoroughly. Take in as much information as you can about them. Look for a connection or a possible angle you can use in your pitch.

After that, it's time to get dialling. The first thing you must do on your call is ask for the prospect's permission to continue. It shows that you're empathetic and respectful of their time. This is especially important during this year, when many businesses have been negatively affected by coronavirus.

Once you've got permission (and it's worth noting that people rarely want to say *"no"*), it's time to go into your pitch. This part should be no more than 30 seconds long.

2. Ask questions

"The best approach is to list out the prospect's pain points as you see them. Ask the prospect if they recognise them. If they say ***"yes",*** ask for more information. The more info you have, the more successful your cold call will be.

Asking questions creates a back-and-forth dialogue and helps you build rapport. However, your questions must get to the heart of the matter. Every question you ask must identify a pain point - for example, ***"How much time do you spend finding new business?"***

The best type of questions to ask are open-ended questions (i.e.: questions that don't require a ***"yes"*** or ***"no"*** answer). They're a device that gets the prospect to open up further and share more information with you.

3. Offer solutions

Once you've identified the pain, you can begin to position your product as the solution.

Another example - if the prospect mentions that they use Salesforce, you can say ***"We integrate with Salesforce."*** Then, you can show them the impact your solution can have on their existing process. Have some numbers of stats on hand to back up your claims.

4. Make an assumptive close

After you've sowed the seed in your prospect's mind that your product can be the answer to their problems, it's time to take it to the next level.

Make an assumptive close to your call. If your goal is to get your prospect to book a time for a sales demo, make it clear that they will see more value from seeing the product in action rather than having you explain it to them over the phone.

Go for the close by asking them: ***"Do you have time to see it?"***

5. Do your admin

You've booked your demo and you've ended the call. Well done! However, it's not time to strut around your office high-fiving your colleagues - it's time to do your admin!

Log your demo notes in your CRM straight away. Make them as detailed as you can - every piece of information could be useful in the future.

You must also follow through on anything you agreed with your prospect. If you agreed to send them an invite, do it straight away.

Then you can do some high-fiving!

BONUS TIPS

Saif shared with us some extra tips to help you succeed at cold calling:

Take handwritten notes during your cold call

You won't remember everything, and you'll need all that information for the rest of the sales process. Also, you can refer to your notes during your call if you need to.

Record your cold calls and listen back to them

You might discover a nugget of information you missed at the time. It will also help you refine your technique.

Use your mobile to make cold calls

Connection rates are often higher from mobiles.

The ultimate cold calling script for software sales

Presenting the cold calling script that Cognism SDR ***Sam Gibbons*** *uses to prospect IT/software companies!*

Sam Gibbons is one of Cognism's newest SDRs.

He joined us in February 2020 and since then, he's been doing the hardest job in **B2B lead generation** - cold calling prospects, pitching products and booking meetings. Sam's target market is software sales - a category which encompasses IT and tech companies across the world.

When cold calling his prospects, Sam uses a script that he's developed himself. It's perfectly geared towards IT and tech leaders and has helped him achieve some fantastic results, including:

- Exceeding his target in March 2020, which due to the coronavirus crisis was one of the most challenging months ever in **B2B prospecting!**
- Booking 33 demos in the 33 working days from 1st March to 3rd April, which works out as exactly a demo a day for 33 working days.

We present Sam's software sales script to you now, so that you too can find success in prospecting to an IT/tech audience. The script aims to gauge interest and qualify at the same time, while also giving the cold call a structure and consistent flow.

The script is broken down into 7 sections.

1. The intro

Start with a friendly, conversational introduction. Always give the prospect your name and the company you represent.

> *"Hey [name], Sam from Cognism here. How are you?"*

If the prospect answers positively, you can respond with...

> *"Great! I appreciate I've called you out of the blue. Is now a bad time?"*

The logic in asking ***"is now a bad time?"*** is that prospects naturally want to say ***"no".*** This question sets them up to do so - Sam got this tip from **Never Split the Difference,** the bestselling book by **Christopher Voss.**

2. The opening pitch

Sam designed his **cold calling** pitch to give the prospect some context about what Cognism does, without giving away the key value proposition. The idea is not to reveal too much at the beginning - you want the prospect to follow up with some questions.

> *"Fantastic! So [name], I just wanted to give you a quick call as we're currently doing lots of work with [tech/software company of a similar size], as well as a variety of other tech companies like you guys. We help our clients by giving them a tool which they can use in-house to generate direct contact information for key decision-makers within their target markets."*

A good tip is to demonstrate that you've done your research on the prospect's business - you can do this by quoting the types of industries that they're prospecting to! Like so:

> *"I can see that you target [industry/industries]. How are you finding leads from within that sector / those sectors?"*

Sam ends his pitch with a question. It's simple and open-ended, but it also provides plenty of scope for the prospect to answer in great detail.

3. The discovery

Discovery on a cold call is important for two reasons:

- It enables you to determine whether or not the prospect is a good fit, helping you to qualify in or out.
- It helps you to understand their current processes, meaning you can better explain how your solution adds value.

Sam has several questions that he uses to discover more about his prospects. Here are some examples:

> *"How are you generating your leads?"*

The prospect may reply quoting LinkedIn, a **B2B data** competitor, networking, or they might not generate their own leads; they may thrive off of referrals.

Whatever the prospect's answer is, you can use it to draw a direct comparison between their current process and your solution. Think about how your solution can solve a problem in that process or how it can speed it up.

It's best not to be too general, though - be specific to the prospect and their industry. Your message must be delivering value to them.

> *"Which channels do you use to reach out to your leads?"*

The prospect may answer with one, some or all of the following: phone, email, LinkedIn.

Use the information they give you to tailor your **cold call.** For example, if their main outreach channel is email, then you don't want to be talking about the accuracy of your phone numbers!

Instead, you'll want to emphasise the effectiveness of your product when it comes to email. At Cognism, our message would be how our validated email addresses have 97% deliverability, which means a lower bounce rate.

Sam recommends that you have some stats to hand when you cold call - they're a very good and quick way to demonstrate value.

> *"What's your target market in terms of job title/location/company size?"*

This is a good question to ask, as it enables you to get specific. Let's say the prospect replies with: ***"HR directors working in UK tech."***

Instead of replying with:

> *"We have 400 million B2B profiles which you can segment down to find your target market..."*

You can reply with:

> *"We have 400 million B2B profiles, which you can segment down to find an extensive list of HR directors working in the UK tech space..."*

You can see that the questions you ask should always have a purpose - to resonate with the prospect and bring them back to your product's value.

4. The second pitch

This is the stage in your cold call where you can pitch again, in more detail this time. Explain how your solution addresses the prospect's pain or needs.

Base the second pitch on everything you learned in the discovery phase. The more relevant it is to the prospect, the more engaged they'll be!

Sam's second pitch looks like this:

> *"Fantastic! So, [name], to give you a little more context, Cognism is the world's largest GDPR-compliant database consisting of over 400 million B2B profiles. How it works, is you would run highly-targeted searches for [target market: e.g. HR Directors in UK tech]."*

> *"This would generate a list of contacts, and for each individual, we would provide you with [data points relevant to them based on the channels they use: e.g. if they only use emails because their outbound consists of email marketing campaigns] "...email addresses with 97% deliverability."*

5. The value

The next step is to immediately explain why your current clients have switched from their old process to using your product. You also need to show the value that doing this has added to them.

Here's how Sam does it:

> *"The main reason why our clients have typically moved from [current process: e.g. LinkedIn] is because [explain how our solution can add value]."*

A top tip when talking to tech and software companies - put emphasis on the technological aspects of your product!

For instance, at Cognism, we use our patented **Revenue AI** engine to update our data in real-time. So, when talking to prospects in tech, it's good to bring up these elements. Again, it's about tailoring the message to the audience.

6. The case study

You can strengthen your cold call with a **case study** that's relevant to the prospect. Describe the results they achieved using your solution.

Sam sets it out like this:

> *"We're actually working with [similar client] right now. They managed to achieve [result] in [time frame]."*

7. The close

Some say this is the trickiest part of a cold call! But really, there's not much to it. Simply be assertive and clear. A good idea is to suggest that your cold call is actually a waste of the prospect's time - wouldn't they rather see a sales demo?

> "Look, [name], rather than me rambling on at you, would you be totally against seeing the platform over a 15-minute call? I could run some personalised searches for you based on your target market and show you the quality and quantity of data that we have."

Again, prospects naturally want to say ***"no",*** so by asking ***"would you be totally against seeing the platform?",*** you're putting the prospect in a position of authority.

BONUS TIPS

Sam gave us some other, more general tips to help you with your software sales cold calls.

- Say the prospect's name a lot to build rapport (as recommended in **How to Win Friends and Influence People** by Dale Carnegie).
- Be an active listener - repeat what the prospect says back to them to show you're listening and engaged. For instance: ***"Okay, so your sales team are finding their leads through LinkedIn and reaching out via cold calling and email. Fantastic, so...[next questions/follow up with how you can add value.]***
- Tonality - be aware of how you speak. Don't be robotic! Develop a conversation that is warm and comfortable for you and your prospect.
- Refer to any customers of yours that are similar to the prospect's business - this can be based on company size, industry, location, etc.
- Try to back up your cold call with case studies if possible. Create a **"Jones effect"** around your product - if the prospect's peers are using it, then they'll want to check it out too!

Motivating your outbound prospecting team: 6 top tips

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Cold calling can be a very challenging activity. Studies have shown that only 2.5% of cold calls are effective. How can you keep your outbound prospecting team motivated? **David Bentham,** *Cognism's Inside Sales Director, shares his advice.*

In the current "working from home" environment, motivating your colleagues is more important than ever. A motivated team is a happy team, and a happy team is going to produce results. People that are happy and engaged are always going to perform better than anybody else.

At Cognism, we put a lot of effort into motivation and training. We believe that if you build a supportive and inclusive sales culture, it pushes people to achieve their best.

In Q2 of this year, due to coronavirus, my sales team was expected to hit 50% of their quota. Instead, they reached 100% of their original, pre-coronavirus target! That shows the power of getting motivation right.

These are my tried and trusted techniques for keeping SDRs happy and motivated.

1. Offer continuous training and development opportunities

It's common for sales professionals to feel like their progress is stagnating over time. By providing training, you will help them to unlock their potential. As they progress, your team will feel more confident and motivated.

Here's what we provide at Cognism:

- 3 hours of training per week for each member of staff, regardless of seniority. Even the most experienced sales veterans take comfort in knowing they have room to grow.
- Whenever a new SDR starts, I assign them a mentor. This provides them with a place to ask questions and get valuable feedback.
- We regularly bring in external trainers. This helps the team to diversify their skill-sets while exploring new ideas. I always ask our SDRs to request specific training sessions, if we're not providing them already.

Offering continuous training will create a dynamic, fulfilled and motivated team.

2. Be transparent about the business and team objectives

If your team understands the company's goals, they will understand their individual goals. This prevents demotivation, as team members will get a better idea of the impact they're having on the company's growth.

In a team, it can be easy to get wrapped up in your personal performance and forget about the bigger picture. This, over time, can make an employee feel less valuable.

When setting **B2B sales KPIs** for my SDRs, I explain the business goals to them and how their personal targets will help the company to achieve those goals.

If the company has a goal of reaching $10 million ARR, it's the team leader's job to make sure each individual knows how they, personally, can work towards that goal.

3. Base your team structures on the people you are hiring

We all know the importance of **hiring the right salespeople,** but to get the most out of them, it's vital to create team structures with them in mind. Yes, the goals you set for your employees must be based on the goals of the business, but you must also recognise and respect their personal goals.

Cognism hires a lot of graduates for entry-level sales positions. We grant employees greater responsibilities in a shorter space of time if they're consistently meeting their targets. This is proven to motivate graduate employees.

Building a team structure that fits the team will make your colleagues feel comfortable and confident. It's a great foundation for personal growth.

4. Make performance goals attainable

At Cognism, at least 80% of our sales team are meeting their goals every month.

The goals I set my SDRs are a minimum expected result. It's important for leaders to recognise that setting overly-ambitious goals which are too difficult to meet will only end up demotivating your team.

Similarly, if the goals are hard to achieve because they're relevant to the team, but not the individual, this will also demotivate your staff. People go into sales to be rewarded for their individual performance; this self-starter attitude should be celebrated!

Once your team starts reaching their goals early, increase the bonuses exponentially. This will reward employees who go above and beyond and will ingrain high performance into the company's culture.

5. Sell your incentives!

Offering incentives can be a great way to introduce some fun, healthy competition. For these to work best, you need to sell your team on them!

If you're going to use incentives, make sure that every person in your team could win it. Certain people will always be the highest performers, and they will already be rewarded with their commission. Extra incentives should be available to any member of the team.

One way of maintaining a level playing field is by incentivising input rather than output. For example, give a prize to whoever makes the most cold calls in a month, rather than whoever closes the most deals. Less experienced employees will be motivated by the chance to take on the top performers and win!

Here's another incentive I regularly run - the scratch card incentive! What I do is this:

- I separate the team into pairs, based on experience, and buy one scratch card for every pair.
- Whoever has the best numbers at the end of the month gets to scratch it!

To make sure the team are sold on this incentive, I'll buy the scratch cards with the highest potential prize. Every week, I'll remind the team of their progress and the jackpot they could win!

It's a fun competition which motivates the team to outperform their peers, especially when the alternative could be missing out on a £1 million winning scratch card!

6. Make sure your team have all the tools they need

When it comes to providing SDRs with the tools they need, my message is clear: if there's something the team needs that could improve their job, we'll provide them with it.

This means investing in the best CRM on the planet, creating our own **CRM extension app,** providing the best outreaching tools, and providing the best **B2B data.**

If you give your SDRs everything they need to succeed, you'll create an environment in which they can thrive.

FINAL THOUGHT

Motivation can be cultivated through a combination of:

- Company goals.
- Individual goals.
- Provision of incentives and great tools.

But ultimately, they all serve the same purpose: the development of a positive mindset.

SDRs face a lot of rejection, and in the wrong conditions, can quickly become demotivated. Every motivational technique that you put in place should make your team's lives easier. Once you've done that, they will be able to focus on fulfilling their ultimate goal - selling!

Outbound email

Three SDRs from Cognism's outbound prospecting team share their advice on crafting outbound emails. Plus, they delved into their inbox analytics and gave us their most successful messages.

According to Campaign Monitor, nearly **129 billion business emails** were sent and received PER DAY in 2019. With so many businesses now working remotely due to the coronavirus crisis, that number is certain to increase in 2020.

That represents a huge challenge for SDRs. How can you make your sales emails stand out and beat the billions of rivals vying for your prospects' attention?

Luckily, help is on hand from Cognism's SDR team! Read on for their outbound email guide.

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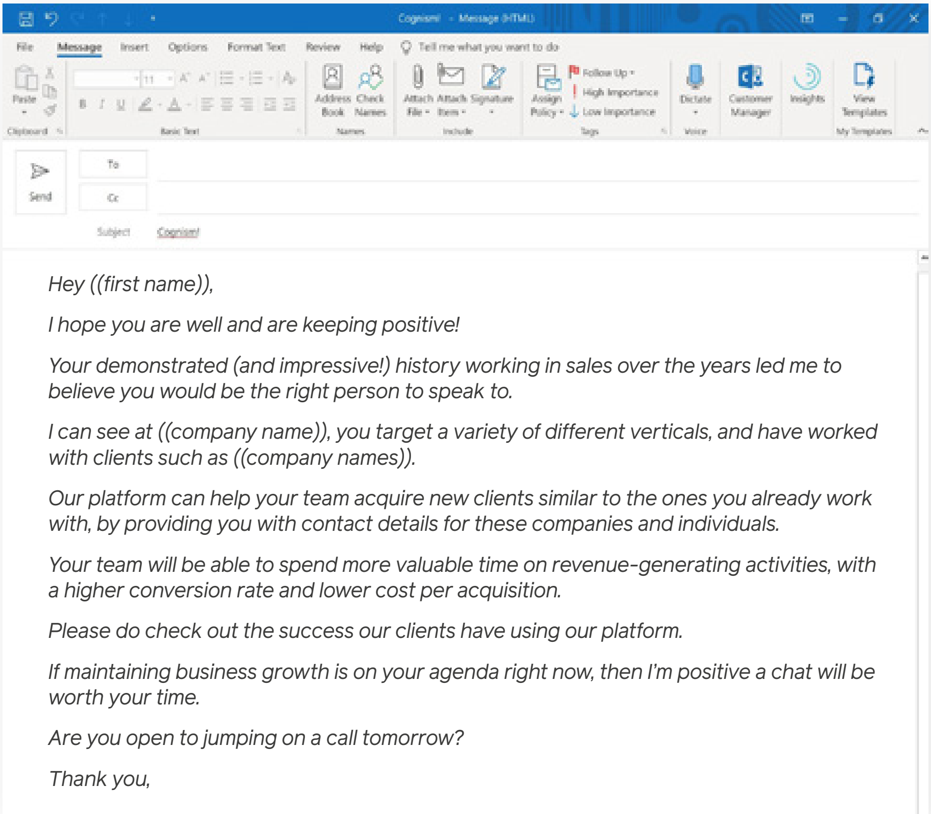
The first email in a cadence

Rachel Goldstone joined Cognism as an SDR in February 2020. Since that time, she's been delivering fantastic results - and particularly on email, which is a channel that she's made entirely her own.

We asked Rachel for her insights into the first email in a prospecting cadence. Here's the template that she uses:



Hey ((first name)),

I hope you are well and are keeping positive!

Your demonstrated (and impressive!) history working in sales over the years led me to believe you would be the right person to speak to.

I can see at ((company name)), you target a variety of different verticals, and have worked with clients such as ((company names)).

Our platform can help your team acquire new clients similar to the ones you already work with, by providing you with contact details for these companies and individuals.

Your team will be able to spend more valuable time on revenue-generating activities, with a higher conversion rate and lower cost per acquisition.

Please do check out the success our clients have using our platform.

If maintaining business growth is on your agenda right now, then I'm positive a chat will be worth your time.

Are you open to jumping on a call tomorrow?

Thank you,

RACHEL'S EMAIL TIPS

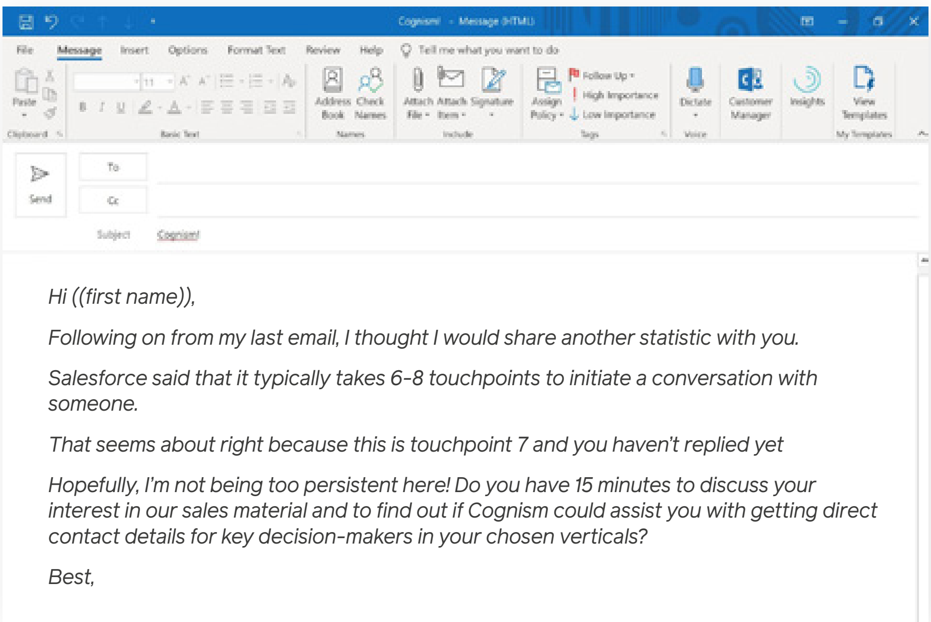
- Always research the prospect and their business thoroughly before writing your email. Include as much of your research as possible in your email.
- Personalise your email. The first email in your cadence should be 20% personalised. Always include the prospect's name and company name.
- Don't bombard the prospect with too much information. Don't give too much away! Instead, spark the recipient's curiosity. Less is more!
- Include links to relevant content - in this instance, the email contains a link to Cognism's case studies library, which the prospect can browse at their leisure.
- Try out this as a **subject line: *"A question for you, ((first name))".*** You can see higher open rates by using this subject line!

Cognism

Email following a content download

Before his recent promotion to BDM, **William Gay** worked tirelessly as a Marketing Development Representative in Cognism Sales. Part of his role was to engage with prospects who had downloaded our content.

Here's an email that Will used for this purpose, which received reply rates of up to 20%:



Subject: Cognism!

Hi ((first name)),

Following on from my last email, I thought I would share another statistic with you.

Salesforce said that it typically takes 6-8 touchpoints to initiate a conversation with someone.

That seems about right because this is touchpoint 7 and you haven't replied yet

Hopefully, I'm not being too persistent here! Do you have 15 minutes to discuss your interest in our sales material and to find out if Cognism could assist you with getting direct contact details for key decision-makers in your chosen verticals?

Best,

WILL'S EMAIL TIPS

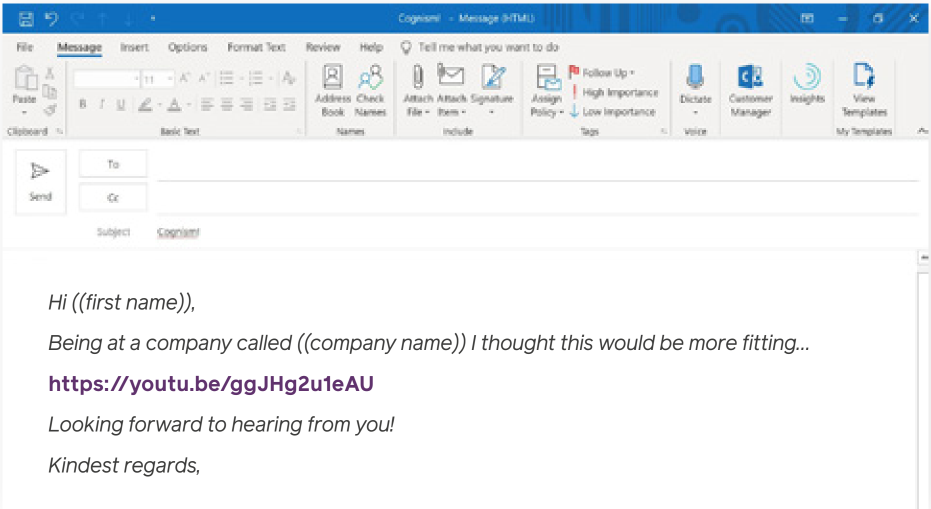
- Keep your emails as short as they can be. 100 words max!
- Try out this subject line: ***"Cognism referred by ((colleague name))".*** It can be very powerful to mention in your subject line that you've been referred by someone else in the prospect's company.
- Don't be shy in bringing out your humorous side! Emails containing an element of humour are usually the most successful, boosting reply rates to 28% or more.
- A/B test your emails. Split your prospect list into 2 groups. Send one style of email to the first group, and another style of email to the second group. Whichever email performs better is the one you'll use going forward. Be guided by the **B2B data** in everything you do.
- Timing - schedule your emails to send at 6-7am, so they're the first thing your prospect sees when they log on in the morning. If the prospect lives in a different country to you, be aware of the time difference!

Cognism

Email containing video

In Cognism's sales team, **Tom Gyngell** has become a master at using video in his emails. It's a skill that all modern sales reps have to acquire - after all, emails that contain videos see **open-to-reply rates increase by 8x!**

Here's an email that Tom sent to a video conferencing prospect, with his Vidyard embedded:



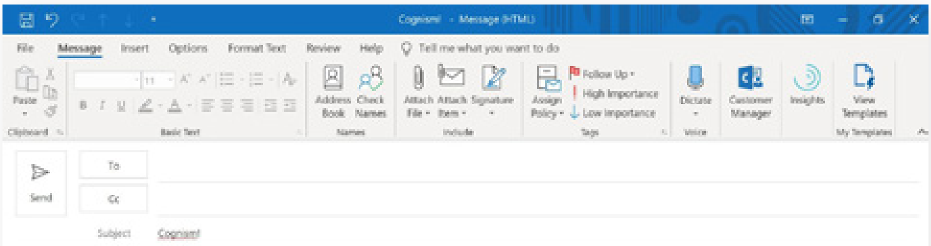
TOM'S VIDEO TIPS

- As this email contains a video message, you can afford to keep the email copy very short and snappy!
- Have the prospect's LinkedIn profile or company website open as you record your video. Scroll through the page and use the information you see in your video.
- Use the prospect's name a LOT. This is crucial for building rapport during your video.
- Never go over 90 seconds. The shorter your video, the more likely it is that the prospect will watch it!
- Ask for feedback at the end of your video. This is a good technique for starting a conversation with the prospect.
- Block out time in your calendar to record all your videos in one go. Say, an hour at lunchtime when you're not making cold calls.
- Whenever you connect with a prospect on LinkedIn, send them a video straight away. You'll see increased conversion rates with this approach!

Cognism

The last email in a cadence

The last email in a cadence (also known as a “break-up email”) can be the hardest one to write. You want to close things off, but also leave it open. Rachel Goldstone provided us with a break-up email that she uses in her cadence. Here it is:



Hey ((first name)),

I’ve been so persistently trying to reach you, but not sure how much more I can handle our one-sided relationship....I’m starting to feel like a bit of a stalker, ((first name))!

If you are open to helping me deal with my rejection and heartache, please choose one of the following options:

- *Give me 5 minutes of your time to explain why I have been stalking you*
- *Cry it out with me to this old school gem by Etta James* **https://www.youtube.com/watch?v=nP-8dzS1_rM**

If neither option tickles your fancy, please let me know a better time to reach out?

Miss you already,

RACHEL’S EMAIL TIPS

- The final email is where you can really indulge in some humour. Get the prospect smiling when they read your email! You never know, it might just be the catalyst for them to hit “Reply”!
- The opening line is the most important line in an email. After the subject line, it’s the thing most prospects look at before making a decision to read on. Take your time in crafting your opening line. Make it strong and compelling.
- Always include a final question or CTA at the end of the email. It’s a possible end, not the definite end, to this opportunity!
- The 3 top email metrics to track are: open rate, read rate and click-through rate. Study these 3 KPIs for every email you send.

I'm an SDR, get me out of spam!

You can't do your job as an SDR if your outbound emails keep ending up in your prospect's spam folder! Here's Cognism's guide to getting out of spam.

It's every SDR's worst nightmare. You spend valuable time sweating over your keyboard, composing the perfect outbound prospecting email to send to your prospect. You press 'Send', then...nothing! Eventually, you find out your prospect never read your masterpiece because it went straight into their spam folder!

At Cognism, our experts who ensure our emails always get to their destination are **Olivia Carden** and **Marianne Dupuy.** They're our Technical Support and Implementation Managers. They've put together a guide to help SDRs avoid that pesky spam box.

What is spam?

Quite simply, spam is unwanted emails. Usually sent in bulk, spam is often considered the electronic equivalent of junk mail.

Why does spam occur?

Most B2B companies use Gmail or Outlook as their mailbox providers. They have developed filters that analyse every email as it arrives. These filters decide whether the email should go into your main Inbox or your spam folder.

How do spam filters work?

If your outbound prospecting emails are going to your prospects' spam, it's because their provider's algorithms think you're spamming them. Each mailbox provider has their own way of detecting spam, which they are constantly updating to keep up with different trends.

For example, Gmail's filters are highly-engagement and content-led. If Gmail detects that many recipients are opening, reading and forwarding your bulk emails, they are more likely to filter it to the Inbox.

How do I know if I'm in spam?

The clearest sign that your emails are going to spam is if you're receiving fewer responses than usual. Check the stats on your email marketing software (if you use it).

If the read rates are lower than normal, it could be because you're in the spam folder. If you receive a high volume of bounce receipts telling you that you're landing in spam, that's proof. Time to take ACTION!

What should I do next?

If you think you're in spam, you can test your emails on your colleagues. Send them the same email you send your prospects and see if it goes to their spam folders. You can also ask your technical support team to run a deliverability test.

Whenever you think your **B2B sales emails** might be ending up in spam, you should act fast to remedy the situation. SDRs can never be effective if their emails aren't hitting their targets.

Prevention is better than cure

Before we share some tips on getting out of the spam box, let's talk about ways you can make sure you never end up there in the first place.

The best piece of advice is to try and make your **outbound email** look like, well, not an outbound email! Do as much as you can to make it look like something you'd send to a friend.

Avoid having too many links

Don't pack your email with links. So many emails are filled with links and spam filters don't like it. Watch out for:

- Links in your signature
- Links to calendar
- Links to reviews
- Links to videos
- Links to blogs
- LinkedIn links

We recommend the maximum number of links you should have in your email is 4. Try to make it fewer.

Be careful with sending limits

Also, you don't want to send your emails sporadically (e.g.: 5 emails one day, 100 emails the next). The spam filters will notice this and mark you down because of it.

Be consistent with your sending. Make sure you send a steady flow each day (if you're struggling with this, **Cognism Prospector** has email sending limits built-in).

Personalisation makes perfect

To make your email look as much like something you'd send to someone you know, get as personal as you can. Use merge fields to get names in there and make sure everything you send is relevant to the recipient (again, Cognism Prospector can help with this).

Spammy buzzwords are bad!

Avoid using spammy buzzwords like *"free"*, even in lines such as, *"Are you free for a chat?"*. Those are the kinds of words that could be associated with scam emails, especially if used constantly. Instead, say, *"Are you available for a chat?"*.

How do I get out of spam?

If you find yourself in the spam folder, don't panic! Keep sending your outbound emails, but make sure you follow the safe sending guidelines we've listed above. Remove as many links as you can, eliminate spammy words or phrases and personalise your emails properly.

Here are some other tips:

Don’t forget the subject line

You should also check your emails’ subject lines. Never put ‘Re:’ at the front of a subject line unless it’s a genuine reply. Mailbox providers have cottoned on to this trend and will deem this spammy behaviour.

Try sending to other accounts

Send emails daily to other accounts, such as your colleagues’ external and internal email addresses. Ask them to mark your emails as ‘Not Spam’. This will give the filters information that your emails have value.

Only send to valid leads

Finally, be more targeted with your emails. Lower your daily sending limit on your email automation software. Make sure you only send emails to valid B2B leads and highly-engaged contacts. Where possible, strip out any non-interested people from your lead lists.

Most importantly...

Above all, be patient! Getting out of spam doesn’t happen overnight. It takes time and effort, but it’ll all be worth it when your prospects are fully engaging with your emails once more!

See our quick guide

Here’s a quick guide to all the steps you need to take if you end up in spam. Refer to it whenever you’re in trouble!


STEP 01
Confirm your email/domain is in spam by running a deliverability test
STEP 02
Check your email stats
Low response rates = BAD
High bounce receipts = TAKE ACTION
STEP 03
Keep sending emails, but follow the safe sending guidelines
STEP 04
Make emails as personalised as possible using merge fields
STEP 05
Reduce the number of links per email to 4 or fewer
STEP 06
Avoid spam buzzwords and use engaging subject lines
STEP 07
Send emails daily to other accounts and have them mark as 'Not Spam'
STEP 08
Lower your daily sending limit
STEP 09
Send emails to only valid leads - high engagement rates are key!
STEP 10
Make sure SPF record is set up (DKIM and DMARC are also useful)
STEP 11
Remove domains/IP addresses from any blacklists
STEP 12
BE PATIENT!

Social selling: LinkedIn

Social media is another major outbound prospecting channel. In B2B/SaaS, LinkedIn is the platform to focus on. ***Gabrielle Doughty,*** *Senior Business Development Executive at Cognism, shares her guide to LinkedIn prospecting.*

LinkedIn is the world's foremost social network for business.

At last count, the platform boasted **660 million users working at 30 million companies.** Of those 660 million users, 90 million are senior-level influencers, with a further 63 million identified as being in decision-making roles.

Last year, it was calculated that 80% of B2B leads were sourced via LinkedIn. Cognism's own outbound sales team has found great success using LinkedIn - so far this year, 39% of their meetings booked have come from the social network.

It's clear then, that if you're an outbound prospector, LinkedIn is a channel you simply must be on! With LinkedIn, you have a highly receptive audience of potential buyers - most of whom are looking to expand their professional networks and share their knowledge.

But how can you maximise LinkedIn and use it to your advantage? What are the steps you need to take to turn a social network into a selling network?

We spoke to Gabrielle "Gabby" Doughty, Cognism's Senior Business Development Executive. She works for the Salesforce pod in our outbound sales team, tasked with finding prospects and pitching our **Salesforce app.**

Gabby gave us the steps she takes to prospect effectively on LinkedIn - steps which will help you transform LinkedIn into a **B2B lead generation** powerhouse!

1. Know your prospects

Gabby's first step is to always know who your prospects are. If you don't know who you're looking for, how will you find them?

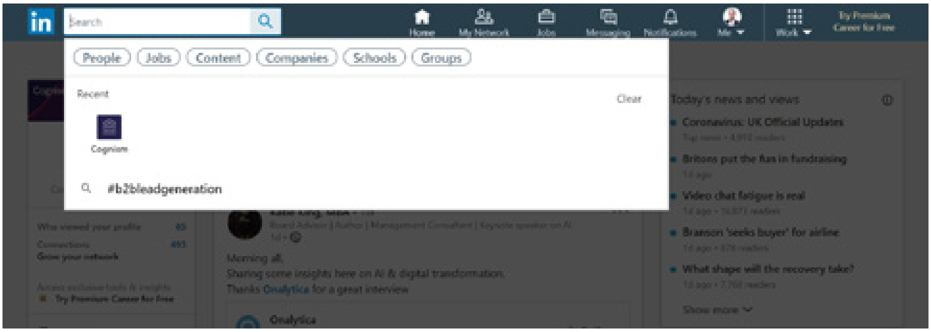
Start by consulting your Ideal Customer Profile (ICP). It will tell you...

Who your perfect customers are.	Where they work.	What their job titles are.	What industries they work in.

Referring to your ICP will help you out massively when it comes to outbound prospecting on LinkedIn.

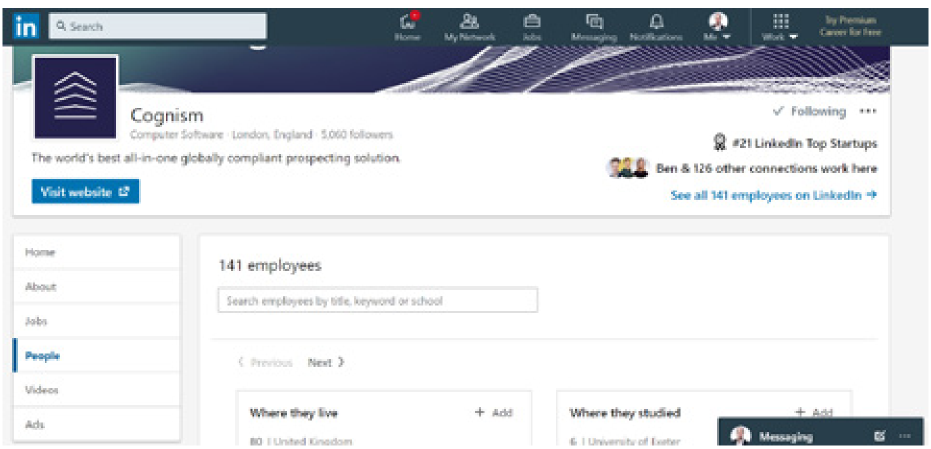
2. Find your prospects

Once you have your ICP locked down, you can start searching for people and companies on LinkedIn! Simply click on the Search bar in the top left corner. LinkedIn gives you the option to search for People, Jobs, Content, Companies, Schools and Groups.



Let's say that, after running a search, you find a company that fits your ICP. All you need to do to find the decision-makers in that company is:

Click on the company's profile. → Navigate to the menu on the left-hand side. → Click on "People".



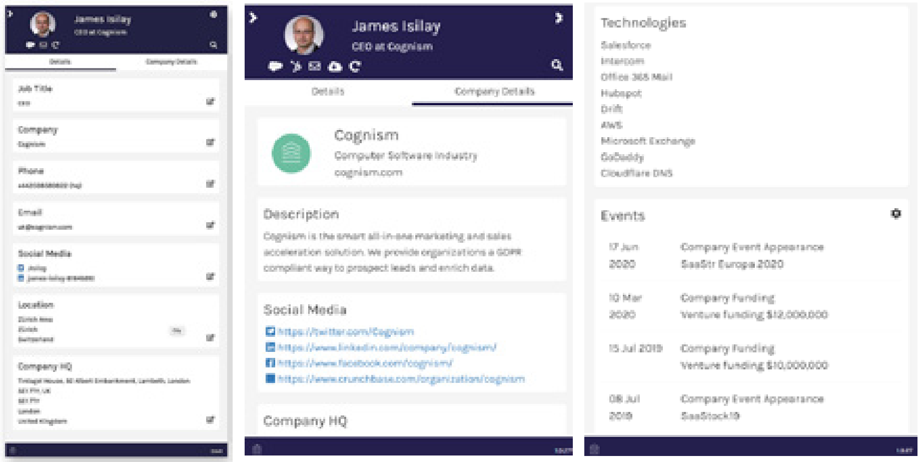
After clicking on "People", scroll down. You'll see a list of all the employees in that company.

Now, you have a couple of options. You can either connect with the people who look most relevant to you and get a conversation going on LinkedIn - or, as Gabby recommends, you can take a shortcut!

The **Cognism Chrome Extension** is a very useful tool that we developed specifically for LinkedIn prospecting! Simply install the extension to your Google Chrome browser, go to any

LinkedIn profile and click the Cognism ident...and hey presto!

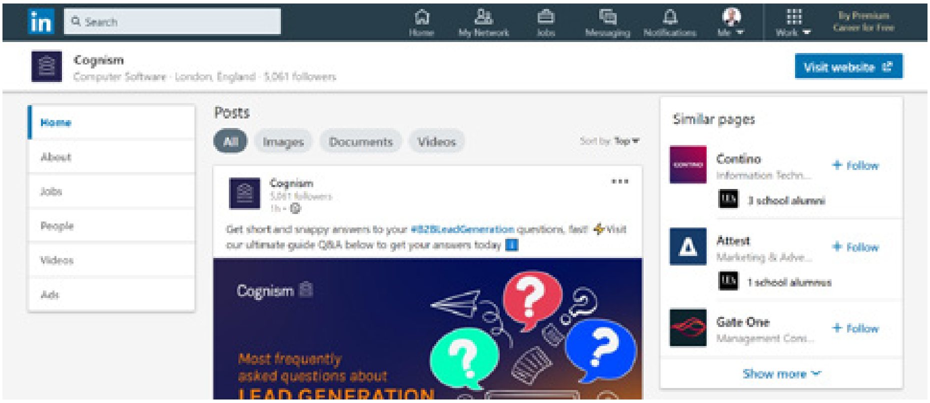
A tab will open up showing the prospect's job title, company, business phone number and email address - plus event-based data such as recent appearances and funding rounds.



The Cognism Chrome Extension is a great tool if you want to bypass the following steps and go straight for an email or phone call.

However, with that said, the following steps will help you to "warm up" your cold LinkedIn prospects, meaning that your emails or phone calls will be more successful further down the line.

Another good tip for finding prospects that Gabby shared with us is to go on a company profile and click on "Similar pages" (right-hand side of the company's posts feed):



This will give you a list of similar companies that you can prospect to. Just repeat the steps described above for each one!

3. Message your prospects

Now you've found your prospects, it's time to start engaging with them!

Gabby's advice is to create a process around this. Block out time in your calendar to do nothing else but send LinkedIn messages!

Gabby recommends an hour in the morning to send connection notes and then another hour in the afternoon to write any follow-ups. Make sure you stick to these times - don't let anything distract you!

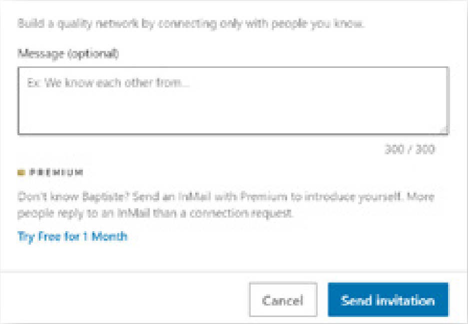
You could go further by creating an Excel sheet or Google doc to track your LinkedIn messaging. Include your prospects' names, when you sent your first message, whether their response was positive or negative, and when you sent your follow-ups.

Again, this will help you to build a system around your LinkedIn prospecting. It can be easy to forget who you've sent messages to, and when!

If you have an outbound cadencing tool, you'll be able to add these LinkedIn steps into your prospecting workflow. It's a great way of ensuring that you're prospecting to people across multiple channels. You can also keep track of all your activity and outstanding tasks in one place.

The connection note

The first message you send to a prospect is also called the connection note. This is the box that opens up when you click the blue "Connect" button on a LinkedIn profile:



As you can see, LinkedIn gives you 300 characters to write your connection note.

It doesn't sound like much - but with a connection note, the intention isn't to pitch your product straight away - it's to drum up some interest and get a conversation started.

Here are Gabby's tips for writing a successful connection note:

- **Personalise your message –** it mustn't read like a copy-and-paste. It must make the prospect feel as if they're the only person you've contacted today. Make them feel special!

- **Be short and concise -** you've only got 300 characters; don't waste them!
- **Create a sense of intrigue -** don't reveal everything about your product or service - just enough to whet the prospect's appetite!

Here's an example connection note which Gabby has used before:

Gabrielle Doughty

Gabrielle Doughty

Hi [first name],

I would be curious to know if you're open to new tech that would accelerate [company name]'s business development process?

If you're looking to acquire more clients, I'd be interested to chat. If not, I'm happy just to connect.

Best,

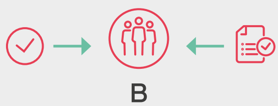
Gabby

Another top tip from Gabby is to A/B test your connection notes. Here's how to do it:

If you have some prospects who are the same seniority or work in the same industry, split them into 2 groups - Group A and Group B.

Track this on an Excel sheet/Google doc.

Compose 2 different connection notes. Send one note to Group A and the other note to Group B.



If you get more positive responses from Group B, then you know to start using that connection note going forward.

The follow-up message

Assuming the prospect connects with you/sends you a positive response, you can block out some time to send a second message. This is called the follow-up.

With the follow-up, you can steer the conversation towards the benefits of your product. Demonstrate to the prospect how it will make their life easier.

If you can, name-drop some customers of yours - but only if there's something that links them to the prospect. The same industry, for example, or the same geographical location. You have an unlimited word count available now, so feel free to get creative!

Gabby shared an example follow-up message with us:

Gabrielle Doughty

Gabrielle Doughty

Hi [first name],

Thanks for connecting!

Cognism's solution can help [company name] find your ideal customers, save prospecting time and grow your client base. We are helping similar companies in your space, including [company name] and [company name].

I appreciate you must be busy but it'd be great to open a conversation with you!

Do you have 15 minutes for a video call on [time/date]? Please let me know.

Best,

Gabby

It's important to end your follow-up message with a strong CTA. As ever in B2B sales, the goal is to get a response, whether positive or negative. "No" is better than nothing!

If the prospect responds positively - great! If not - qualify them out and move onto the next one. Don't let rejection stop your flow.

But what happens if you don't hear anything from your prospect? Give it some time - a day or 2 - and then send a reminder. Like this:

Gabrielle Doughty

Gabrielle Doughty

Hi [first name],

I understand you must be busy, but I just wanted to see whether you had considered my last message?

Best,

Gabby

9 times out of 10, the reason why a LinkedIn prospect doesn't reply is that they're (like the rest of us!) busy with their day job. So keep your reminder message short and sweet - it might be just the nudge they need to get in touch.

4. More LinkedIn tips

Gabby gave us some other useful tips for outbound prospecting on LinkedIn:

- If someone in your network joins a new job, hit the congratulations button! This gives you the chance to pitch again.
- If someone views your profile, connect with them straight away and send a message. These prospects are warm - they're actively looking for you and your product!
- Good housekeeping - make sure your LinkedIn profile looks professional. Update your bio and include an appropriate photograph. Utilise the banner space - sales reps at Cognism have their email addresses and phone numbers on their banners.
- You can create search alerts for funding rounds and new job joins - doing this is a great way to save yourself valuable prospecting time.
- Connect with thought leaders in your target industries (typically these are people who will have 500+ followers). You can search through their connections to find more prospects.
- Follow hashtags for relevant topics (Gabby follows the #salesforce hashtag). Check the hashtag every day and see who is commenting or asking questions. Start commenting yourself and open up some conversations!
- Join some LinkedIn groups. Gabby has joined a few Salesforce groups, where she regularly comments and answers questions. These can be great channels for some creative outreach.

Outbound prospecting on LinkedIn: does it work?

LinkedIn prospecting isn't an exact science - sometimes it can take a while to break through to a prospect, other times it can generate some very quick wins. But hopefully our outbound prospecting guide for LinkedIn will help you to make the most of this vital sales channel.

The most important thing is to create a repeatable system for your LinkedIn prospecting. Follow Gabby's steps and dedicate a portion of your day to it.

Gabby had one last insight to share with us:

> *"I called one prospect 12 times, but I never managed to get through to him, always to the gatekeeper. I gave up calling and instead tried connecting with him on LinkedIn. All it took was one LinkedIn message to book a meeting!"*

If that doesn't demonstrate the power of LinkedIn, we don't know what will! There's no time like the present, so start outbound prospecting on LinkedIn today. Good luck!

Sales cadence: the ultimate outbound prospecting cadence

Cognism's Inside Sales Director, ***David Bentham,*** *presents the outbound prospecting cadence as used by our sales team and which broke company records! Read on to see the full cadence and David's commentary.*

This year, the coronavirus crisis has impacted every area of life, and B2B sales is no exception. With the global economy faltering, many companies are struggling to find new customers and grow their revenue.

However, a decline in your sales isn't inevitable. At Cognism, we've always spoken about "the science of B2B sales" - that if you apply a rigorous, structured process, you can achieve much more than you ever thought possible.

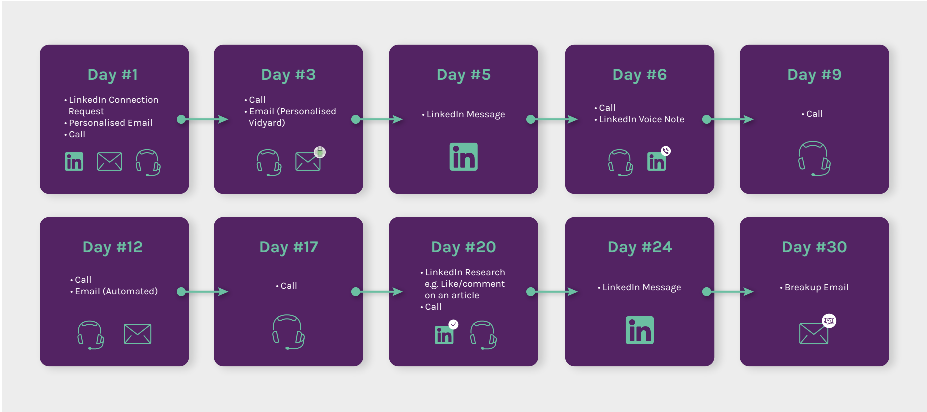
When the pandemic struck, we reviewed every one of our **B2B prospecting** processes. We asked ourselves some questions: what could we learn? What could we improve? What could we do differently?

One of the key aspects we looked at was the cadence used by our sales team. In this new era for sales, it was clear it needed a refresh. Through a meticulous process of A/B testing, we arrived at a cadence that was perfectly designed to maximise engagement and deliver results.

Here are the outcomes the cadence produced for our sales team:

- Since they started using this cadence, there has been a 20% increase in meetings booked.
- Last month (April 2020), they broke our company record for the number of meetings booked in a single month.
- They hit their original planned revenue target, finishing at 103% of the bookings target.

And here is an overview of the cadence:



The ultimate outbound prospecting cadence explained

We asked David Bentham, our Inside Sales Director, for his comments on the cadence. He walked us through every step of the cadence and why it's been so successful for our SDRs.

Strap yourselves in for some actionable insights into the ultimate outbound prospecting cadence!

The purpose of the cadence

DAVID:

"With this cadence, we were going for a multi-touch approach."

"Most people are working from home now, so it's become much harder to reach them just by cold calling. Also, a lot of people aren't comfortable speaking to cold callers at the best of times."

"You want to engage with prospects on their preferred medium, whether that be the phone, email, video or LinkedIn. That underpinned our thinking when we were testing the cadence."

DAY #1 - Linkedin connection message

The cadence begins with a simple LinkedIn connection message. Here's one provided by **Charlie Humphrey,** Senior Business Development Executive.

Charlie Humphrey ··· ✕

Charlie Humphrey

Hi [first name],

It would be great to add you to my network. I specifically work with [target industry] companies to help them save prospecting time and grow their client base with high-quality business data.

Connect to find out more.

Best,

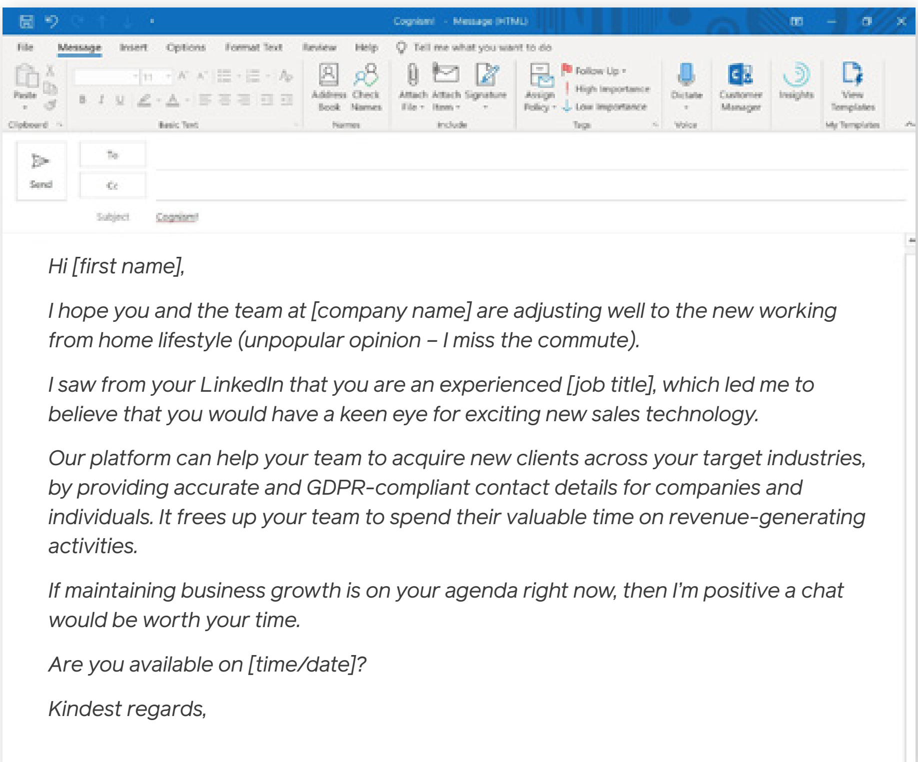
Why does the cadence begin with a LinkedIn connection request? David Bentham explains:

DAVID:

"The reason for this is once you've connected with the prospect, you can get access to their personal information, including their mobile phone number. This makes the later cold calling steps much easier. As everyone is working remotely, office direct dials are much less effective."

DAY #1 – Personalised email

On the same day, the LinkedIn connection request is followed by a personalised email. Here's an example from **Tom Gyngell,** a Senior Business Development Executive.



Hi [first name],

I hope you and the team at [company name] are adjusting well to the new working from home lifestyle (unpopular opinion – I miss the commute).

I saw from your LinkedIn that you are an experienced [job title], which led me to believe that you would have a keen eye for exciting new sales technology.

Our platform can help your team to acquire new clients across your target industries, by providing accurate and GDPR-compliant contact details for companies and individuals. It frees up your team to spend their valuable time on revenue-generating activities.

If maintaining business growth is on your agenda right now, then I'm positive a chat would be worth your time.

Are you available on [time/date]?

Kindest regards,

David shared his thoughts on the importance of personalisation:

DAVID:

"Every channel open to salespeople is very competitive right now. Everyone is sending emails and LinkedIn messages, all day every day! Personalisation is how you stand out in a competitive landscape."

"Don't be afraid to bring in some humour or anything that'll help you get a conversation going. Be different from everyone else. Acknowledge the times we're living in and always show empathy to your prospects. You never know what they're going through."

DAY #1 – Call

If the LinkedIn connection was a success and you've got the prospect's phone number, you can also try calling them on Day 1.

David had this to say about the cadence and **cold calling:**

DAVID:

"50% of the cadence is using the phone. We reduced the amount of cold calling for this cadence because we found that our connect rate had gone from 10% to 4%. However, there's still logic in calling - it just has to be done in a more strategic way."

"Again, the idea is to reach the prospect on multiple different channels. Cold calling is just one way to reach people - and things like email, LinkedIn and video prospecting are now more popular."

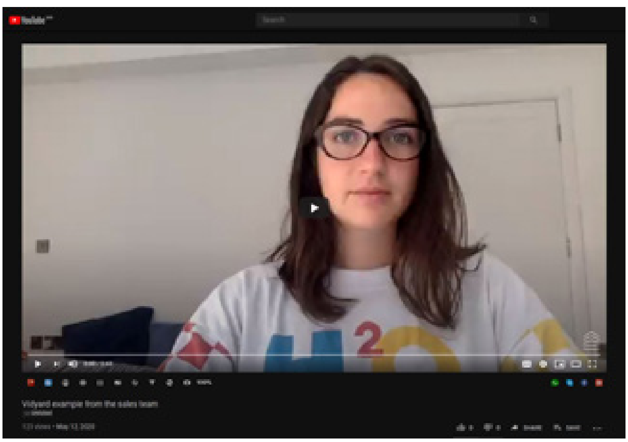
DAY #3 - Personalised email with Vidyard

On the third day, our SDRs follow up with a personalised email, including a **Vidyard** video message.

Rachel Goldstone, Business Development Representative, uses this messaging:

Hey [first name],

Working from home can be very monotonous, so I thought I'd try and shake it up a bit with a video! It would be great to learn more about your new normal in terms of workflow and outreach and explore how our tool can help.



If you are open to new technologies that will enhance the business development process at [company name], let's catch up this week.

If it isn't relevant to you, I'm really open to some feedback as this is one of my first attempts!

Would you be open to a conversation tomorrow?

Best,

What's the reasoning behind including a Vidyard video message? David said:

DAVID:

"A video message is another great way of breaking through the noise. It adds an extra layer of personalisation to an email. The prospect can see that you've gone the extra mile to get their attention."

"At Cognism, we encourage our SDRs to do anything that'll make the prospect sit up and take notice. A video can be a very immediate and effective route to achieving that."

DAY #6 - Linkedin voice note

One innovation that David was keen to highlight in this cadence was the use of LinkedIn voice notes. It's become a key plank for LinkedIn prospecting at Cognism.

DAVID:

"On the sixth day, we recommend that our SDRs send their prospects a LinkedIn voice note. The reason for this is that we saw response rates increase by 50% after a voice note."

"Just like a Vidyard, a voice note can be a very powerful spur to beginning a conversation. People feel a lot more connected when they hear another person's voice - especially in these socially-distanced times!"

DAY #9 - Call

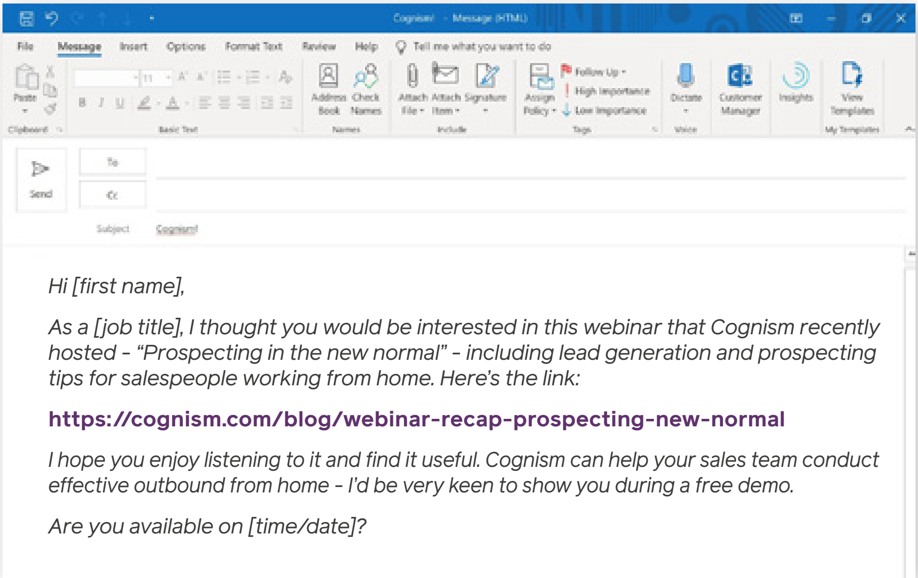
David had some cold calling advice to share:

DAVID:

"When you're sending Vidyards and LinkedIn voice notes, don't give up on the phone! It's still a great driver for engaging and making a sale. Always make sure it's at the heart of your cadence. At Cognism, we've seen connect rates of up to 80% on mobile phone direct dials."

DAY #12 – Personalised email

Here's an example email from this point in the cadence – supplied by **Catherine Gardner,** Sales Team Manager.



Hi [first name],

As a [job title], I thought you would be interested in this webinar that Cognism recently hosted – "Prospecting in the new normal" – including lead generation and prospecting tips for salespeople working from home. Here's the link:

https://cognism.com/blog/webinar-recap-prospecting-new-normal

I hope you enjoy listening to it and find it useful. Cognism can help your sales team conduct effective outbound from home – I'd be very keen to show you during a free demo.

Are you available on [time/date]?

David relayed to us the thinking behind an email like this.

DAVID:

"We tell our sales reps to stand out and be creative in the communications they send. No generic messages! Thankfully, the marketing team at Cognism regularly produces content that's relevant to our target prospects."

"So we encourage our salespeople to share content! Why do we do this? It shows that they're enthusiastic, interested and genuine about deepening a business relationship. It can be anything – a blog, a webinar, a case study, a whitepaper – but it has to be pertinent to the prospect and their company or industry."

"If you can demonstrate a willingness to add value to the prospect, then they're much more likely to give you a second look."

DAY #20 - LinkedIn research (e.g. like/comment on an article)

At this point in the cadence, if you haven't had any success, it's important not to give up. One thing that can help is to click onto the prospect's LinkedIn profile. Have they posted anything recently or shared an article?

If so, be sure to add your own comment! Over to David for his thoughts on this:

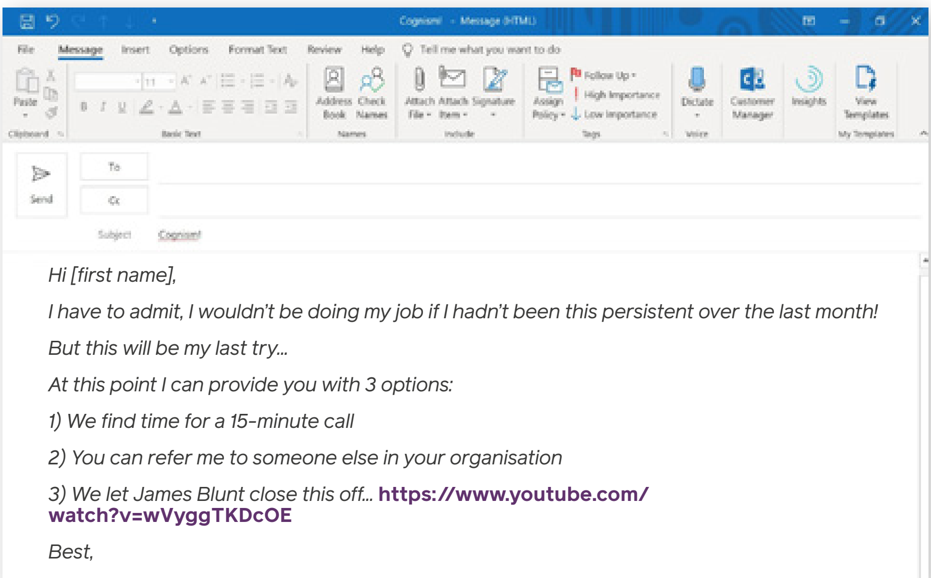
DAVID:

"Sales is a numbers game. The more connections you make, the greater chance you have of achieving success. Our cadence is designed to maximise the touchpoints you have with a prospect and keep the engagement up."

"Something like commenting on a LinkedIn article - it may sound simple or pointless, but it can really work in getting a prospect to engage with you. Especially so if the prospect is a frequent LinkedIn user."

DAY #30 - Breakup email

By the thirtieth day, if you haven't got anywhere, it's time to send the breakup email. Here's another example from Tom Gyngell:



We asked David for his tips on crafting a great breakup email.

DAVID:

"Writing breakup emails can be hard, but the trick is for it not to be a 100% clean break. Always see if you can get the prospect to refer you onto to someone else in their business. There's no harm in asking!"

"It's also good to try and get a definitive answer either way – is the prospect interested or not? The worst answer you can get in sales is 'maybe'. If the prospect replies saying they've no interest, then you can qualify them out and move on."

Sales demos: discovery calls 101

Conducting sales demos is the last stage in the outbound prospecting process. But before you can get there, you need to discover more about your prospects. **Jonathon Ilett,** *Cognism Sales Director, explains.*

Why are discovery calls important?

86% of B2B buyers say they see "no real difference between suppliers". With so much choice available to customers, it's more important than ever for salespeople to make a genuine connection with prospects and clearly display how their product can help change their lives.

Discovery calls are your route to achieving this.

What are discovery calls?

A discovery call is a step in the **B2B prospecting** process. It's the first call after connecting with a prospect through **cold calling.**

A good discovery call sets the relationship between the salesperson and the prospect. It determines whether or not the product the salesperson is selling is a good fit for the buyer.

5 steps for making successful discovery calls

1. Do your research

As always in the task of **B2B lead generation,** preparation makes perfect. Before you pick up the phone to make your discovery call, you must do your research! Follow these steps:

- Visit the prospect's LinkedIn page and their company's LinkedIn page.
- Double-check that the information you have on them is correct.
- Take a look at the company's website. Make notes on anything useful you find, such as their location, the technology they use and the types of customers they have.

You'll need all this intel when the prospect answers your call!

JONATHONS'S TOP TIP:

"Research is absolutely critical to good discovery. You don't want to waste time or appear unprepared by asking questions when the answers are readily available online. Also, if you can show the prospect that you've taken the time to research their business thoroughly, that will go a long way to establishing trust."

2. Identify goals

When your discovery call starts, the first thing you need to do is identify goals. These are:

- The short-term and long-term goals of the company.
- The prospect's individual goals.
- Ask the prospect questions that reveal this information. Their answers will be your basis for further discovery. Keep them in your mind as the call progresses. How will your product help the prospect and their company achieve these goals?

JONATHONS'S TOP TIP:

"It's important to be precise. Focus on metrics and get percentages if possible. Establish quantity. For example, you can ask a question like: how much are you looking to increase your net new bookings? Then you can tie the prospect's answers to the results that your product can deliver."

3. Identify pain points

The prospect has investigated your company because they have business challenges they want to overcome. For some, the pain they're feeling may be hard to define. It's the salesperson's role during the discovery call to explain their pain!

The best way of doing this is to ask open-ended questions about the prospect and their business. Get the prospect talking more and they'll soon realise what their own pain points are.

Here are some examples:

- ☑ What prompted you to explore our solution?
- ☑ What's the biggest challenge you're facing right now?
- ☑ What's prevented you from relieving this pain?
- ☑ What would happen if you did nothing about it?
- ☑ How important is it to you to solve this quickly?

JONATHONS'S TOP TIP:

"Identify 2-3 pain points that the prospect is experiencing. Check with them afterwards if you've understood correctly. My advice is to focus on the prospect's tech stack - chances are, there's a gap there that your product can fill."

4. Tie it all together

Take the 2-3 pain points you've unearthed and connect them to a specific feature of your product. Now, this gives you a shortlist of features you can explain to the prospect.

Show them how the features will produce benefits - linking the benefits to the B2B sales goals from point #1. Tying everything together in this way will help you build up a strong business case.

JONATHONS'S TOP TIP:

"Don't go through every one of your product's features. The prospect is only interested in the parts that are relevant to them and their business."

5. Recap and reaffirm

At the end of each stage of your discovery call, repeat what you've learned back to the prospect. Ask them if what you've discovered is correct. It's far from a pointless exercise - doing this means that they might divulge even more information that will help you!

JONATHONS'S TOP TIP:

"When your discovery call comes to an end, recommend the next step but let the prospect decide. It could be a follow-up email or going straight into booking a product demo. Always set exact timings for whatever the next step will be."

Jonathon's bonus tip

JONATHONS'S TOP TIP:

"My final tip is to build rapport! Easier said than done - but here are some tactics you can use."

"Don't launch into your sales patter/product reel straight away. Take some time at the start of your discovery call for "small talk" - get the prospect relaxed and comfortable talking to you. Doing this means they'll be more likely to share with you as the call goes on."

"If you're conducting the call online (which is likely considering recent global events!) - always make sure the video is on! Being able to see each other will help you build rapport much quicker."

How to conduct the perfect B2B sales demo

Alexander Shorthose *is a Senior Business Development Manager for Cognism's US branch. In this article, he demonstrates how a well-structured sales demo can convert a prospect into a customer.*

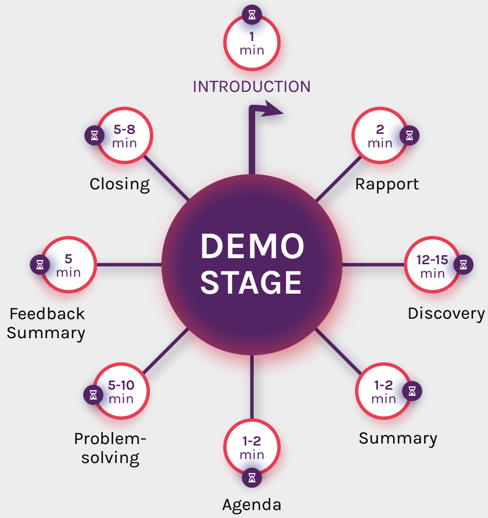
I'm often asked how to conduct the perfect B2B sales demo. In my experience, the best way to increase your chances of success and maximise conversions is to apply a rigorous process.

Here are my guidelines for planning and conducting a winning sales demo.

How to structure your B2B sales demo

Most demos last between 30 and 45 minutes. That means you have to structure your demo and keep an eye on the clock. You don't want to run out of time before you get to the most essential parts.

This is how I structure a demo, weaving each section together to create a single narrative.



Of course, the narrative is that your product is the solution to what keeps your prospect up at night.

The sections of a B2B sales demo

1. Introduction and Rapport

While the introduction and rapport sections should be short and sweet, they are still important. While you want to focus on getting to the next stage quickly, you need to build your narrative straight from the kick-off. It's not about making a sale; it's about selling a future state.

Before you start your demo, spend time researching your B2B prospect. Use what you find out about them to build rapport (have they recently won an award, for example, or been featured in an industry publication?).

Build trust by asking relevant questions. Don't under-share or overshare, just be your usual, professional self. Repetition can help you here; when you repeat someone's words back to them, you build greater rapport.

TOP TIP:

On a demo, you should ideally be speaking for 40% of the time, while the prospect speaks for 60%. If you're having difficulty getting your prospect to speak, don't be afraid to use pauses! They're a great technique for getting the prospect to talk more. Nobody likes dead air!

2. Discovery

The discovery section is where deals are won or lost. In this section, you have to discover the prospect's pain points in order to position your product as the solution.

This is also the part where you want to qualify out your prospect. Don't waste time trying to sell to someone who will never buy from you.

It doesn't matter which sales methodology you use in your company (e.g. BANT, Challenger, MEDDIC), the aim is the same. Have a conversation with your prospect where they tell you what's making their working life difficult.

Focus on 3 or 4 problems your prospect may be facing. Too few and your prospect won't believe that you care; too many and you'll lose focus on your priorities.

TOP TIP:

Continue to build rapport by asking engaging questions throughout the discovery section. Don't frontload your questions though, or it will feel like you're ticking boxes on a checklist. Keep it conversational and ask 11-14 questions max. It's not an interrogation!

3. Summary

Use this section to demonstrate that you were listening to the prospect's concerns. You have to show that you understand their pain points.

TOP TIP:

Repeat the prospect's pain points back to them and ask them if you have it right. Doing this is a great method for building credibility and trust.

4. Agenda

With this section, set a flow or expectation of what you intend to discuss next. Tell the prospect the features that you would like to show them - but allow them the chance to add to the agenda, if they wish.

5. Problem-solving

After you've set the agenda for what you're going to do next, it's time for the problem-solving section of your demo. This is the part where you make your prospect realize that your product is the answer to all the issues they laid out for you earlier.

Share the features of your product, but keep relating it back to what they told you in the discovery section. Make the prospect understand the value of your product, not just what it does.

Give examples of how you have helped customers with similar problems (the customers you mention must be in the same industry as they are, though - everything you quote must be hyper-relevant to the prospect).

Don't talk about features that aren't relevant to your prospect's situation, however great you think they are. Only share what your prospect wants to see.

TOP TIP:

'Temperature check' regularly! Check that your prospect is following you and is fully engaged. Give them the space to raise objections if they want to. Objections aren't a bad thing; on the contrary, they're a sign that the prospect is taking your product seriously!

6. Feedback summary

Give the prospect the time to offer feedback and raise more objections, if they feel it's necessary. Ask them if they see the value in your product. Do they understand why they should be using it?

TOP TIP:

Grant the prospect a chance to bring up their likes and dislikes of your offering. Then, you can go back to problem-solving, handling all the prospect's objections until none remain.

7. Closing

Next is the closing section. Firstly, challenge the prospect's objections, but avoid a monologue. I call this 'peeling the onion' - discovering the root cause of their objection. Directly address concerns and provide answers.

Only once you have demonstrated the value of your product should you talk about price. Any earlier and you run the risk of your prospect seeing only a dollar sign, not a worthwhile investment.

Now comes the time when you agree to the next steps. Ask your prospect what they want to do next. Give them control. Make sure there is a time scheduled in the diary to talk again.

TOP TIP:

If there are other stakeholders involved in the decision, and other hoops (legal, IT or procurement etc.), you must talk about them at this point. But above all, get them excited. Make them look forward to using your product. After all, you've just shown them how it will make their problems disappear!

8. The follow-up

Congratulations! You just delivered a perfect B2B sales demo. But it's not quite over yet...

Once you have said your goodbyes, your next task is to compose a follow-up email that documents everything you have talked about, carrying on the narrative that they can't wait to use your product. Here's what you need to say:

- How much you enjoyed showing them your product.
- The key points of what you talked about (if possible, include a recording of your demo).
- Clear and concise next steps.
- Include any extra information at the end.

TOP TIP:

Imagine every email you send is going to be sent on to somebody else. Chances are, it will - on average, there are **7 people involved in any B2B buying decision!**

So your follow-up email must be clear, detailed, well-thought-out and professionally written (no grammar errors or typos!).

Admin: the unsung hero of closing sales

Cognism

If your admin game isn't strong, you'll lose out on sales opportunities. **Bradley Davies,** *Cognism's Business Development Manager, has some top tips for managing sales admin.*

In Cognism's sales team, Bradley Davies is known as the "king of admin"!

His diligence and dedication to sales admin has helped him to achieve some truly impressive outbound prospecting results. For the past 2 months running, Bradley has won Cognism's "Deal of the Month" award, bringing in deals with a combined value of $2.5k MRR.

Bradley attributes a good deal of his B2B sales success to good admin. He told us:

"For me, admin is the most overlooked sales skill. If your admin game isn't strong, you will lose out on opportunities. It's as simple as that!"

We asked Bradley for his top tips on managing sales admin. If you're struggling to master this essential B2B sales skill, then all you need to do is read on!

1. Preparation makes perfect

BRADLEY:

"A lot of salespeople make the mistake of thinking that admin is something you do after a sale, not before," Bradley said. "But good, structured admin can help you out massively with your cold calls or demos. The better prepared you are, the more likely it is that the prospect will buy."

Here's Bradley's system for preparation admin:

Before a demo or cold call, list out in your notebook (every B2B sales rep should have one!) 5 key things you'll want to explore with the prospect. These examples are specific to Cognism's offering - but you can adapt them to your needs:

Motivation	Why is the prospect interested in your product/service?
Data	Are there any specific data-points that the prospect wants to target?
Tech	What does the prospect's tech stack look like?
Team Size	How large is the prospect's team?
Pain Points	What challenges does the prospect want to solve - and how does your product solve them?

Bradley populates this info before his B2B sales demo, using the notes provided by the SDR and his own LinkedIn research. He'll do this 15 minutes before the meeting in **black** pen.

Then, when the demo commences and he speaks to the prospect, he'll update the information using a **blue** pen. This is an easy way to keep track of your own notes vs. what the prospect actually tells you. Cost-effective, too - all you need is a black and a blue pen!

2. Structure your day

It's vital to make admin part of your daily routine. Bradley recommends blocking out time on your calendar each day for admin.

Here's one of Bradley's tips:

BRADLEY:

"Instead of blocking out hour-long chunks every day, break your admin time down into more manageable chunks. After every meeting, put a 30-minute buffer into your diary. If the meeting runs over, then you won't be late for the next one - and if it doesn't, then you've got a good half-hour to do your admin!"

3. Timing is key

Bradley had this to say about the importance of sales admin:

BRADLEY:

"If you're an SDR making 50 calls a day, that'll add up to 250 calls in a given week. You'll be talking to so many people per day, you simply won't remember all the details of every call. Timely admin is how you manage this workload."

Bradley's advice is to do your admin as soon as possible after every call or demo. Here's the process:

- Take notes during your call or demo. If you don't, you will forget!
- Format your notes immediately after the call or demo ends. Include key points on the prospect, their company and what rapport was like during the meeting (see our demo notes template below).
- Schedule the next steps in your CRM (e.g.: if you have to provide a document to the prospect by a certain date). If you agreed a follow-up meeting with the prospect, send the invite straight away. Cognism's mantra is "if it isn't in the CRM, it doesn't exist!"

Here is the demo notes template used by Cognism's SDRs after every cold call. Again, you can edit this to match your requirements:

Company overview	Brief description of the prospect's company, its industry and size.
Ideal customer profile	The industries and job titles that the prospect's company targets.
Current process	How the prospect's company generates new business.
Tech stack	The main tools used by the prospect's team.
Key hook	What are they looking to get out of using the product?
Rapport	Personalised notes/information that could be useful in follow-ups.

4. Build an admin pipeline

When you get the process right, you can build a strong sales pipeline out of your admin. Bradley explained this to us:

BRADLEY:

"Let's say you're speaking to a prospect and they say, 'call me back in 6 months.' My advice is to always take them at their word! Schedule a notification in your calendar to call them back in exactly 6 months' time."

"Doing this creates a 'soft intro' for you when you do call them back. Chances are, the prospect will remember you. Even if they don't, they'll appreciate that you went to the effort to contact them again. I've found this approach often leads to a meeting."

"Using this system, you can build a really strong pipeline based on admin. If you have 20-30 Outlook notifications per week, those are 20-30 'warm leads' who already know you and your company. You can see how powerful admin can be to helping you close deals, even more so than cold calling!"

FINAL THOUGHT

Bradley shared some last words of admin wisdom with us:

“While it’s important to get a smooth admin process going, don’t be too rigid with it. Admin is there to power innovation, not stifle it. Use the steps I’ve outlined above to get your admin system started, then optimise and refine as you need.”

Ghosted? How to reactivate your closed-lost deals

What can you do when a good prospect turns into a ghost? Find out how to bring your closed-lost deals back to life with Cognism's guide to ghosting!

GHOSTING (NOUN)

"The practice of ending a personal relationship with someone by suddenly and without explanation withdrawing from all communication."

It happens so often in outbound prospecting. You've built up good rapport with a prospect, you've shown them a killer sales demo, and then...nothing! They don't answer your calls, they don't respond to your emails. What do you do next?

We asked Cognism's sales team for their advice on what to do when you've been ghosted. Our colleagues **Bradley Davies** and **Charlie Beale** gave us their top tactics for getting back on your prospect's radar and bringing your closed-lost deals back to life.

1. Don't forget about the ghost!

The most important aspect of keeping closed-lost opps engaged is also the simplest: don't forget about them!

Even if you know nothing can be done for 6 months in terms of exchange of services, set regular reminders to either:

- Send them relevant, useful content.
- Simply check-in with them personally! Ask them non-work-related questions. Ask them how their real-life is going. This is especially important during the challenging times we're all living through.

You'll find that following these steps will make the actual business re-engagement much easier. Earn the ghost's respect and trust, keep building rapport, and they will be much more open to giving your product a second look.

2. Try many touchpoints

Engage with the ghost using as many different types of touchpoints as possible. Don't just call or email - send them LinkedIn messages, videos or even handwritten notes!

A good tip is to look at how the SDR initially got in touch with the ghost. If the SDR booked a meeting with the ghost from LinkedIn prospecting, say, then you can focus your energy more on this avenue.

Beyond that, don't shy away from the phone! Every SDR knows the worth of cold calling. It's still the best method for sparking up conversations with prospects. Chances are if you've spoken before, you have their mobile number too.

3. Be a LinkedIn champion

In outbound prospecting, LinkedIn is the social network you have to focus on. If your ghost is on LinkedIn and using it every day, then you should be, too!

Regular LinkedIn messages and/or voice notes are great ways to keep on people's radar. Keep an eye on their LinkedIn activity, as well. If the ghost posts some great content, for example, have a read and send them your feedback.

This is all good for building rapport and keeping the conversation going - you're taking time out of your day to engage with them!

4. Be unconventional

Cognism's sales team often deploys some unusual techniques to win their ghosts around. Physical, rather than digital, engagement can produce some great results. Our BDMs use **Reachdesk** to send personalised gifts and direct mail to prospects, clients - and ghosts!

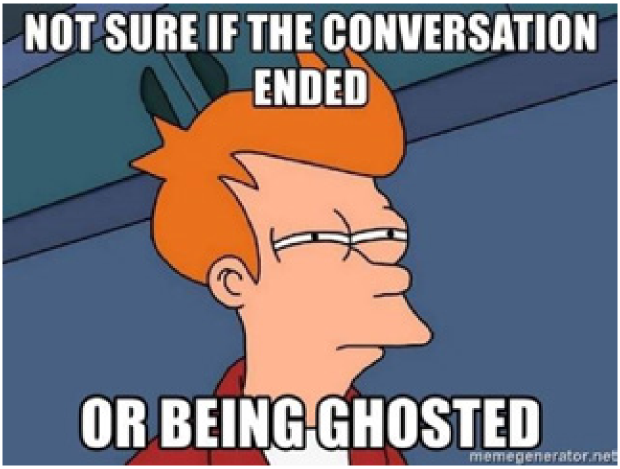
One example quoted by Charlie Beale is to send food vouchers via Reachdesk. It's a good means of dropping in with ghosts and quickly striking up a dialogue.

5. Meme up!

Memes! Everybody loves them, right? They're not just pointless distractions, they can actually do a world of good in getting ghosts to engage.

Cognism BDM **Saif Khan** has made memes part of his weekly routine. Every Friday, he sends memes to his open and closed opps. He's seen great engagement from doing this. If you can make someone laugh, they'll be much more likely to send you a reply...and getting a reply is the first step in reviving a closed-lost ghost!

Alternatively, you can take the other route and play on the prospect's heart-strings. Remind them that you made time for them and it's just good manners for them to reply.



6. Use data to your advantage

Tom Spanswick is an AE at **BrightEdge,** the leading SEO and content performance solution. He shared with us a great tip to keep ghosts engaged. It's a very simple process of using **B2B data** to your advantage.

Tom screenshots **Google Trends** data and sends it to prospects. The reasoning behind this is to show them that there's still a requirement for their product, as it's being searched 'x' times.

This tactic can't be used in every instance - it very much depends on the prospect's product or service - but it does show the value of thinking outside the box to reactivate your closed-lost deals.

What if nothing works?

When trying to engage with ghosts, always remember that people are busy and may not reply the first or even the second time. Keep trying until you're confident they're not coming back. Then try again one last time! Persistence often pays off in outbound prospecting.

There are other things you can do if you're finding that all your efforts are going to waste. Try contacting other stakeholders in the ghost's business to see if they've spoken about you, or if they're ill/on annual leave.

We asked Charlie and Bradley for their final thoughts on what to do when you reach the end of the line.

CHARLIE BEALE:

"If you do give up on the deal, always ask for feedback on what you could've done better. That could be just the thing that gets the prospect to start talking again!"

BRADLEY DAVIES:

"In the worst-case scenario, close-lose but then get back in touch 2-3 months later. Keep an eye on their LinkedIn profile and news articles for anything that might be relevant. Never totally give up on a good deal!"

Conclusion

We hope you enjoyed, and got value from, our outbound prospecting playbook. We'd like to thank all our contributors for sharing their knowledge.

Our final piece of advice for outbound prospecting is a simple one: be persistent! It can take months or sometimes even years to break through to a prospect and turn them into a customer.

Follow the steps we've outlined in this playbook to create a strong prospecting process for yourself or your team. Then, keep applying that process until you strike gold. As we often say at Cognism, *"one more call or email could change your life!"* Good luck!

Send us your feedback

Do you have any comments/feedback about this playbook? Be sure to connect with us on our social media - we'd love to hear from you!

Contact Cognism today

Cognism is the world's best all-in-one globally compliant prospecting solution. Our fresh and accurate business data can help you prospect predictably, build pipeline quickly and generate new revenue.

- Identify more of your ideal customers and engage with them right when they need you most.
- Increase your conversions with intelligent, multi-touch, multi-channel prospecting activity.
- Use analytics to inform your outbound prospecting process and drive better results.

Here's what our sales customers say about us:

MindBridge

"We booked meetings with 5 Fortune 500 customers with the help of Cognism. It's an awesome sales and business development tool." **- MindBridge**

"I 100% recommend Cognism to any business leader who wants to grow their sales quickly. It's delivered ROI for us in just 1 month!" **- Goude Mind**

HORNETSECURITY

"In terms of the data it offers and the expertise and diligence of its staff, Cognism is the best lead generation platform I've worked with." **- Hornetsecurity**

To book a demo with us, simply click the button below!

Request your demo now

Cognism

Cognism is the world's leading all-in-one globally compliant prospecting solution.