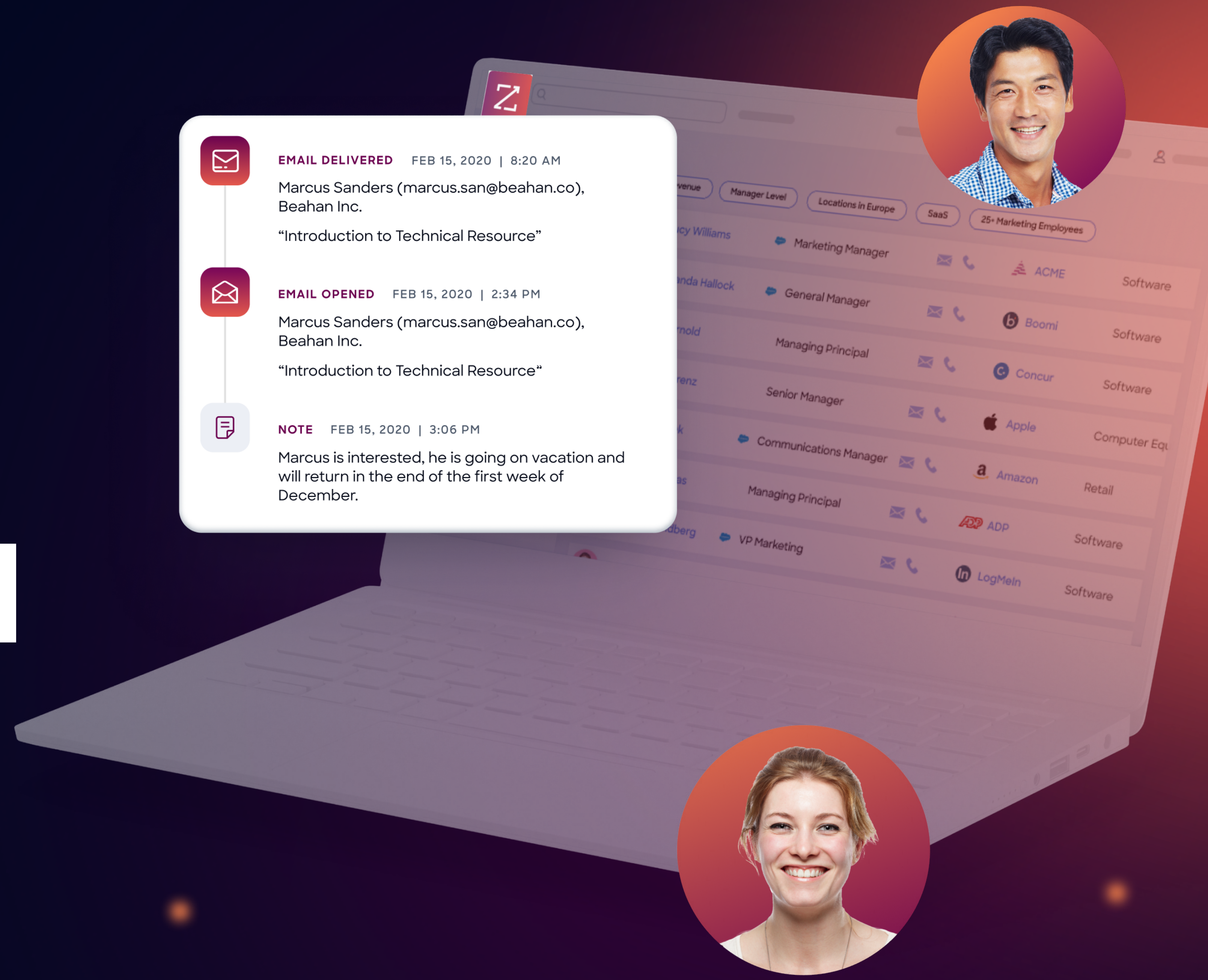
Engage

B2B Sales Playbook

16 Go-to-Market Plays For Your Entire Sales Funnel



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Introduction

Nurturing leads through your sales funnel is a critical yet daunting task for many business development teams, especially at the scale required to achieve lofty growth goals. Hitting your number requires a methodical sales approach, and breaking through the digital noise demands a personal touch. Personalized prospecting is possible at scale, with the right resources in place.

Consider how many touches it takes to close a deal: It's estimated that the average B2B deal requires dozens of touchpoints and typically involves up to eight different stakeholders. That's why teams are turning to more sophisticated sales engagement platforms in order to help automate tedious sales tasks, empowering them to focus more time on connecting and selling.

What brings it all together? At ZoomInfo, we've found that a rock-solid go-to-market playbook is key. That's why we've gathered some of the best go-to-market plays from our own B2B sales and marketing pros and packaged them here for you. These 16 plays are aligned to different stages of the sales funnel. Try them in your next salesflow or use them as inspiration to formulate your own winning sales engagement strategy.

You can find these plays and more at: pipeline.zoominfo.com/plays

Cold Outreach Plays

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PLAY 1:

Follow news to inform campaigns

Scenario

As the economy fluctuates, new opportunities arise. Monitor the news to target segments of the market that have been affected by headwinds or tailwinds. Identify companies in your ideal customer profile (ICP) that may be affected by events, legislation, or market trends.

Send a tailored email message identifying the situation and offering assistance or educational materials that show how to take advantage of available resources (and your solutions). By staying in tune with economic trends, you can better position your product as a relevant and timely solution to prospects' business challenges.

Triggers

- Market development (e.g. federal spending programs, regulatory changes, or major market fluctuations.)

Actions

- Create a campaign targeting a market segment affected by an economic or market development.

> **"There is a confidence that can help conversion rates when you're calling a pool of people who are most likely in the market for your product or solution."**
>
> **Brian Vital**
> VP of Sales Development
> ZoomInfo

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PLAY 1:

Follow news to inform campaigns

Sample Emails

1

Subject line:
[First name] – these businesses need your help

Email:
Hey [first name],

As states begin to reopen, restaurants and bars need your help. The government recently rolled out a restaurant revitalization fund. Download our guide for how to help your customers access this fund so you can help them get back on their feet.

[your company name] can help you [value proposition]. Do you have 15 minutes tomorrow to discuss how we can help your team?

2

Subject line:
Re: [First name] – these businesses need your help

Email:
Hey [first name],

Did you get a chance to read my previous message?

I'm reaching out because your services could be benefiting from a massive tailwind right now – and [your company name] can help you [value proposition].

Do you have time to talk tomorrow?

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PLAY 2:

Cold call fast follow referencing sent email

Scenario

We're desensitized to the dozens of emails that flood our inboxes every day. This is bad news when it comes to cold prospecting. In order to stand out – and get your message across before it's deleted or ignored – immediately follow up your email with a cold call. This personalized touch can go a long way in showing the prospect you care and may reduce future objections.

Triggers

- Email delivery date

Actions

- Automated email followed by phone call

Sample call track

Hi [prospect] … [your name] calling from [company name]. How have you been? … The reason for my call today is to point you in the direction of an email I sent your way that outlines a few ways I believe we can help your business. I shared a few examples of the direct impact I believe we can have [cite specifics from the email – this is where you need to be direct]. I also highlighted a few real-world case studies from our customer base where we had a similar impact already. Have you had an opportunity to look over that yet?

If they say yes: Go for the meeting or be ready to overcome an objection.

If they say no, which is the more typical response: – Great, well then I'm glad I called. If you could pull up that email, I believe you'll see the importance of working with a company like ours or if calendars permit, I'd love to find some time to talk this week/next week about how we can support you.

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PLAY 3:

Follow up out-of-office replies with a welcome back message

Scenario

A prospect's out-of-office reply comes back from a drip campaign you're running. Don't miss an opportunity to build rapport and humanize the sales process: Using automation, drop any out-of-office leads into a separate sequence before resuming your drip campaign. The new sequence schedules a short, cheery welcome back email two days after the lead returns to the office. Reps should immediately call once the lead opens the welcome back message.

Triggers

- You receive an automated out-of-office email when emailing a prospect

Actions

- Add out-of-office prospects to a sequence that sends a short welcome back email two business days after the lead's stated return to the office

Sample email

Subject line:

Welcome back!

Email:

Hey [first name],

Hope you enjoyed your time off!

I'm bubbling up my previous email to the top of your inbox. I truly believe the information I provided can make a significant impact for you and your organization this year.

Looking forward to hearing back.

With your success in mind,

[sales rep name]

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PLAY 4:

Follow champions from company to company

Scenario

Customer champions take a long time to cultivate. The sales rep initiates the relationship through the sales process. Once the contact becomes a customer, the customer relationship manager supports the client's needs and builds them into a champion. If a customer champion changes companies, there is an opportunity for your sales rep to reconnect with them and bring in new business.

If the new company does not have your product, you can reach out to the champion, reignite the relationship, remind them about the value of your product, and explain how you can help their new organization. A B2B data intelligence tool can automatically update contact information for your champions to ensure that you won't lose touch if they change jobs.

Triggers

- Advocate/influencer of your product changes employer

Actions

- Reach out to the champion to re-connect, remind them of the value of your product, and offer to help their new organization.

Sample email

Subject line:

[First name] - quick question

Email:

[first name],

Over the last few months, many companies have expressed concern about lost productivity and the ability to sustain growth in these unfortunate and uncertain times. Canceled events and sudden changes in teams have made our jobs much more challenging.

It looks like you had a license for [your company name] at your previous company; I'm reaching out because I want to help support your team through these difficult circumstances.

Can we connect for a few?

Thanks,

[sales rep name]

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PLAY 5:

Stalled opportunity follow-up

Scenario

Just because an opportunity was created by a sales rep doesn't mean it's chugging right along toward becoming a closed deal. When an opportunity stalls, have your VP of sales intervene with an email that includes a clear call to action.

Triggers

- Opportunity remains in the same stage for 30 days

Actions

- Reach out to the champion to re-connect, remind them of the value of your product, and offer to help their new organization.

Sample email

Subject line:

[Your company name] - Executive Support

Email:

Hey [first name],

Thanks for taking the time to evaluate [your solution] as a tool to help you [value proposition]. My name is [sales leader/exec name], I'm the [title/role] here, and I work closely with [sales rep name].

[sales rep name] has been keeping me updated on the conversation thus far and from the looks of it, it seems like things have stalled out. I was hoping to understand your hesitation and see how I can help support your team.

I'm willing to work with you to find an option that fits your needs. After speaking with [sales rep name], I'm confident we can make a measurable impact on your revenue growth in [year].

Can we set up a call next week? I look forward to hearing from you soon.

With your success in mind,

[sales leader/exec name]

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PLAY 6:

Unviewed DocuSign follow-up

Scenario

Your sales representative has been working on an opportunity for months. To close the deal, she needs a key stakeholder to complete the DocuSign contract. But for some reason, the contract hasn't been signed – maybe new priorities have popped up, or the point of contact is waiting on final approval from higher-ups.

The rep is juggling several other deals in the pipeline, so it's challenging for her to be proactive about finalizing the contract. An automated, executive-sponsored email sequence can handle the heavy lifting required to stay on top of the key stakeholder and prevent the deal from stalling.

Triggers

- No engagement with DocuSign contract in 48 hours

Actions

- Initiate email sequence from a sales leader

> **"The qualitative value of responses is the real win here, as it has surfaced many stuck DocuSigns and helped us identify a path forward."**
>
> **Dominique Catabay**
> Revenue Generation Manager
> ZoomInfo

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PLAY 6:

Unviewed DocuSign follow-up

Sample Emails

1

Subject line:
[Company name] [executive title] – need support ahead of the weekend

Email #1:
[first name],

I know you have been working with [sales rep name], and we are super excited to have you partner with us. I wanted to make sure you have everything you need ahead of the weekend and offer myself as a resource if you need any additional assistance before signing your agreement.

I assure you that we're 100 percent dedicated to this partnership for the long haul and excited to help you plan strategically for [timeframe]. Let me know if there's anything I can help with.

With your success in mind,

[executive signature]

2

Subject line:
REPLY
CC: [additional resources, such as your customer success and/or product leadership]

Email #1:
[first name],

I hope this note finds you and your family well this weekend.

I wanted to check in again to make sure you have what you need to sign. My team and I are looking forward to partnering with you and are standing by to address any outstanding concerns about moving forward.

I'm including [resource(s) name and title] with this note in case you have any questions about [use case(s)]. I assure you that we're 100 percent dedicated to this partnership for the long haul and excited to help you [business objective] through [timeframe]. We're here all weekend, please don't hesitate to reach out.

Best regards,

[executive signature]

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PLAY 7:

Use deal velocity to adapt approach

Scenario

ZoomInfo InboxAI is a solution that mines the email inboxes and calendars of your customer-facing representatives (sales, account management, customer success, etc.) and captures contacts and populates them in the SalesForce CRM along with all of the associated activity (calls, emails, and meetings). InboxAI is then able to analyze that activity and apply an engagement score to contacts, accounts, and opportunities.

We use InboxAI engagement score to gauge deal velocity based on the volume and frequency of inbound and outbound emails, meetings, and calls. We have found InboxAI to be a better predictor of opportunity likelihood to close than other signals or qualitative commentary from sales reps. By tracking this activity, we are able to target deals that are slowing with a drop in communication and re-engage. The goal is for an SDR or AE to schedule a meeting. If a deal is accelerating, lean in and try to close out the deal. If the deal is decelerating as measured by the number of days in a stage, re-engage with AEs and SDRs to get the deal moving again.

Triggers

- Increase or decrease in engagement score
- Time stuck in sales stage

Actions

- Email to schedule additional meeting

Sample email

Subject line:

[First name] - last call for [key result from your product]

Email:

[first name],

I understand you may be really busy, but I would hate for [account name] to miss out on a great opportunity. [your company name] has a lot to offer you, including the best [features/capabilities].

Give me 15 minutes, and I'll be sure to stop bothering you if you don't see value. How does [date] work?

Best,

[sales rep name]

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PLAY 8:

Enliven degraded opportunities

Scenario

Generate a list of 60-day old open opportunities that have gone 45 days without a meeting. Then send an email from your CRO, or VP, or director on the sales team to the main point of contact on each opportunity. The revenue operations team should identify other potential contacts to multithread communications. After the emails go out, send a call-behind list to the SDR team to track down next-step meetings for the respective opportunity owners.

Triggers

- Run a monthly report on open opportunities that are at least 60 days old and have gone 45 days without a meeting.

Actions

- Send the list to the opportunity owner to confirm or deny inclusion in a sequence to re-engage the opportunities. The sequence is an email to the main point of contact from an executive at your company. Identify other good-fit contacts at the account (multi-threading) and add them to a sequence sent from the opportunity owner's manager. Have an SDR follow up with a call after emails are sent.

Sample email

Subject line:

[Your company name] - Executive Support

Email:

Hey [first name],

Thanks for taking the time to evaluate [your company name] as a tool to help you [value proposition].

[sales rep name] has been keeping me updated on the conversation thus far and from the looks of it, it seems that things have stalled out. A lot of the customers we are speaking with now are taking action to finalize plans to make sure they can finish [quarter] strong and set themselves up for success in [next quarter or year].

We are willing to work with you to find an option that fits your needs specifically.

Can I do anything to support next steps in your evaluation? I look forward to hearing from you soon.

Best,

[sales leader name]

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PLAY 9:

Web form submission fast follow-up

Scenario

Responding quickly to inbound inquiries will dramatically increase your chances of success. A recent study showed conversion rates are eight times higher when salespeople place their first call within five minutes of getting a lead.

When a website visitor researches a solution and fills out a web form for a product demo, the assigned SDR should receive an automated alert and contact the prospect immediately. If they can't reach the prospect, they should leave a voicemail and add the prospect to a follow-up email sequence requesting a call.

Triggers

- Web form submission
- Prospect has immediate interest about a product

Actions

- Call prospect within five minutes of form submission
- If the lead doesn't answer, leave a voicemail and call again at set intervals, in addition to emailing the prospect
- If an SDR is busy when a form submission comes in, the rep should route the request to another SDR
- Append prospect with mobile phone, company information, and additional buying committee

> **"When we get back to a lead in under 90 seconds, it exponentially increases the likelihood of us converting that lead."**
>
> **Henry Schuck**
> CEO & Founder
> ZoomInfo

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PLAY 9:

Web form submission fast follow-up

Sample email

Subject line:
[First name], let's schedule that demo you requested

Email:
[first name],

Thank you for your interest in our services. You submitted a demo request form, but I haven't been able to reach you by phone yet to schedule the demo.

Please let me know some good dates and times for the demo on your end.

In the meantime, if you have any questions about our services, don't hesitate to contact me by replying to this message or calling me directly.

Best regards,

[sales rep first name]

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PLAY 10:

Unconverted inbound lead go-back

Scenario

If a hot inbound MQL has not converted 45 days after a form fill, add them to a re-engagement sequence.

Triggers

- An inbound hot MQL has not converted to a meeting within 45 days of form fill

Actions

- Add them to a re-engagement sequence

Sample email

Subject line:

Reconnect - [your company name]

Email:

[first name] – you filled out a form on our website a while back but we were never able to schedule a call. I wanted to reach back out to see if there was still an opportunity here to connect.

Our customers use [your company name] for a number of things – [insert three to five examples]. Essentially, we are [short value proposition].

You filled out a form presumably because you were looking to improve in one of these areas. I want to make sure that you are taken care of – can you carve out a few minutes to reconnect this week or next?

Thanks,

[sales rep name]

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PLAY 11:

Expand buying group on inbound leads

Scenario

When a new lead comes in through a high-value web form, pursue the rest of the buying group at the account. After all, many purchasing decisions are done by a committee rather than an individual. To save time, trigger automated, relevant emails to the buying committee members right after their colleague fills out the form. By doing so, you can inform a wider audience about your product, get buy-in at multiple levels, and accelerate the sales process.

Triggers

- New lead from high-value form

Actions

- Initiate email sequence to the rest of the buying group at the account

Sample email

Subject line:

Just connected with your colleague [colleague's name]

Email:

Hi [first name],

Hope you're doing well. [colleague's name] just requested more information about our product [company and/or product name], and I wanted to keep you in the loop.

[Elevator pitch]

I'd love to chat more about how we can have an immediate impact on your business in [quarter]. Do you have time for a 15-minute conversation this week?

Best,

[sales rep name]

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PLAY 12:

Free trial for accounts with multiple inbounds

Scenario

Multiple inbound leads from a single prospect account may indicate recurring business challenges that a product can solve. An email sequence offering a free trial and targeted to high-placed decision-makers at the account can start a useful conversation. Acknowledging a heavy number of inbounds from a company and offering to support the issues that need to be fixed creates an opportunity to show the value of the product or service. Noticing inbound lead patterns and then targeting higher-ups at an account takes advantage of data known about a prospect, potentially increasing the chance of a sale.

Triggers

- More than one inbound lead received from a single account

Actions

- Begin an email sequence to engage higher-up contacts at the account
- Set up an auto-provisioned free trial

Sample email

Subject line:

[Name] - free trial offer

Email:

Hi [name],

Over the past few months, multiple members of your team requested information about [company name] and [product name]. Our solution addresses [problem 1], [problem 2], and [problem 3]. Given that your team has a fair amount of interest in the solution, I wanted to reach out and offer you and the team a free trial for [x] days to explore the solution and see if it's a good fit for addressing your needs.

I'm happy to chat more about it at your convenience.

Best,

[SDR Name]

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PLAY 13:

Upsell to customers likely to grow quickly

Scenario

This play aims to benefit from the identifiable attributes of your best customers. The goal here is to focus your upsell efforts on the accounts that are most likely to grow quickly.

Run an analysis to identify common attributes about high-spend accounts or accounts that are growing their spend rapidly. Then use those attributes to identify lookalike accounts (i.e., the same size or technology profile) that are currently low-spend customers. Alternatively, you can use ZoomInfo's list import and lookalikes features to streamline the analysis and identification of common attributes and lookalikes.

Triggers

- Low-spend accounts with attributes similar to the high-spend account list.

Actions

- Initiate an email sequence to the lookalike accounts.

Sample email

Subject line:
Reviewing your account

Email:
Hi [first name],

I can't believe we finally made it to [year or quarter]!

I noticed that the team over there at [account name] has really been getting into the platform. [product offering] is for sure the foundation of a successful go-to-market engine, but there are so many other features, functionality, and tools I want you to make sure you're taking advantage of.

With the [timeframe] approaching, does it make sense to do an account review with [account name]?

If you're interested, let's set this up. Are you available this week?

Regards,

[sales rep name]

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PLAY 14:

Additional user upsell

Scenario

Many companies are growing and their current seat license capacity may not reflect their current or future needs. For customers near or at capacity, reaching out and inquiring about opportunities to add additional seats can open doors to upsell opportunities for new users.

Triggers

- Customer near or at capacity on seat licenses

Actions

- Email the admin or main point of contact to check on their need for additional licenses

1

Subject line:
[First name], does your team have what they need?

Email:
Hi [first name] [last name],

Over the past month, many of our customers have been adjusting to a new normal that requires new strategies to sustain growth.

Your prospects and customers may now be fully remote, or splitting time in the office. Having multiple points of contact is more important than ever right. I was looking at your account and realized that you are getting close to maxing out your user licenses. Fortunately, we have a few special offers for adding users to your account to help accelerate growth ahead of the end of the year!

Do you have a few minutes available today to review the offers? I'd be doing you a disservice if I didn't go over them with you, as they're pretty compelling.

Best,

[sender first name]

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PLAY 14:

Additional user upsell

Sample emails

2

Subject line:
Reply

Email:
[First name],

Following up on my previous note. Any chance we can connect next week to run through some of our November offerings? They're only available until the end of the month. If you're looking to add more licenses, now is a good time to see how we can help.

Best,

[sender first name]

3

Subject line:
Reply

Email:
Hey again,

I'm sure you have a ton on your plate and I want to help support your team. Any chance you have a few minutes today to review this month's options around adding users to your account? If you're not available today, let me know what day works best for you.

Thanks,

[sender first name]

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PLAY 15:

Upcoming renewal sales flow

Scenario

As a renewal approaches, it's important to get in front of buyers to understand how their priorities have evolved over the course of the relationship. You need to know the concerns and challenges that your point of contact is encountering. Send an automated sequence to approaching renewals to set up a meeting. For contacts that are difficult to reach or renewals that are fast approaching with no resolution, offer varying levels of offers and upsell or concessions based on data from their engagement and usage.

Note: Run different plays based on the customer health score. We use a combination of product usage data plus how engaged the relationship has been over the past year. This contributes to a customer health score that lets us know how likely someone is to renew. We channel these metrics into different sequences to take different approaches with different accounts.

Triggers

- Renewal date in three months (or relevant time period for your business)

Actions

- Sales flow
- Segment by Product, Usage Grade, and Segment

Sample email

Subject line:

Early renewal options

Email:

Hi [first name],

We are quickly coming up on your renewal and I have some added flexibility to give you incentives to renew early before the end of the quarter. Our team is continually improving and expanding the platform to further support your needs. Just take a look below at several new features we recently released that will help your team improve [insert value add here].

While there are a few different incentives available if you renew before the end of [month], it's important that we connect to identify which will make the biggest impact for your team. Let's schedule some time [tomorrow or early next week] to talk through the details.

Best,

[account manager name]

PLAY 16:

Upgrade campaigns based on package

Scenario

The natural customer life cycle – or your sales calendar – creates great opportunities to upsell. Tailor your campaigns to incentivize customers to upgrade to a new package.

People who have good engagement generally want more functionality, but the threshold might be too high. Unlock those upsells by offering a package that meets your client's needs. For example: If they've signed up for advanced level, highlight features that fit their case for upgrading to the best package. Show them additional features they're missing out on that could spark more interest.

Triggers

- Customer has a lower package at quarter end or year end
- A natural customer life cycle
- Positive intent signals toward a given product feature

Actions

- Initiate an email sequence followed by a rep call.

Sample email

Subject line:

[Your company name] - have you considered an upgrade?

Email:

Hi [first name],

In this ever-changing world, companies continually look for ways to streamline their business while leveraging their partnerships to see increasing value over time. At [your company name], we are always looking for ways to provide this sort of value for our customers.

To help provide immediate value, we have a few different incentives running through [timeframe] around upgrading your [package/subscription]. While you are already familiar with the value our product provides, upgrading to [name of upgrade] allows you to gain access to even more!

- [benefit 1 name] - benefit 1 description
- [benefit 2 name] - benefit 2 description
- [benefit 3 name] - benefit 3 description

There are even more benefits, so I'd love to have a conversation about which would be the most valuable for your team specifically. Do you have 15 minutes tomorrow to connect?

Best,

[sales rep name]

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Don’t just prospect – Engage

You have your salesflows in place. You have your target accounts. But you need a solution that will make your workflow easier. Prospecting shouldn’t be a difficult task, and it shouldn’t be an administrative burden for your team.

Enter ZoomInfo Engage – a sales engagement platform that goes beyond just prospecting to create smarter, more efficient selling processes with phone, email, and automation capabilities that are sophisticated and easy to use.

See ZoomInfo Engage in action! Schedule your demo at engage.zoominfo.com.

> **“Engage is a user friendly and intuitive tool that gives us everything we need to accelerate our outreach and simplify workflows.”**
>
> **Morgan Gaspard**
> Director of Brand Marketing
> OPTX

> **“ZoomInfo’s Engage tool is a little bit of a crystal ball that can help you contact leads in a very targeted way. All the other features are great and a must for my every day tasks but I am finding Engage is definitely a must for my day to day email interactions.”**
>
> **Otto L.**
> Account Executive, Insight Exhibits