



Deliver the moments that matter

Sales Development Playbook

How to break through to prospects using **Direct Mail** And **Gifting**



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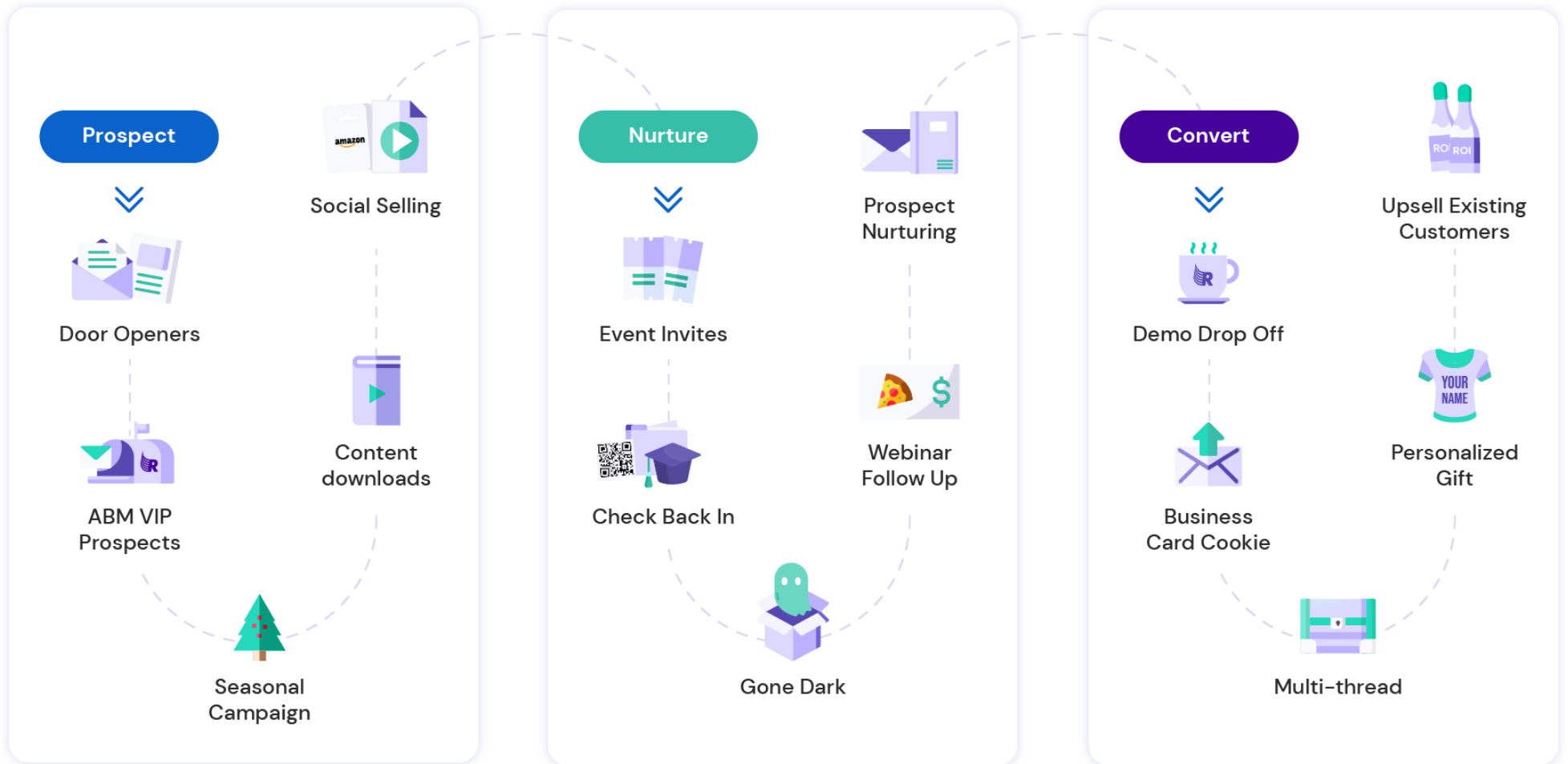
Introduction

Sales development has never been harder. According to a HubSpot survey, the hardest part of the sales process is... you guessed it: prospecting! Prospects are inundated with emails, phone calls and LinkedIn requests.

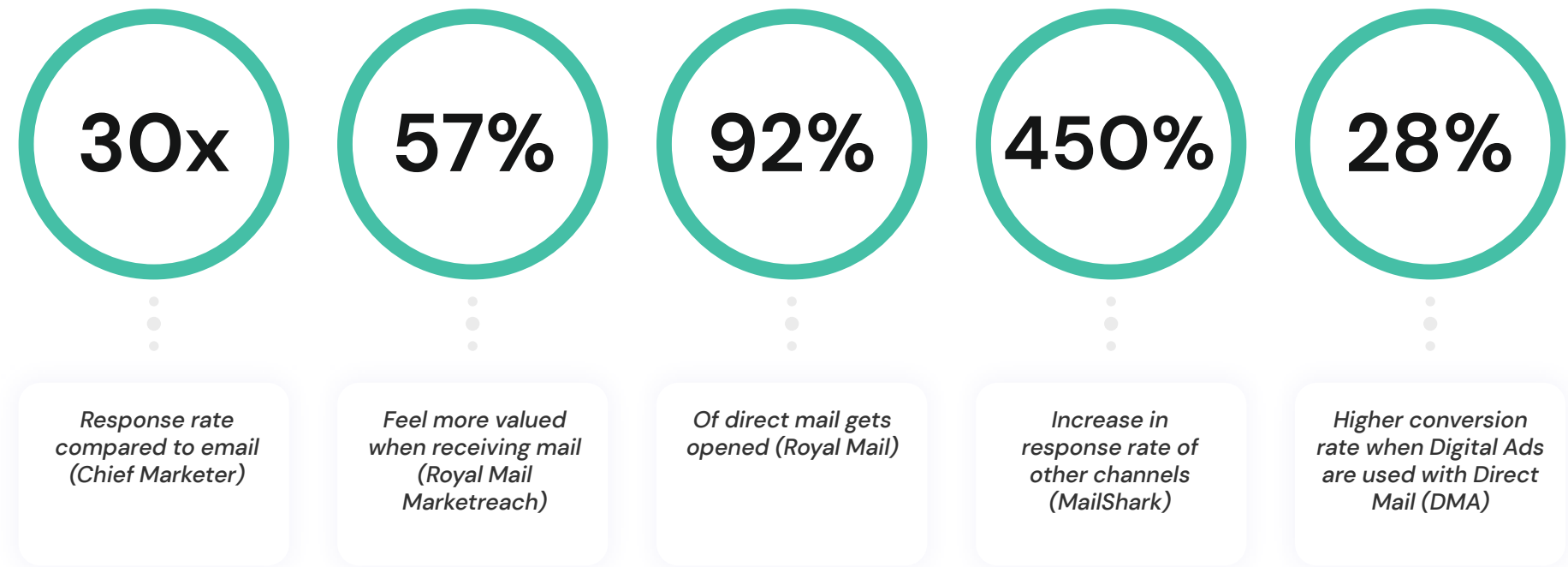
“Your prospects receive **121 emails** a day on average with only **24% being opened** and **48% of them being deleted within 5 minutes**. The phone is still a trusty servant but it takes an average of **18 calls to connect with a buyer.**”

Don't be alarmed though. There's one channel that is having a real comeback to help your message break through the digital noise and reach your prospects: direct mail.





Direct Mail & Gifting in Numbers



Who is this for?



At Reachdesk we're on a mission to enable sales teams to prospect more effectively while creating a better buying experience for potential customers.

This playbook is designed for sales teams that need to boost their gifting and direct mail efforts to break through to prospects as well as those who are looking to get started and join the offline revolution.

Create a sending strategy

Just like anything, you need a strategy. Luckily we created the R.E.A.C.H. framework to help you kick things off. Here are the things to consider before you get sending:

Results

Agree on what matters and then measure for success!

Direct mail can be used as part of an “always on” strategy as well as at “campaign level” for one-off plays. Once you’ve done this it’s important to track results in your CRM or Sales Engagement platform

Let’s face it, when it comes to prospecting we want to book more meetings with the right people. Once you drill down into this there are a few more factors to think about. See what you might be aiming to in the next page.



Create a sending strategy



- Pack a punch as part of a wider campaign
- Re-engage prospects that have gone MIA and are hard to get hold of
- Open more doors with senior decision makers
- Reduce drop-off before discovery calls
- Follow up after events and webinars
- Increase email response rates
- Reach multiple individuals in your Tier 1 ABM accounts
- Multi-thread accounts
- Re-engage closed lost deals
- Boost event and webinar attendance
- Create a memorable moment that matters

Create a sending strategy

Experience

Direct mail leaves a long lasting impression (**49% more than email**) so make it count. Your prospects are busy so stimulate their imagination

You will get the best response from prospects when you gift them at unexpected times. The concept of surprise and delight makes your effort even more recognized as you create an experience. Send items they would use on a daily basis and might use around



Create a sending strategy



Audience

Think about who you are sending to and what they care about. If you sell to multiple industries and personas you might need to make some tweaks so you speak to your prospects using their language.

It's not the thought that counts. It's the thoughtful thought. The best gifts are personalized and all about your prospect

If your prospect feels you can relate to them whilst communicating what your product or services does and how it can help them, then you're on to a winner. Ask yourself "Will my prospect understand the problem we solve and why I'm getting in touch?"

Create a sending strategy

Create Clear CTAs

The best emails and phone calls have clear next steps. This is no different for direct mail and gifts.

Make it easy for your prospect to make the next step. Ask yourself: "Does my prospect clearly understand the next step?" This will differ depending on the results you're looking to achieve. **Here are a few examples CTAs**

- If this is of interest please contact me on (insert contact details)
- I will follow up shortly via email to see if this might be a good fit for you
- Visit this URL to save your spot: www.reachdesk.com/webinar
- Look out for an email from me with a video on how we did this
- I will give you quick call so we can discuss this further



Create a sending strategy



Humanize

Your prospects are humans, not leads. So treat them like humans. We all have moments that matter in both our personal and professional lives that act as triggers for sales reps to get in touch. Triggers include

- New job change or a promotion
- Funding at their company
- A quote from content or video they've produced
- Their alma mater
- Favourite sports team
- Something catchy from their LinkedIn bio

Trevor's Tips

- Be mindful of deliveries scheduled to arrive on the weekend at a corporate address. Some small and midsize businesses utilize lock boxes for weekend package deliveries, and sometimes these are rarely checked - making it difficult to time appropriate follow up.
- If you don't use a sending platform with address confirmation systems and use 3rd party data make sure it's clean with the correct address data for physical sends and email data for eGift sends.
- It's critical to know how long shipping takes so you can prepare your [follow up](#).
- Think about using a service that sends you an automated email trigger when your gift has arrived
- Remember to include your contact information if the recipient doesn't know you by first name (ie top of the funnel prospecting). First name, last name, email and phone is best. If your vendor allows you to include your business card in their gifts before they are sent out, this is also a good option.

Advice from Trevor Martin, CEO of Noms Bake Shop



"I'm the Co-owner and CEO of Noms Bake Shop in Phoenix, Arizona. Noms Bake Shop is a gourmet gifting company that specializes in customized gift boxes with your logo/branding that make for excellent client appreciation and prospecting gifts."

Managing Budgets



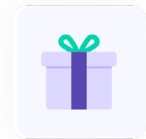
Budget

As part of your strategy it's essential to consider how you budget for your team. Unlike an email, there's a cost to sending. It's one of the reasons why the physical channel holds so much weight as there's tangible value to sending.

For Sales Development teams that plan on using direct mail and gifting as part of an ongoing strategy we recommend allocating between \$150-\$200 per month to each rep if you are targeting mid to enterprise companies. \$80-\$150 per month is the average amount for SMB SDRs.

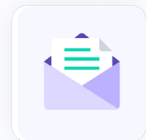
Sales Development Plays

Now you have your sending strategy it's time for the fun part. Here are a number of plays to help you break through to prospects and build long lasting relationships:



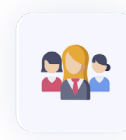
Job Change Gift

The easy option is to congratulate them on LinkedIn and then ask for the meeting. Go above and beyond and surprise & delight your prospect with a personalized bottle of champagne with their face on it. Then ask for the meeting.



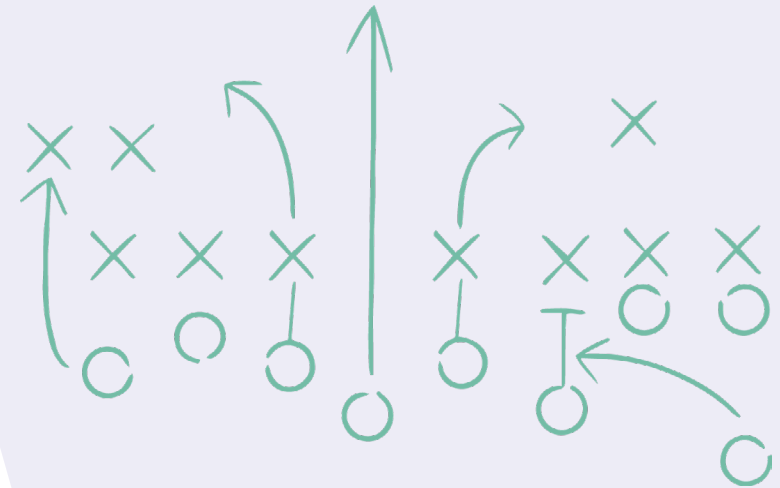
Personalized Digital Gifts

Personal moments really matter. If you know your prospect is a New York Yankees fan, you can surprise them with an Amazon eGift card with a link to this season's new jersey you've chosen. Go the extra mile and screen grab the gift and paste it into the body of the email you sent.



Treat The Team

Making calls and sending prospecting emails on a Friday afternoon can be wasted effort. Prospects are still trying to keep their team motivated on a Friday. Make them a hero by giving the gift of Friday drinks for their team.



Sales Development Plays



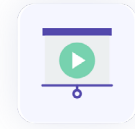
Discovery & Demo Drop Off

We're all busy but nobody likes a no-show. Reduce those drop-offs by sending a digital Starbucks or Dunkin' Donuts coffee 2 hours before a call. Include the purpose of the call and an agenda if it's been pre-booked. Offer them the chance to donate to charity if they'd rather forgo the caffeine.



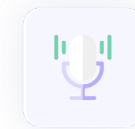
Ghosting Send

Prospects often indicate they are interested but are too busy to commit. Send a box of chocolate ghosts plus a note asking for the meeting from a prospect who just can't seem to commit. Maybe include your meeting link or a QR code that links to your calendar to make life easy for them.



Vidyard Virtual Gift

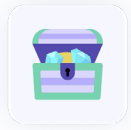
If you use Vidyard or a similar tool for prospecting you can create some powerful moments using your prospect's LinkedIn as well as demoing your product. While your prospect views the video give them something to spend on themselves virtually. They'll thank you for taking care of their next Uber ride when it's raining



Socially Sell

Is LinkedIn getting harder to convert? Connect with a prospect on LinkedIn and send a voice note or video message offering to buy them a virtual lunch to discuss [insert value proposition]. Once they respond positively you can send a digital gift along with a time to speak.

Sales Development Plays



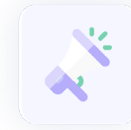
The Unity Play

Trying to get multiple decision makers together? Deliver a treasure chest full of gifts with a combination lock. The code is sent to 3 separate decision makers who can unlock it when they come together. Perfect for ABM programs.



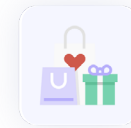
Re-Engage Like A Boss

Cold emails and calls can end up with the dreaded “Get in touch in 3 months please”. Send a simple handwritten note to a prospect who has asked you to get in touch later on down the line. They’ve probably been prospected by 100s of other reps so stand out from the crowd.



Seasonality Sells

Seasonal campaigns can be a great excuse for a large direct mail initiative. Choose your top priority prospects and carefully craft clever messaging alongside your marketing team to break into key accounts. If your product helps with efficiency and saves time it might just be a box of branded cookies that helps take a “bite” out of their week and allows them to do the tasks that matter.



Content Drops

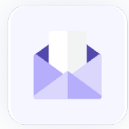
Some companies don’t allow gifts or have a threshold above which they can’t accept. Drop high value content on your prospect’s desk along with something low value to enjoy while reading it. We all enjoy a break with a KitKat and the latest annual report. Equally a message in a bottle often does the trick.

Sales Development Plays



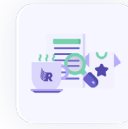
Take Down The Competition

Looking for a new way to displace the incumbent? Takedown campaigns work a treat, particularly if your gift box contains real treats. Work with your marketing team to devise creative analogies. Is integrating your software a piece of cake?...



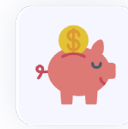
The Multi-drop

Sometimes it takes a few attempts to get C-level prospects to respond. A multi-drop campaign can involve a combination of physical and digital touchpoints. Start with a simple note to pique their interest followed by a higher impact and contextually relevant gift and then an eGift offering times to speak. Mic drop please.



Cross-Sell Sends

Prospecting existing customers can seem straightforward but they don't always respond to email. Expanding those accounts can be done by using social proof and context on how existing business units use your product or services. Sending swag and physical case studies often work nicely.



Funding

If you sell to high growth businesses and they receive a considerable amount of funding, you might be on the money. This is a big moment so treat your prospect like gold and congratulate them on their big achievement. Chocolate coins with a desk coffee plant to support their "growth" might help your message cut through.

Sales Development Plays



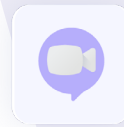
Remote Working Game Changer

Some of your prospects might work remotely permanently or for the time being. The key to success is changing the way someone feels. Sending over a custom landing page link giving your prospects the choice of a bundle sent to their front door to make working from home great. Home workout fitness kits or something for the kids usually do it nicely.



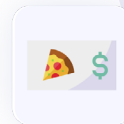
Wine and Dine on Zoom

Ever been to a virtual wine tasting? Until recently not many of us have. But now it's possible by sending wine tasting kits directly to your prospect using address confirmation technology. It's even possible to get virtual sommeliers to host it.



Creative Webinar Follow Ups

Converting webinar attendees into opportunities can be a tricky game. Send a lunch & learn voucher after your prospect has attended a webinar with Uber Eats and a link to book a lunch & learn session with a specialist.



Forward To Key Workers Or Family

Keeping loved ones and key workers refreshed can be done with the click of a button with a simple home delivery. Pizza delivery gifts that can be forwarded on might help you build the credibility and trust you need.

Crafting the perfect message

Personalizing direct mail messages with your prospect's first name increases response rates by 135%. One of the biggest mistakes is to write a generic one-size-fits-all message. Tips on crafting the perfect message:

- "Hi First Name" is the standard for B2B ("Dear" is too formal in 2020)
- First line always needs to be personalized. Ask yourself why you're getting in touch, then state this in the first line
- Keep it short. Don't fall into the trap of writing a lengthy note just because you know it will be read. 300 characters is the absolute maximum
- Focus on the problem you solve and the value you bring. Bear in mind, this is not your chance to sell. If you get it right your prospect will reciprocate



Crafting the perfect message



Create a clear Call To Action. Here are some examples:

1. I will follow up via email in the next 24 hours
2. Please contact me on (insert contact details)
3. Visit this page to find out more: www.reachdesk.com/blog
4. You can book in a time with me by scanning the QR code below
5. I will call shortly to see if this might be of interest

Sign off with your name. The modern sales pro knows how to build a relationship on a personal level. You are the trusted advisor, not your company. So don't sign off with "Generic Company Name".

One liners

Getting the gift right is half the battle. Often it's the message that draws the line between epic and epic fail. One liners as part of a wider campaign strategy can be the real difference between getting the meeting or not.

“Installing Reachdesk is a piece of cake. We’d go well together”

- Send cupcakes with your logo and the target account logo printed on top

“Is there a hole in your marketing strategy?”

- Send branded ring donuts along with a case study on how you helped XYZ company



One liners



“Take a bite out of your pipeline generation efforts”

- Send custom boxes of cookies with your prospect’s name and logo on

“Are you leaving money on the table?”

- Send chocolate coins in a branded box with a video brochure

Following Up

Direct mail and gifting needs to be treated as part of a holistic approach to prospecting. Only 22% of prospects will automatically respond to a direct mail or gifting campaign. This means 78% of recipients will need a follow up.

We recommend following up on all direct mail and gift sends within 24 hours of an item arriving. 48 hours is the absolute maximum. As soon as an item lands this is your chance to break through in a meaningful way.



Do's and Don'ts

Do: Automate.

Set up alerts and tasks in your CRM or Sales Engagement Platform that allow you to follow up in a timely manner.

Don't: Follow up immediately.

We recommend 2 hours after an item has been delivered in case your prospect has been in meetings or on long calls.

Do: Refer to the item sent.

Develop your message from the DM send for a continuous narrative surrounding the messaging.

Don't: Ask what they thought.

This creates an impression that you're expecting something in return.

Do's and Don'ts

Do: Start by calling.

Double dial and leave a voicemail if the prospect doesn't answer the second time.

Don't: Just call.

Use email, LinkedIn and other channels to follow up.

Do: Be persistent.

Design multi-channel follow ups. Perhaps even consider drip feeding DM sends that build on one another.

Don't: Expect a response from everyone.

It might be the highest performing channel but may not warrant a response from every recipient.

Do's and Don'ts

Do: Use video.

Offline communications, combined with video, can be the most dynamic duo to create the longest lasting effect.

Don't: Forget the CTA.

This is your chance to “ask”. State the reason why you’re getting in touch and create a clear call to action on next steps.



Ways to send



If you've been manually packing boxes, hand writing notes, standing in the queue at the post office and guessing when items land then we've got some good news for you. You now get this time and visibility back so you can focus on what's important.

If you are managing a team of Sales Development Reps it's now possible to enable them by providing a clear view of budgets as well as out-of-the-box templates. There are 4 ways to send on a 1-to-1 basis for maximum results:

Ways to send



Digital Gifting

With hundreds of providers to choose from globally, eGift card links can be generated and inserted into Gmail, Outlook, Outreach, SalesLoft, LinkedIn Inmails and many other direct messaging systems. This gives you consistency and allows you to send digital gifts via any channel of your choice.

Alternatively you can send from a native sending email address using a more marketing led creative with custom imagery rather than generating unique links. Monitor opens, clicks and claims on eGifts as this will determine your follow up message.



Office drops

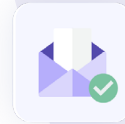
One of the best ways to open a door is to surprise and delight a prospect. Office address data is publicly available and easy to get hold of so sending to businesses is one of the best ways to break through the noise. It can also be a great way to bypass or reward the gatekeeper if there is one.

Ways to send



Landing Page Sends

Not everyone works in an office and remote working might be permanent for some companies now. Generating pipeline in a remote working environment requires some creativity. Custom landing pages can include meeting booking links, content, video and much more. Send these custom links to key target accounts so they can reward themselves for giving you their time. Their personal data doesn't even have to enter your CRM.



Address Confirmation

We don't always know where prospects are located. If you've built a relationship with a potential customer then sending them something on their terms can be the difference between a Yes and a No. A simple email with a link for them to confirm their address allows you to send anything to anyone anywhere.

High Intent Top Accounts



Reachdesk

Day 1.
Make an
impact
campaign



Social

Day 2.
Follow/
Connect on
LinkedIn



Phone

Day 2.
Follow Up
Call



Email

Day 2.
Intro Email



Phone

Day 4.
Cold call



Email

Day 4.
Email bump



Phone

Day 7.
DM
follow-up



Social

Day 8.
Comment
on post or
Tag



Email

Day 10.
Case Study



Reachdesk

Day 11.
Handwritten
note



Phone

Day 15.
DM
follow-up



Phone

Day 17.
Cold call



Email

Day 18.
Industry
Knowledge



Social

Day 20.
inMail



Phone

Day 22.
Cold call



Phone

Day 23.
Cold call



Break-up

Day 25.
Email

High Intent Top Accounts



Clicked on
Content



eGift Card



Opportunity
Generated



eGift Card



Opportunity
Postponed



Nurture

Cold



Email

Day 1.
Personalised
email + hook

Social

Day 1.
Follow/
Connect on
LinkedIn

Phone

Day 2.
Cold call

Email

Day 3.
Email bump

Phone

Day 4.
Cold call

Email

Day 4.
Make an
impact
campaign -
Alexa/-
Siri/Home

Phone

Day 7.
DM
follow-up

Social

Day 8.
Comment
on post or
Tag

Email

Day 10.
Case Study



Reachdesk

Day 11.
Handwritten
note



Phone

Day 15.
DM
follow-up



Phone

Day 17.
Cold call



Email

Day 18.
Industry
Knowledge



Social

Day 20.
inMail



Phone

Day 22.
Cold call



Phone

Day 23.
Cold call



Break-up

Day 25.
Email

Cold



Opportunity
Generated



eGift Card

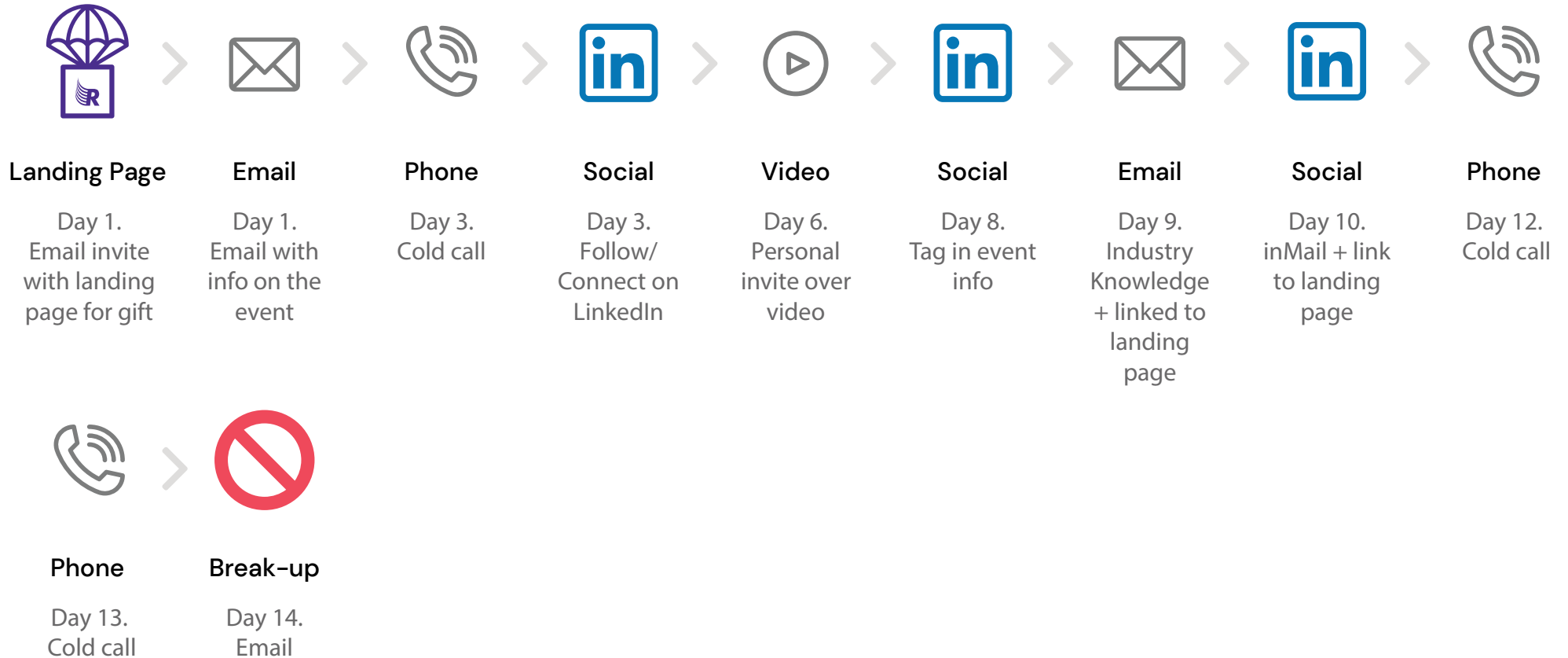


Opportunity
Postponed



Nurture

Pre-online event for VIPs



Pre-online event for VIPs



Click on
Landing Page



Sign Up To
Event



Select Gift



Gift Lands

Post-event/webinar



Video

Day 1.
Thanks for attending webinar

eGift

Day 1.
Offer lunch & learn to key prospects

Social

Day 3.
Connect on LinkedIn + Voice Note

Email

Day 3.
Recap of event and follow up

Phone

Day 3.
Cold call

Social

Day 5.
Comment on post or Tag

Email

Day 7.
Industry Knowledge + linked to landing page

Social

Day 9.
Follow up LinkedIn message

Phone

Day 12.
Cold call



Phone

Day 13.
Cold call

Break-up

Day 14.
Email

Post-event/webinar



Opportunity
Generated



eGift Card



Opportunity
Postponed



Nurture



Click on
Landing Page



Choose Demo
Date

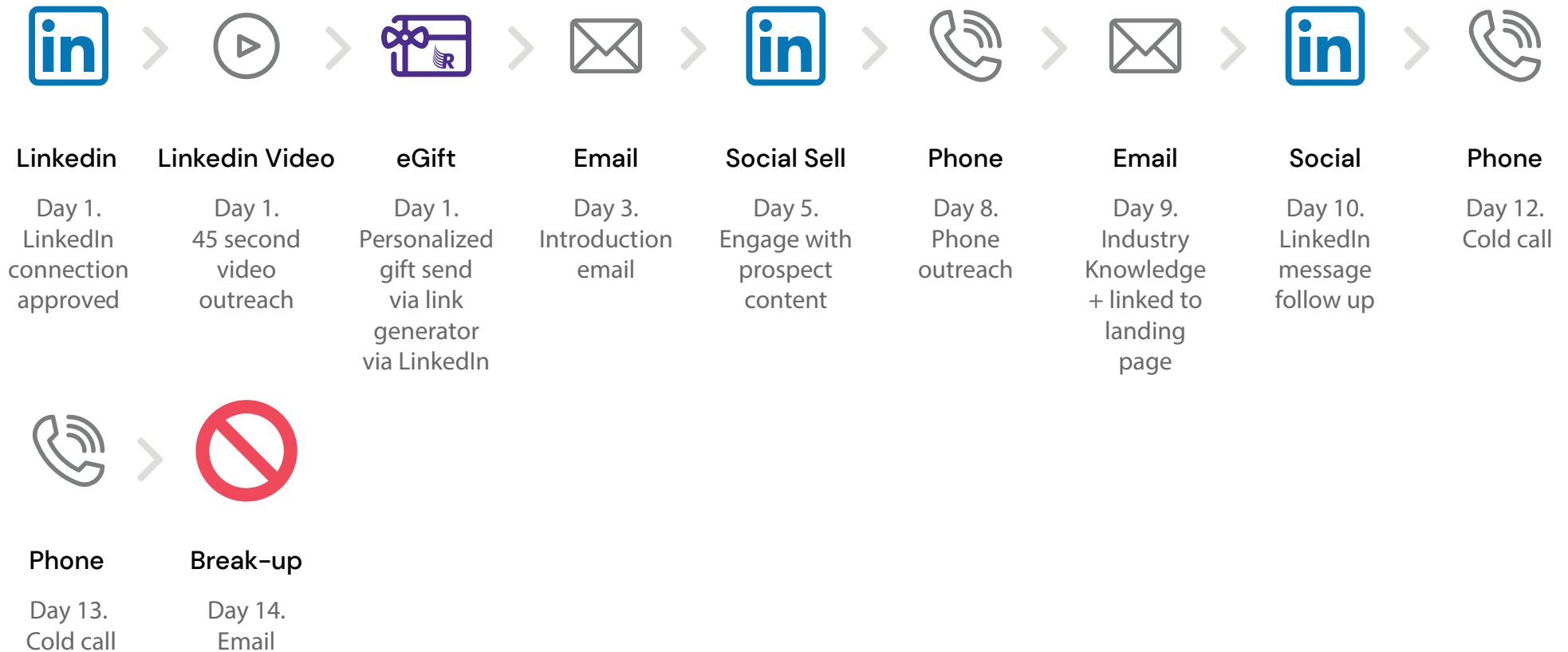


Select Lunch
Voucher



Gift Lands

LinkedIn Social Selling



Tech Stack + Data

Let's face it. Nothing works well without technology and data to supercharge SDR efforts. We handpicked some of our favourite providers to help change the game for Sales Development professionals so they can scale their direct mail and gifting.



Sales Engagement Platforms

Outreach and SalesLoft continue to lead the charge in the Sales Engagement space. By integrating your direct mail and gifting strategy into touchpoints within these systems you can map out when to send and measure engagement. You can also trigger next best steps on when to follow up via email or phone.



Tech Stack + Data



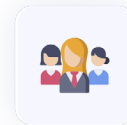
CRMs

Salesforce and HubSpot hold a lot of valuable data on prospects so you can continue to be personalized, relevant and timely. Ensure your address, email, contact and persona data is kept up to date to save time when it comes to sending.



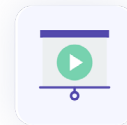
Social

LinkedIn is the clear powerhouse of the social selling space. Use research taken from prospects to create personalized and relevant sending experiences that resonate with them. Triggers like job change and funding can be powerful signals to engage. Voice notes can be the perfect follow up if you're connected.



Data Providers

Keeping data fresh and clean can be a challenge for many outbound sales teams. Companies like Cognism, ZoomInfo and LeadIQ can keep your email and address data fresh so you are sending to the right place for maximum effect.



Video

There's nothing more personal than a video with your reason for getting in touch. Pack a punch into your pitch and leverage video by showing your face. Go the extra mile by showing your prospect your product and what it can do for them along with the heads up on the gift you just sent them. LinkedIn video drives high engagement for prospects in your network if done right.



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