zoominfo

The Ultimate Guide to Sales Outreach

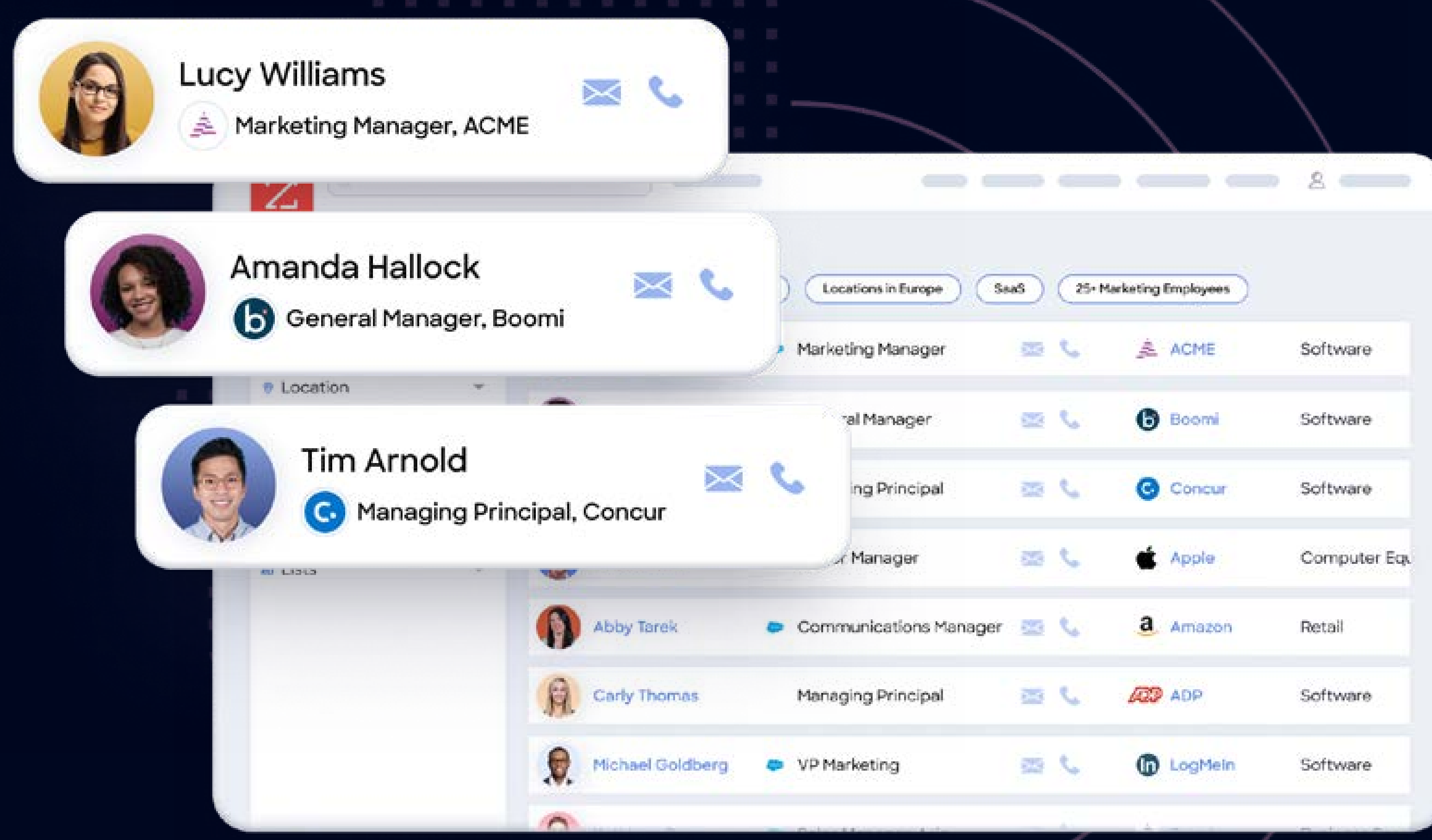
Introduction

Want to hit your number? First you have to nail down your prospecting strategy.

This is easier said than done. [According to HubSpot](), more than 40 percent of salespeople say prospecting is the most challenging part of the process. This includes identifying potential good-fit customers and trying to move them further down your sales funnel.

There are two primary categories for prospecting: responding to inbound leads and pursuing outbound leads. Both are crucial to scaling your business. Without a strategic approach to each, you risk lost productivity.

We're here to help. Read on to learn best practices and proven strategies to pursue inbound and outbound leads efficiently and effectively.



Inbound Leads: How To Respond

Adopt ZoomInfo's best-in-class strategy.

An **inbound lead** is someone who has requested information about your business, usually through a phone call or a website form. Because they're actively seeking a solution, they're more likely to buy and they're probably further along in the sales cycle.

It's crucial to contact these prospects a few minutes after receiving their request, while they're still thinking about you and before they've had a chance to explore other options. According to Vendasta, after five minutes, the odds of qualifying a lead drop by 80 percent.

"A lot of our research and data shows that, from the moment of form fill, your interest and engagement deteriorates with every minute that goes by," says Scott Sutton, vice president of sales operations at ZoomInfo. "It's a steep decline. So the faster you can get back to a prospect from the moment they show interest, the more likely you are to get the demo and the deal."

At ZoomInfo, we respond to every inbound lead we receive within 90 seconds, triggered by automated alerts to designated SDRs. We've had great success with this approach: ZoomInfo fields 10,000 hot inbound leads every month, and with 90-second responses, SDRs book 6,500 demos on average.

When you pick up the phone, start by asking the prospect why they're reaching out and why now.

"We want to understand the driving factor behind the reason they're visiting our website," says Chaz Knauft, director of sales development at ZoomInfo. "From there, we let the conversation unfold. It's much more about asking questions and being genuinely curious than it is about following a specific talk-track."

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> **Scott Sutton**
> Vice President of Sales Operations, ZoomInfo

If the prospect doesn't pick up, put them into an automated email follow-up sequence using this template:

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

[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.

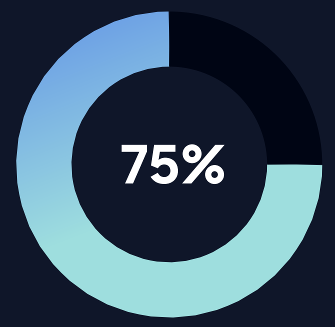
Please let me know some good dates and times for the demo on your end. In the meantime, if you have any questions about our services, don't hesitate to ask me by replying to this message or calling me directly.

Best regards,
[SDR signature]

Once your inbound lead books the demo, the battle isn’t over. There will always be a percentage of no-shows. Many companies look at those people as a lost cause or waste of time. We look at it as another opportunity to sell, and you should too.

“What we have put in place is a process that programmatically starts following back up with the prospect. Not only that, but we have a sub-team in the inbound SDR group that dedicates time every day to focus solely on a reschedule motion,” Sutton says.

To reduce manual effort, a sales leader should set up notifications in your CRM so reps know when prospects didn’t show up to meetings in the last week. From days eight through 20 after the no-show, reps can try to re-engage the prospect through calls and emails.



We’ve managed to achieve a 75% completion rate on demos booked with this approach—you can expect similar results.

Use this template when reaching out to reschedule:

Subject Line: *[first name] - Let’s try this again*

[first name],

Looks like you weren’t able to connect with my director. I totally appreciate that things come up, but I remain confident you will find a conversation about [product name] highly productive.

Do you have 15 minutes later today to reconnect? If not, here is a link to my calendar: [link].

Respectfully,
[sales rep name]

Outbound Leads: How To Reach Out

Sell quicker and better with these proven tactics.

An **outbound lead** is probably what comes to mind when most people think about sales. It refers to someone who is deemed a good fit, but hasn't necessarily engaged with your company. Outbound leads are especially crucial for small and mid-size businesses because they may not be receiving many inbound leads. And that means cold outreach is crucial.

Cold calls

Cold calls are perhaps the most common method of outbound prospecting. According to RAIN Group, 82 percent of buyers accept meetings with sellers who reach out to them. You just need to know who to call and what to say.

Here are five easy steps to improve your cold calls:

Step 1

Research the prospect

The best way to approach a cold call? *Warm it up.* Research who you're going to be talking to. Have they (or any of their colleagues) previously engaged with your company? If so, lead with that. You can also check their LinkedIn profile to see if you have anything in common to help break the ice.

Step 2

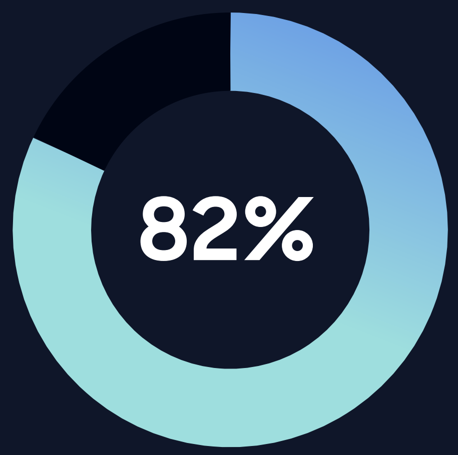
Research the account

Visit the prospect's website and follow the "three in three" rule: Spend three minutes identifying three things about what their company does. If you're an SDR, you might be making up to 75 calls per day—you don't have time to thoroughly research every single account you're pitching. Instead, learn just enough to be informed and pose educated questions.

Step 3

Personalize the conversation

Sales is a game of connecting and building rapport. If the prospect likes you, they're much more likely to be open to conversation. According to Gong, simply asking "How are you?" can triple the likelihood of booking a meeting.



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RAIN Group

When used appropriately, humor is also a great tactic. If you can keep the prospect engaged by making them laugh, you're more likely to hold their attention and have a productive call.

Step 4

Book the meeting before you hang up

If they are interested in a demo (or whatever the next step is in your sales cycle), agree on a day and time while you have them on the phone. Make sure you have your AE's calendar pulled up with multiple options at the ready. Stay on the phone until the prospect confirms they've received the invitation.

Be sure to mention something memorable from your conversation in the description of the invite. For instance, if you talked about their kid's soccer game, incorporate that in your message. That way, they're more likely to remember you and the conversation.

Step 5

Have a voicemail script ready to go

If your prospect doesn't answer and you're sent to their voicemail, leave a vague but intriguing message to increase the likelihood of getting a call back. For example, you may say, "Hey, this is [name]. Giving you a quick call. Shoot me a call back at [phone number]."

Email

When it comes to emailing prospects, automation is your best friend. According to WorkMarket's 2020 In(Sight) Report, 54 percent of employees say automation can save them up to two hours per day.

The key to successful cold email prospecting is to strike a balance between automated and personalized. According to HubSpot, 67 percent of buyers are influenced to accept a meeting when content is customized to their specific situation.

Your sales teams need to lock down the science of effective, personalized prospecting emails. We're here to help. The best thing you can do is segment your lists into groups of similar people and create custom templates that speak to each of those groups.

Step 1

Segment by persona

Using your B2B data provider, break down your lists by those with similar **titles, management levels,** and **functions**.

Let's start with segmenting by **title**. Your product or service likely caters to people of different job titles who use your product for different purposes, so market your product to them in the context of what they do every day.

"You're not going to talk to the director of finance about how you can help them generate more leads," says Dominique Catabay, manager of revenue generation at ZoomInfo.

Next, segment based on **management level**. Executives such as VPs and directors are going to have completely different needs than someone at the individual contributor level. For example, if you're selling a cybersecurity product, the manager of cybersecurity will care about implementation in addition to security, while the CIO will be mostly concerned about whether the product works.

Lastly, segment based on **function**. Some large companies have dozens—even hundreds—of employees with the same title. However, not every person with that title will share the same responsibilities and values. Try to gain an understanding of their goals and objectives so you can speak directly to them.

Step 2

Segment by firmographics

There are four primary characteristics to consider when segmenting based on account firmographics: **size, location, industry,** and **product fit.**

Size can refer to the number of employees in the company, the number of employees in a specific department, or even the company's annual revenue. Small businesses and enterprises don't operate in the same manner. The way a small business uses your product or service could be very different from how a small enterprise uses it. Tailor your message accordingly.

Location can have an impact on the language you use in your message—or even the message itself. For example, at ZoomInfo we generally sell data services. In the European Union and in California, there are a strict set of data privacy regulations in place—General Data Protection Regulation (GDPR) and California Consumer Privacy Action (CCPA). This changes the way we communicate with people in these regions. In our cold emails, we let prospects know that we are informed of these laws and explain how our product has value in their market.

When it comes to **industry**, there are many different aspects and regulations that affect the ways someone may use your product. For example, if you're selling to hospitals, the Health Insurance Portability and Accountability Act (HIPAA) is very important. If your cold email messaging isn't personalized to address HIPAA, your prospect may take that as a red flag.

Lastly, segment based on **product fit**. For example, you may want to identify who your prospect sells to in order to understand where your product or service fits into their bottom line. Or you may want to segment based on the fact that your product fits a specific department. Work with your team to figure out how you want to break out your product and service fits.

Emails are not one-size-fit-all. If you want to book a meeting, there needs to be a level of personalization. By filtering through your lists and creating multiple templates that speak to people of similar personas and company firmographics, you can leverage automation while still personalizing your approach.

Direct mail and gifts

While many may think this outreach tactic is antiquated, it still has its time and place.

Once you've booked a meeting with a strategic account, consider sending a gift ahead of time to increase your show rate and build rapport. It can be as simple as a $25 gift card with a message attached saying you're looking forward to talking and want to treat them to lunch.

Sending a gift is not only a goodwill gesture to your buyer, but it shows your appreciation for their future business. This approach is especially effective if you can send a gift that's tied to something you know about the prospect—like a gift card to their favorite restaurant, or a direct mailer containing their favorite dessert.

Once you're further along in the sales cycle (and especially when you're closing in on the end of a quarter or year), gifts can be used to shake loose accounts that need an extra push to close. Consider sweetening the deal by sending gift cards, a direct mail campaign, holiday cards, handwritten notes, buy one/get one offers, or a free 30-day trial.

Use this template when gifts seem appropriate:

Subject Line: *Have a meal on us*

Hey [first name],

We wanted to show our appreciation for your consideration of [your company name] for your [year] growth strategy!

Have lunch on us! We're looking forward to supporting your business with our [product] and have some end-of-quarter incentives running that would make finalizing a partnership before the end of the month beneficial for you.

Don't hesitate to reach out if there is anything we can do to support you in your evaluation and our potential partnership.

-[your company name] Team

Multithreading

Multithreading is the key ingredient to keeping a prospective account alive and engaged for the long haul.

The average opportunity has a buying committee of five stakeholders, meaning you have five different points of entry. You should establish relationships with as many key stakeholders as possible. In the event that your primary point of contact loses interest, leaves the company, or doesn't have the influence to get the deal across the finish line, you can turn to another cultivated contact.

Use your B2B contact data provider to identify and reach out to other director-level and higher stakeholders at the given account.

Conclusion

It's all about providing immediate value to the right people. Here are some final reminders for successful sales outreach:

Inbound leads

- The quicker you respond, the better.
- Start by asking the prospect why they're reaching out and why now.
- If the prospect doesn't pick up, put them into an automated email follow-up sequence.
- If they book the meeting but don't show up, reschedule.

Outbound leads:

- Research the prospect and the account before you call.
- Automate your emails—but make sure they're personalized to speak to persona and firmographics.
- Use direct mail and gifts for strategic accounts.
- Multithreading is essential to keep the prospect alive in the event something goes awry.

Happy prospecting!

Hit Your Number.

Want to accelerate your sales cycle, increase team-wide productivity and drive unprecedented revenue? Leverage ZoomInfo's go-to-market intelligence platform to identify, connect, and close deals that crush your targets.

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