

**Your company's Sales
Development**

PLAYBOOK

Getting Started

Your SDR Checklist - this would be a spreadsheet

Our Technology Stack - this is a visual representation of the tools your team will use

Our Values

- Whether you're buying or selling, the process shouldn't suck
- Always provide real answers to real questions (and real solutions to real problems)
- Understand the future but solve for now
- Insights should influence action

Your company Brand Voice Guidelines - this is a high-level overview of how you deliver certain messages to a prospect

Expectations:

Week 1: You have access to all tools, you have a rough understanding of who we are and who we sell to. You are able to get % on SDR assessment (Week 1).

Week 2: You understand *who* you should reach out to and have a better understanding of what we can offer to them. You are able to get >70% on the SDR assessment. You are able to give 2 elevator pitches on what we offer.

Week 3: You have 25+ accounts of your own and you are ready to start making calls and sharing our message. You should be looking to book 2 qual calls this week. You should be able to complete the 4 roleplays with Phil or Mike. You are able to recite our story.

Week 4: You have at least 50 accounts in your pipeline. You should be booking 3+ qual calls, and 1+ demo.

Week 5-10: You should be scheduling 4 qual calls and 2-3 demos per week. You have 600 claimed accounts by end of week 10.

Week 10-15: You should be scheduling 5+ qual calls and 3+ demos per week.

POST Ramp:

- **Monthly**
 - It is expected that all fully ramped SDRs will bring in 10 opps minimum each month.
 - SDRs should be aiming for 70-80% of their total opportunities to be outbound sourced.

- **Weekly**
 - SDRs should aim to schedule 5 demos per week.
 - An average of 3 demos per week is necessary to hit 10 opps.
- **Daily**
 - SDRs are expected to complete the following each day:
 - Calls >25
 - New Emails >20
 - New Prospects >10

Getting Started with Your company

Your company Overview

The Problem & The Solution

- Primary Problem: Customers are using the wrong type of data to identify prospects.

The majority of our customers sell a digital product (i.e. infrastructure, platform as a service, software as a service, etc) and are using firmographic data to identify prospects which is incompatible with the product they are trying to sell because it gives no context to how they use their infrastructure.

SOLUTION: We provide them with comprehensive data that maps a business's digital infrastructure. We are focused on the usage, adoption, spend, and deployment configuration of digital infrastructure. For examples, we can tell you what CDN infrastructure a company is using and HOW they are using it- that's the big insight.

- Secondary Problem: Customers need to prioritize their existing prospects.

SOLUTION: For companies that are more sophisticated, who are using multiple types of data and have a robust marketing infrastructure, Your company can help them prioritize based on the context of each prospects digital usage.

Identifying and Targeting Our ICP*

*ICP = Ideal Customer Profile

Industries

- Size/Desired Revenue
- Geography/Languages
- Industries
 - Companies that sell a digital product
 - Cloud Infrastructure
 - PaaS
 - SaaS
- Core Use Cases
 - Lead Qualification
 - Lead Scoring
 - Territory Planning
 - Market Sizing/Analysis/Share
 - Competitive Intelligence
 - Prioritize leads
 - Propensity of buy
 - ABM planning (Target Account planning)
 - ICP Development
 - Data Enrichment

Primary Buyer Personas

General Marketing

- Titles: Marketing Manager, Director of Marketing, Senior Director of Marketing, VP of Marketing
- Incentivized by: Variable is typically based on MQLs, and sometimes lower conversions such as demo request or form submissions
- Responsibilities: Lead Generation, Demand Gen, Account Based, Lead Scoring
- Challenges: Achieving lead quality, Alignment w/ sales, Finding new markets, Managing the MQL threshold, Delivering high value SQLs
- Positive Attributes: Think about making a company wide impact (vs achieving a quota like a sales rep), Generally open to new concepts, See value in having multiple providers, Maintain larger budgets, Stickier use cases

- Negative Attributes: Data integrity can be a big concern, Often have no control over Salesforce CRM
- Budget: Should be willing to spend 100K+ on data, Budgets are planned annually according to their fiscal year
- Use Cases: Lead Qualification, Territory Planning, Market Sizing/Analysis/Share, ABM Planning (Target account planning), ICP development
- Direct/Indirect Competitive Solutions: Intent data providers or predictive providers
- Value Propositions
 - Forecast markets and accounts by spend potential.
 - Prioritize opportunities by use case, renewal dates, or sales motions.
 - Engage prospects with actual insights, not discovery questions.
 - Enrich with relevant spend insights and tech data
 - Build account plans based on their use case and ability to purchase your product

Demand Gen

- Title: VP, Demand Gen, Demand Gen Manager, Director of Demand Gen, Growth Marketing
- Incentivized by: A combination of top of funnel lead gen and the correlate MQLs
- Responsibilities: Lead generation, Account based, Advertising
- Challenges: Lead quality, Revenue goals, Moving to account based, Aligning with sales, Adding new channels
- Positive Attributes: Must be data driven, Must evolve with market changes
- Negative Attributes: Might still see us as a list provider
- Budget: Should be willing to spend 100K+ on data
- Use Cases: Lead Qualification, Lead Scoring, ABM Planning (Target account planning), Lead Enrichment for Qualification and Scoring
- Direct/Indirect Competitive Solutions: Intent data providers or predictive providers

- Value Propositions
 - Target buyers with budget based on our insight into their current cloud footprint
 - Target buyers with a use case for your product
 - Identify buyers with propensity based on the current state of their cloud infrastructure
 - Know if a prospect has a use case or a need for your product before even talking to them

Marketing Ops

- Title: Marketing Ops, Revenue Ops, Account Based Marketing, ABM coordinator, Director of ABM
- Responsibilities: Marketing auto, tools, data integration, modeling, forecasting, Territory building, Account mapping, Market analysis
- Challenges: Understand market size, Market potential, Proving ROI, Account data, Systems integration
- Positive Attributes: Must be data driven, Evaluate data regularly, Evaluate new tools
- Budget: Should be willing to spend 100K+ on data
- Use Cases: Lead Scoring, ABM Planning (Target account planning), Lead Enrichment for Qualification and Scoring, ICP development
- Direct/Indirect Competitive Solutions: Intent data providers or predictive providers
- Value Propositions
 - Enrich cloud spend & tech adoption for advanced targeting
 - Market sizing based on the number of buyers and their potential to purchase your product
 - Identify under-served markets based on their infrastructure footprints

Strategy

- Title: Sales Strategy, Corporate Strategy, Marketing Strategy, Planning & Execution
- Responsibilities: Sales planning, Account planning, Market analysis
- Challenges: Sales planning, Territory mapping, Forecasting, Market analysis
- Budget: Should be willing to spend 100K+ on data

- Use Cases: Market Sizing/Analysis/Share, Territory Planning, ICP development, Competitive Intelligence
- Direct/Indirect Competitive Solutions: Intent data providers or predictive providers- HG Data/Pivotal IQ
- Value Propositions
 - Market sizing based on the number of buyers and their potential to purchase your product
 - Identify under-served markets based on their infrastructure footprints
 - Competitive analysis

Analytics/Data Science

- Title: Director of Analytics, Data Science Product Manager, Data Scientist, Head of Data Science, Data Strategy, Data Analyst, Data Sourcing Strategy
- Budget: Should be willing to spend 100K+ on data
- Use Cases: Market Sizing/Analysis/Share, ICP development, Competitive Intelligence
- Direct/Indirect Competitive Solutions: -HG Data/Pivotal IQ
- Value Propositions
 - Competitive Analysis

Sales Ops

- Title: VP of, Director of, Sales Ops Manager
- Common Responsibilities: Territory planning & assignment, CRM/Tools
- Negative Attributes: Will listen to the sales rep
- Budget: Limited to sales team budget, If a data use case will still need a sales rep use case
- Use Cases: Territory Planning, Market Sizing/Analysis/Share, Sales Enablement
- Direct/Indirect Competitive Solutions: Enrichment products
- Value Propositions
 - Territory planning & execution
 - Sales enablement

Secondary Buyer Personas

Sales Management

- Title: VP of Sales, Director, Sales Manager
- Incentivized By: Team Quota attainment
- Budget: Typically limited by rep and can only buy seat-based products
- Use Cases: Territory Planning, Sales Enablement
- Direct/Indirect Competitive Solutions: All sales tools set a price ceiling

End User Persona

Sales Rep

- Title: Account Executive, Account Manager, Business Development Rep, Sales Development Rep, SDR, Customer Growth (Google), Inside Sales
- Incentivized By: Attaining Quota
- Responsibilities: Green field prospecting, Named or Assigned accounts, Net new prospecting
- Challenges: Visibility into the clients actual technology needs, Accounts aren't ready to buy, Too many prospects are wasting their time
- Positive Attributes: Willing to try new tools, Loyal to tools that provide value
- Negative Attributes: Don't have budget, Will ask for a lot for free, Will make promises for free product in return
- Budget: NO BUDGET - ONLY EXIST AS FREE USERS

Titles on Deals We've Won

- This report shows individuals involved in the buying cycle from our current customer list. It is important to note their title because that explains their role in the buying process. You should keep this in mind when contacting these titles

moving forward (what information should you be trying to get out of who? And who you should avoid).

- Roles:

- Influencer - This individual may not necessarily be able to sign off on a new tool however they have the ear of individuals that can. With this person you will really want to probe for their pain. Once they are aware of how tedious the current process is, you can help them get a demo running for them and their higher-ups.
- Buyer- This individual would be the one to sign off on a new tool. They may be a user in addition. They will likely have set criteria for what they need to see in a tool so their requirements should be addressed as soon as they are involved in the buying cycle.
- User- This person will be able to tell you about the pain in the organization. If you are unable to get in contact with an influencer or buyer you can atleast get intel from this individual. Once you have a full picture you can try to ask for a referral or use that intel to send more compelling/targeted emails to the influencers/buyers.

Prospecting

Prospecting Tricks:

- Use “site search” to search a prospect’s website
 - site:URL will search only the URL
 - Example: site:Your company.com
 - This will search only our URL
 - Add in common frameworks for a quick search to see if they mention on their website whether they’re trying to comply
 - Example: site:marketo.com soc 2
- Looks for complementary software solutions and see if they list customers on their sites
 - Here’s an example from a SEIM company’s website:

Trusted by Thousands of Customers



-
- Looks at Financial Filings
 - First, any company filing with the SEC or NASDAQ is public and therefore needs to think about SOX
 - Second, a 10-k (annual financial report) may give you insight into infosec risk and compliance efforts
- Use Google’s Predictive Search
 - If you have a good prospect you can search: [Company] vs.
 - Google will suggest competitors.
 - This is a great way to leverage a good prospect to find other good prospects
- Does the company sell cloud services to other companies?
 - If so, what?
 - Does the company sell IT or cloud services to the Federal Government?

Salespersonship and Messaging

Arming Yourself for Success

Arming Yourself for Success

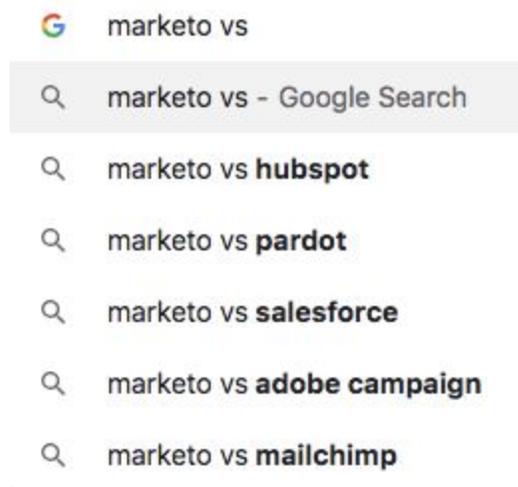
- Make it relevant
- Highlight value you can deliver to their organization
- CCP (Conversational, Concise, Provocative)
- Find Common Connections
- Include Social Proof (3 Companies)
- Test one of the formulas

Most important, you need to put yourself in the shoes of your prospect. They get 10s of emails and phone calls each week with people selling stuff. How are you going to rise above the noise?

Make it relevant...it starts with understanding their business

- What makes this a good fit for you to spend your time chasing them AND for them to take your call?
- The #1 thing you need to do is take a couple of minutes and do some quick research
 - Look at their website
 - Do they have a GDPR notification on the site?
 - If yes, GDPR is a concern
 - Do they accept payments on their site?
 - If yes, PCI is a concern
 - What else do you find? What information do they make readily available on their site about their security, compliance efforts?
 - Example page hosted by the company highlighting what they do for [trust and security](#)
 - Take time to understand their business
 - Are they B2B or B2C?
 - B2B
 - SOC 2 is probably something they worry about
 - Do a simple search for “[company name] Soc 2”
 - Here’s an [example](#). As mentioned above, notice how in in the search results there is a page hosted by the company highlighting what they do for [trust and security](#)
 - Do they look like they sell to the US government?
 - If yes, FedRamp may be a concern
 - B2C
 - What’s their business model?
 - If they’re selling stuff on their site, they’ll most likely care about PCI
 - Is the company in healthcare? If yes, HIPAA is a concern
 - Do a quick search on linkedin for:
 - Company name + “compliance,” “information security”

- How many people do they have in a role that fits one of our target personas?
 - Look at Individuals and their LinkedIn profile:
 - Security and compliance professionals change companies, on average, every 18 months
 - Look at their past companies
 - Do they list any of the frameworks we support?
 - Look for common connections
 - Look for current customers in their work history
 - Look at the associations they're members of, groups they belong to, or professional certifications they've achieved
 - ISACA
 - CISSP
- Competition
 - Are they in a crowded market? Certifications and a more robust program may be ways for them to differentiate themselves from the competition
 - Do a search for "[company name] and vs"
 - Example:



- - You can also do a quick look at G2 Crowd or Capterra to see who they're stacked up against
 - Are they a competitor to one of our customers or another opportunity in play?
 - Ask the AE who sold it about the use case.
 - NOTE: If you have success with a company, you should always look at their competition as additional prospects to target

Highlight Value You Can Deliver

- Now that you understand a bit more about their business, think about how that aligns with the persona you are targeting and what they'd care about.

- The formula is simple:
 - Who are you targeting?
 - What do I know and understand about their business?
 - What pain or issues will this cause them?
 - How can Your company help? How would Your company deliver value?

CCP

- Conversational
 - We are starting a conversation with another human - but this person isn't your friend, they're a future partner of yours.
 - Keep it professional, but keep it conversational and business casual.
 - We're at a cocktail party, not speaking to the queen of England. This is important for all channels of communication.
- Concise
 - Our attention spans are only getting shorter - making it even more important to keep messaging shorter rather than longer.
 - Same goes here, less is more, people get lost in the fluff.
 - Subject Lines: Keep them 3-4 words
 - Body Text
 - Keep your emails below 200 words
 - Have fewer than 20 lines of text
 - Check out this study: <https://blog.hubspot.com/sales/ideal-length-sales-email>
- Provocative
 - If you don't show enthusiasm for having the chance to provide value to their business, how are they supposed to have enthusiasm?
 - What Your company is doing is truly disruptive, and matches up perfectly with the vision of a modern compliance team
 - Be excited, get them excited - without this energy, it is nearly impossible to spark enough interest for a meeting.

Find Common Connections

- Questions to ask yourself
 - Did you graduate from the same school?
 - Did they work somewhere interesting?
 - Is there company located in a city you just traveled to/went to school/lived in?
 - Do you have mutual connections on LI?
- Respond to something
 - If you're following them on Twitter or LI, did they say or post something interesting?
 - Is there big news with their company?
 - Is there big news that they've shared about themselves or someone else (doesn't matter if its professional or personal news)?

- Has something timely recently happened in their industry?
- Do you use their products or services?
 - Often time, this is the best way to establish a connection and get a response - after all, we all want happy customers even if one of them is reaching out to introduce us to a new product or service.
- Use Data
 - “We’ve recently brought on a new customer in [your industry] and helped them reduce [pain point] by [metric].
 - Helped them reduce the amount of time spent on lead investigation by 30%

Include Social Proof

- List high value brands we’re working with (2 examples)
 - Examples: Snowflake
 - Include a competitor (1 example) if we have it

Test and Invest

- Test
 - Read this: <https://www.yesware.com/blog/cold-email/>
 - Try one of their email structures:
 - Before-After-Bridge (BAB)
 - Problem-Agitate-Solve (PAS)
 - But You Are Free
 - Star-Chain-Hook
 - Attention – Interest – Desire – Action (AIDA)
 - Star-Story-Solution
 - The Reader’s Digest Model
 - The 3-B Plan
 - Praise-Picture-Push (3P’s)
- Invest (your time in developing these skills)
 - <https://www.yesware.com/blog/>
 - <https://www.outreach.io/blog/category/outbound-sales-tips-and-tricks>
 - <https://blog.marketo.com/category/email-marketing>
 - <https://blog.hubspot.com/sales/sales-email-templates-guaranteed-to-get-a-response>
 - Find others and add them to this list

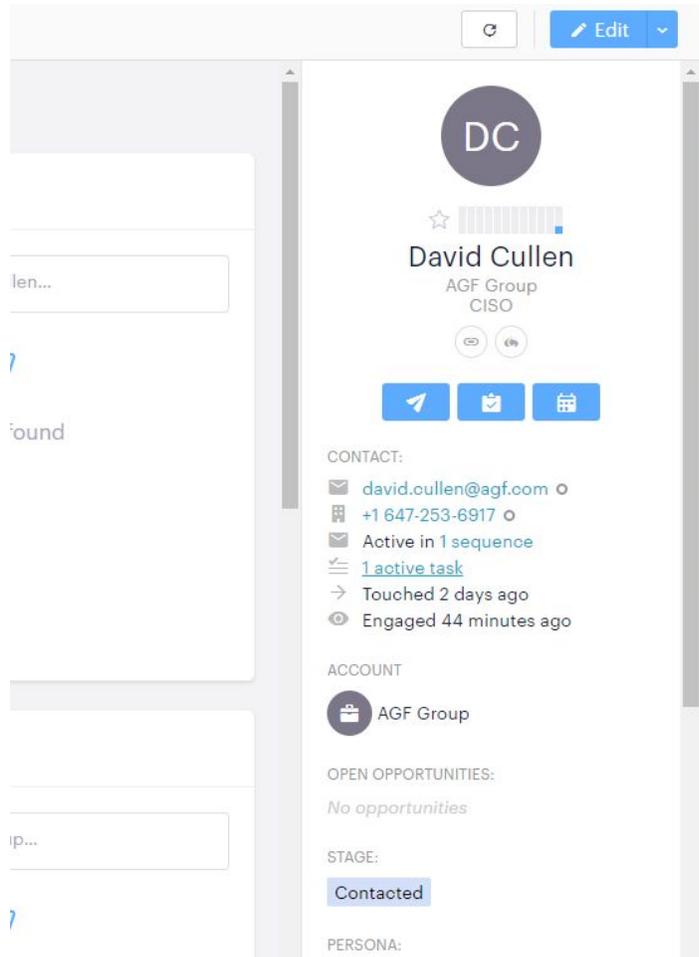
Email Messaging

Elements of a Good Sequence

- Should include 12-14 touches
- Mix up
 - Email
 - Social Touches:
 - LinkedIn: Follows and connections
 - Twitter: Follows
 - Phone
 - Use Outreach to tag accounts you should be calling regularly

Cold Calling

- Star Accounts in Outreach
 - While on a prospect page on Outreach, there's a star above the prospect name. Click on the star to add to your favorites.



len...

found

IP...

CONTACT:

- david.cullen@agf.com
- +1 647-253-6917
- Active in 1 sequence
- 1 active task
- Touched 2 days ago
- Engaged 44 minutes ago

ACCOUNT

- AGF Group

OPEN OPPORTUNITIES:

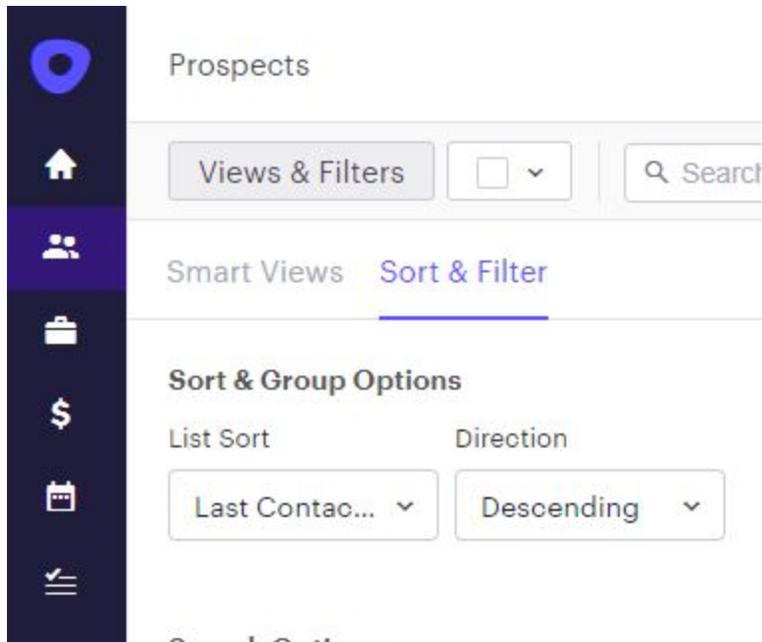
No opportunities

STAGE:

Contacted

PERSONA:

-
- To access your favorites list, click on the "prospects" button on the Outreach sidebar on the right.



Prospects

Views & Filters

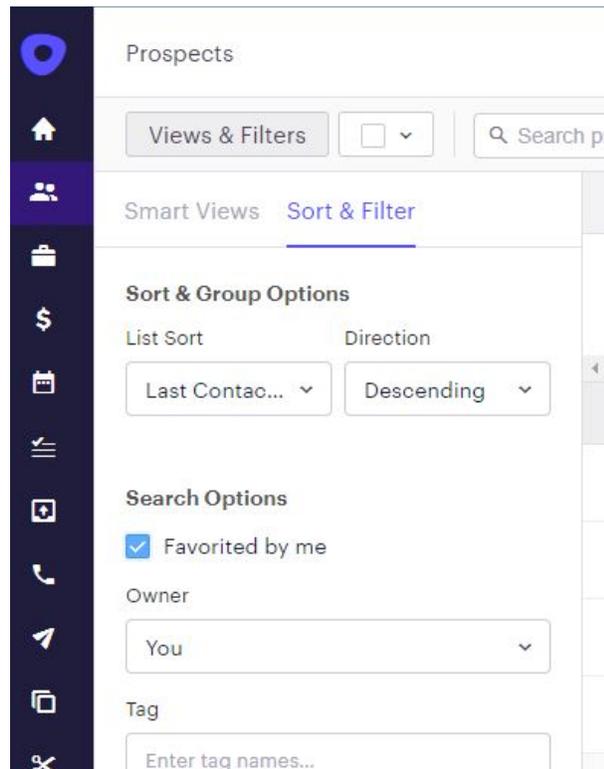
Smart Views Sort & Filter

Sort & Group Options

List Sort	Direction
Last Contac... ▾	Descending ▾

Search Options

- Then click on the box that says "Favorited by me" and all starred prospects will come up.



- Leave Voicemails - links to scripts for voicemails would be included here

- **Objections**

Nobody buys on the first call. When trying to overcome objections, the win isn't selling Your company - that's impossible via email/cold call - so don't even try. The win is overcoming their objections enough that they are willing to take a small next step: either a qualification call, or a demo.

If you can't overcome the objections and schedule a call/demo, the next best thing is to gather information that can be used to make sure that our next contact with them comes at the right time and is messaged properly.

- I don't need this.
 - *Example rebuttal:* Your competition just closed 741 new customers in the past two months. We not only can tell you who are good prospects for them and you, but we help accelerate that.
 - We need to create a need. The best way to do this is to explain to them that their competition is using this data and what they're able to do with it. Or here's what we can see they're doing with it if they're not actually using our products specifically.
- I already have a data tool:

Leveraging Social

Examples

Examples of prospecting emails sent to Jordan:

Higher Logic

Travis Brannigan <tbrannigan@higherlogic.com>

to me ▾

Hi Jordan,

Online communities are critical to customer success, **with research showing that over 50% of CX executives plan to adopt them in 2018.**

In this 30-minute webinar, Mark Ace "VP Client Relations" show examples of how Higher Logic communities can help your business:

- **Create business intelligence to better understand churn indicators**
- **Build meaningful relationships with customers to drive retention and advocacy**
- **Improve new customer onboarding and grow product adoption**

This webinar will take place on Thursday, July 26th at 2PM ET. [Register Here](#)

Travis Brannigan | Solutions Advisor

Direct: 571-932-3708



The Bad:

- Who is he selling to? CX exec vs. marketing
- Marketing cares about community, in fact, there's a lot of data that highlights the benefit of community to help build brand awareness and customer loyalty. None of this is mentioned.
- There's no social proof
- There's nothing to connect us, to build intrigue, or find some common ground.

More Visibility

Hi Jordan,

Are you confident your Digital Marketing Strategy is effective? [If not, we should talk.](#)

Every day the marketers I meet are faced with similar concerns about their Digital Marketing efforts. They each:

- Want to improve Organic results
- Are trying to create better content to keep pace with users and search engines
- Have difficulty knowing what's "working" aside from last-click attribution models
- Wonder "what else" they should be doing to reach and engage their target audience(s)

If you find yourself feeling the same, I invite you to request a [Complimentary Digital Marketing Consultation](#) from the MoreVisibility team.

We'll take the time to understand your goals, audiences, challenges, and current strategy and collaborate to create a roadmap for success.

I look forward to hearing from you,

Khrysti

Khrysti Nazzaro

Vice President, Brand Strategy

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Leaders in Search, Design
& Interactive Marketing

The Bad

- Nothing about our company
- Generic value props
- In three seconds, she could have found out that we run Google Adwords ads and, by the number of pages on our site, that we are focused on SEO.
- Weak call to action
- No social proof (esp. Important since agencies are commodotized)

Examples from our SDRs:

A Target Account

URL: www.targetaccount.com

INSERT NAME,

Given the mounting Infosec related risks leading retail brands face, and the challenges associated with managing a global program, I thought it would be valuable for us to connect.

We have a tool called Your company that's helping companies like Walmart, Apple, and [insert 3rd retailer] more effectively solve this problem and that problem and get off of spreadsheets for good.

I'd love to see if we can help A Target Accounts. Do you have 5-10 mins this week to chat?

NextDoor

What do we know about Nextdoor?

- A quick search for "how does nextdoor make money" brings up [this page](#)
 - They're global: US, UK, Netherlands
 - UK and Netherlands are GDPR territory
 - They're selling ads; advertisers need a way to pay them (ie, credit cards)
 - They probably care about PCI
 - They've raised \$200MM
 - They're a part of the bay area tech community. We have great referenceable customers, which we do a good job highlighting
 - Even better, a quick search on Crunchbase tells us that their investors are: Redpoint, Kleiner Perkins, Comcast Ventures, Shasta Ventures, Insight Venture Partners, Benchmark, Meritech, Valor, Tiger Global, Slow Ventures.
 - Take the first firm: <https://www.redpoint.com/companies/>
 - We have multiple customers on this list
 - If you looked at the other firms, you'd probably have the same overlap.
 - Growth Company/Part of the startup community
 - Typically resource constrained
 - Probably trying to get their house in order
 - More open to discussing "an exciting new technology"
 - Takeaways
 - Technology, especially Bay Area tech scene
 - They are doing (at least) PCI, GDPR
 - We have customers that they share investors with
 - We're helping a lot of companies like them: growth stage startup
 - How might you change the email?
 - Here's one idea:

Nehal,

I've been a user of NextDoor for ~3 years and following the company for quite some time. It's a great service to the community.

I'm with Your company and we're working with quite of a few of your sister portfolio companies (Name, Name, Name) helping them better manage risk and compliance. As an example, our solution can help reduce the time to this task and that task by as much as 94%

From my research, it looks like your team is managing this and that, and maybe more. Do you have 5-10 minutes to discuss how we may be able to deliver value?

The Sales Development Process

Inbound Follow-up Process

Your company generates new sales opportunities through a variety of marketing channels, such as Google AdWords, Webinars, LinkedIn Sponsored Updates, SEO, Capterra, etc. These sources drive traffic to the website and various landing pages. Interested prospects "raise their hands" by requesting a demo, downloading a piece of content, or participating in an event (i.e. Webinar). Inbound leads are assigned Round Robin via Salesforce. In the case of extended vacation or sickness, SDR will be excluded from Inbound lead round robin.

Inbound leads should be converted into contacts as soon as the lead has been verified. If you can confirm the person (via phone, email, linkedin, etc.) and you plan to continue to reach out to them, **you should convert them into a contact, create an account (if one does not already exist), and claim the account.** This is to ensure everyone is working the number of accounts that they have claimed and that all activity is tracking on the account level.

Types:

- a. **Demo Requests:** A Demo Request is the highest value inbound lead we receive as it is the most likely to convert to an opportunity/sale quickly. For this reason, it is critical that we follow up with inbound demo requests with immediate phone call.
 - i. Demo requests are considered Tier 1 leads and should be followed up on within 30 minutes. In the case where these are received after business hours, it is expected that the SDR will follow up promptly the following business day.
 - ii. Pardot will automatically send an email out to the prospect on your behalf when they complete the form. If they respond via email before you have a chance to make a call, proceed appropriately.
 - iii. Once you receive notification of the demo request, you should put it into the Inbound sequence in Outreach.
 1. When calling prospect:

- a. Unavailable:
 - i. Voicemail: Leave voicemail stating that that you were notified that they were interested in seeing a demo of Your company and wanted to get that set up.
 - b. Gatekeeper: If you reach gatekeeper who says prospect is out of office, try to find out when they will be back in the office. Be sure to leave a voicemail if that is available. (See above for voicemail).
 - c. Available: If prospect does pick up, tell them that you were notified that they were interested in seeing a demo of Your company. Start going through your qualification questions to make sure they will benefit from a demo of Your company. If they push for the demo, tell them we offer a customized demo so it is in their best interest to answer a few questions prior to the demo being run.
- iv. After the Inbound Sequence ends the prospect will be automatically enrolled in a Nurture campaign after 14 days. They will then be put in a marketing drip campaign until they reply back again that they're interested in a demo.
- v. If you wish to pursue other contacts at that company, feel free to put them on an Outbound sequence and continue to work that account.
- b. **Whitepapers/eBooks/Webinar Registrants & Attendees:** A whitepaper request or a webinar registrant/attendee is the next highest value inbound lead we receive; They have shown interest in us however they have not yet requested a demo.
 - i. When you receive an alert that someone has downloaded a whitepaper or registered for a webinar, follow up with a phone call during business hours with 24 hours. If the lead comes in outside of business hours, follow up with a phone call after you've followed up on your inbound demo requests. Finally, if you are unable to reach the lead over the phone within 24 hours. Call back the next day and try again.
 - ii. You should add this prospect to the corresponding Inbound Sequence.
- 2. If you are unable to book a qual call before the inbound sequence ends you can decide based on the quality of the lead if you want to pursue it further or let marketing nurture it. After 14 days without a qual call or demo being set, the prospect will be enrolled in a Nurture campaign.

Lead Statuses:

Lead Status: Once you have verified the inbound lead is a real person at a real company, you need to convert the lead to a contact. From there you need to update the lead status accordingly:

- i.

Open	Default lead status
Contacted	Contact has been enrolled in an Outreach Sequence
Responded	Contact has replied to an outreach sequence
MQL	A new demo request or other marketing qualified lead
Demo Scheduled	A demo has been scheduled
Call Booked	A qualification call has been booked. A rep creates a qual call event (Removes lead from automated emails)
Nurture	Contact has reached the end of an outreach sequence (automated) and they should be “nurtured” by routine marketing emails
Bad Contact Info	Bounced or bad number
Not Interested	Contact has said no. We blacklist them.
Do not contact	Contact has said do not reach out to me at all.
Unqualified	Bad fit for working with Your company

- a. If the lead is unqualified, meaning it is not a real person at a real company or if you discover that they are not someone we would ever want to work with, please change the lead status to unqualified. You do not need to continue pursuing unqualified leads beyond your initial outreach.

Outbound Process

Your company generates the majority of our opportunities from outbound prospecting. Outbound prospecting is only beneficial if we ensure our targeting (right title & right company) is accurate. Please use the prospecting information in the sections above to ensure you are reaching out to the proper accounts and prospects.

Claiming accounts:

An SDR is able to claim up to 600 accounts at any given time. This includes all companies that they are working (inbound and outbound). To work an account you must claim the account by selecting “claim account” on the account page. If you are working a lead and an account does not exist, **you must convert the lead to a contact and create an account.**

Asos

Customize Page | Edit Layout | Printable View | Help for

Show Feed

Back to List: Users

Contacts (9) | Opportunities (9) | Open Activities (9) | Activity History (9) | Google Docs, Notes, & Attachments (0) | Cases (0) | Leads (9) | Opportunities (9) | Account History (3)

Account Detail Edit Delete **Claim Account**

Account Name	Asos [View Hierarchy]	Account Owner	Joe Atkins [Change]
Type		Customer Success Manager	
Website	http://www.asos.com	Parent Account	
Description	Asos is a British online fashion and beauty store. Primarily aimed at young adults, Asos sells over 850 brands as well as its own range of clothing and accessories. Asos currently ships to more than 241 countries and territories worldwide. The company is headquartered in Camden, North London and operates additional offices in New York (US), Sydney (Australia), Berlin (Germany), and Shanghai (China) as well as a 24/7 customer care office in	Phone	+44-2077-561000

◆ Before you claim an account:

- Check account type- you should only be working:
 - enterprise - prospect
 - consultant - prospect.
 - If the field is blank, please update to enterprise - prospect and proceed.

Show Feed

Back to List: Users

Contacts (9) | Opportunities (2) | Open Activities (2) | Activity History (10+) | Google Docs, Notes, & Attachments (6) | Cases (0) | Leads (0) | Opportunities (0) | Account History (4)

Account Detail Edit Delete Claim Account

Account Name	Beeline [View Hierarchy]	Account Owner	Ben Lack [Change]
Type	Enterprise - Customer	Customer Success Manager	Amanda Laronge
Website	https://www.beeline.com	Parent Account	
Description	This is an existing customer (merged with IQNavigator).	Phone	+1 303-563-1500
Company Size	201-500	Industry	Technology
Year Founded	Before 2005	Amount	

- Please check to see if account:
 - Type
 - Has had any activity in the last 90 days in Salesforce
 - Has had any activity in the last 90 days in Outreach
 - Has an open Opportunity
 - ^if any of the following are true, this account is not fair game. Contact Phil or Mike with any questions.

Metrics

- ◆ Every day you should prospect 15-20 new accounts.
- ◆ You should target working 32 new leads (2-3 from each company) each day.
- ◆ **Adding companies to SFDC and sequences in Outreach**
 - a. Once you find a company that is not claimed you will want to look them up on LinkedIn to find which prospects you will reach out to.

- b. The two easiest titles to search for are “security” and “compliance”. That search should bring up the most relevant employees for us to reach out to.
- c. You can also search for IT, information security, it compliance, compliance risk, grc, audit, cloud, individual frameworks, or anything else you can come up with. But, always start with the basic “security” and then “compliance”
- d. Add those 2-3 best prospects to prospect to the sequence provided to you by Phil or Mike.

Qual Calls

- You catch someone on the phone and you are able to ask them a few probing questions to detect that pain is present. You are ready to offer them a qualification call. If you are ramping you should schedule this with one of the more senior SDRs to help you out. To set up a qualification call you need to make sure that they’re qualified before passing them onto an AE for a demo. Ideally, we can gather enough information so that the AE can conduct a demo that meets the needs of the prospect. This includes:
 - ◆ **What type of work are they doing today?**
 - For example, is it Customer Success (CS) related? Or something else?
 - ◆ **Can we help them?**
 - Phrased as “Are you planning to do x,y,z?”
 - We want to work with companies like you - if someone is doing import/export compliance or HR compliance, this is probably not an opportunity we can support.
 - You may need to get an intro to their INSERT C/VP LEVEL EXEC or similar
 - ◆ **How are they doing it today?**
 - Do they have a tool?
 - ◆ **What tools are they using?**
 - If they have a tool, you need to understand which departments are using it, how long have they had it - essentially, can you get them to switch, or are they just kicking tires?
 - If you’re speaking to a new VP, they want and be able to pull an existing solution out for something better. If it’s an analyst who has been there for 10 years, it’ll be much harder
 - What other cloud tools do they use? Sharepoint? Google Apps? Box? Dropbox? OKTA? etc.
 - ◆ **What is their role**
 - Understand who the decision maker(s) is and who holds the budget. Is it them or their boss? Or someone else?
 - ◆ **Their interest in looking for a new solution**
 - No matter what they’re using, you should try to understand their timeline. If they’re using spreadsheets and they’re high level, it’s worth giving them a demo.

Booking the Qual Call:

If you are not able to fully qualify the prospect while on the phone with them, you should book a qual call. You need to log this in SFDC as follows.

- A. Click "New event"
- B. Subject = qual call
- C. Date you scheduled the qual call
- D. Assigned to you
- E. Type = meeting

The screenshot shows the 'Qual Call' event details in Salesforce. At the top, it says 'Calendar Event' and 'Qual Call'. There are navigation buttons like 'Show Feed' and 'Back to List: Users'. The event is assigned to 'Saleem Musazay' and is a 'Meeting' type. The start time is 2/18/2019 10:00 AM and the end time is 2/18/2019 10:15 AM. There are buttons for 'Edit', 'Delete', 'Create Follow-Up Task', 'Create Follow-Up Event', and 'Export Event'. The 'Related To' section shows it is related to 'Lance Harris'. The 'System Information' section shows it was created and last modified by 'Saleem Musazay' on 1/29/2019 10:58 AM. A reminder is set for 15 minutes.

You need to also book this in your calendar .

- Subject: Your company <> (Company Name)
- Location: Include your Zoomlink
- Body: Hi (First Name). I look forward to continuing our discussion Date & Time to discuss if Your company can help with your compliance needs. Best, (Your Name)

The Qual Call:

Your goal is get as much relevant information for the account executive as possible.

Here is a list of questions to ask during the qual call. Your notes should be typed up in this format. You will need to add these to the notes section on your contact in SFDC.

The screenshot shows the 'Google Docs, Notes, & Attachments' section in Salesforce. It has buttons for 'Add Google Do...', 'New Note', and 'Attach File'. The 'New Note' button is circled in orange. Below the buttons, it says 'No records to display'. There are also navigation links for 'Open Activities (1)', 'Activity History (1)', 'Opportunities (0)', 'Campaign History (0)', and 'Contact History'.

Note Edit Save Cancel

Note Information

Private

Title

Body

Pete Nicoletti - Cybraics

Who they are
<https://cybraics.com/>
Pete is the CISO
Former CISO of Hertz
Former Archer user
Said "there's no way in hell" they're implementing it
Beth Morgan also joining
https://www.linkedin.com/sales/profile/ACwAAADAskEBHWNvFGCFkmAL-jRy-O2bg3BvXYk,qI4p,NAME_SEARCH?trk=d_sales2_nav_typeahead_entitysuggestion
What they're doing/How they're doing it
Using spreadsheets right now to manage compliance
Still an immature system
Looking at NIST 800-53
They have a bunch of federal customers
A lot of healthcare providers as well so looking at HIPAA
Done internal assessment against NIST

2

Save Cancel

After the call:

If the call goes well you should determine what queue it should go into. If you are ramping, please make sure you ask your partner to help you decide. The criteria can be [found here](#).

You should assign it to the next AE in line in the corresponding queue.

You will then want to update the lead status to Demo Scheduled, Create a new calendar event in SFDC, and send over a new calendar link.

If the call was unsuccessful either choose to follow-up with the prospect (Reengage sequence or let it be auto enrolled into a Nurture campaign (14 days no activity)).

Demos:

When scheduling the demo you need to make sure the calendar invitation includes your AE's zoom meeting link. That allows them to control the meeting/share etc. Once you have added the zoom link you should format the rest of the invite link like this:

Subject: Your company Demo

Body: Hi (prospect name), My colleague (AE name) will be taking the time to walk you through Your company on (date and time). During this time (he/she) will go over (list concerns/requirements) addressed on qual call). If anything comes up before the demo please let me know and I will be happy to reschedule.

You need to create a 2nd calendar event for the AE to reserve the conference room for them. You should book the room 5 minutes before the demo is supposed to take place (ex. 2:00pm demo, book room for 1:55pm-3pm).

You need to also track the demo in SFDC if it is a LIVE demo. If it is a training demo, log it as a qual call. You should update lead status to Demo Scheduled. You need to also create the event:

- a. New event
 - B. subject = demo
 - C. date of the demo
 - D. assigned to the correct AE
 - E. type = demo scheduled

The screenshot shows a Salesforce interface for a 'Calendar Event' titled 'Demo'. At the top right, there is an 'Edit Lead' link. Below the title, there is a 'Show Feed' button and a navigation bar with icons for users, a calendar, and a list view. A 'Back to List: Users' link is visible. The main content area is titled 'Event Detail' and includes several sections:

- Event Detail:** Contains buttons for 'Edit', 'Delete', 'Create Follow-Up Task', 'Create Follow-Up Event', and 'Export Event'. There is also an 'Attachments (0)' link.
- Calendar Details:** A table with the following information:

Subject	Demo	Assigned To	Ryan McCabe
Location		Type	Demo Scheduled
Start	1/30/2019 9:30 AM	Check Availability	
End	1/30/2019 10:30 AM		
Description			
Score at Creation			
Event Resolution			
- Related To:** A table showing:

Name	Allen Sorbie	Related To	Vertex Group
------	--------------	------------	--------------
- System Information:** A table showing:

Created By	Ryan McCabe, 1/29/2019 10:31 AM	Last Modified By	Ryan McCabe, 1/29/2019 10:31 AM
------------	---------------------------------	------------------	---------------------------------
- Reminder:** A table showing:

Reminder	<input checked="" type="checkbox"/> 15 minutes
----------	------------------------------------------------

You will also need to assign this to an AE in one of the two queues (Live or Training). The queues go in alphabetical order unless otherwise specified in the queue.

After the demo:

You should check in with your account executive to find out how the demo went. If it went well and meets the opportunity criteria, then the AE should create an opportunity for you within 24 hours. If the demo went poorly, you will have 7 days to reschedule before marketing will begin to Nurture the lead. You need to update the demo event with the proper demo resolution:

- No show
- Rescheduled (once you have a new date set)
- Qualified (opp is being created)

- Not Qualified (no opp, you can either try to find a new contact or allow it to be Nurtured by marketing)

Resources

Subscribe to these, visit them regularly, invest in yourself and your craft!

- Informative Articles
 - [55 Tips and Tricks for SDRs in 2019](#)
 - [Active Listening](#)
- Blogs to check out
 - <https://www.yesware.com/blog/>
 - <https://www.gong.io/blog/>
 - <https://www.asalesguy.com/morgan-ingram-sdr-extraordinaire/>
 - <https://jbarrows.com/blog/>
 - <https://salesfolk.com/blog/>
 - <https://www.outreach.io/blog>
 - <https://salesloft.com/resources/blog/>
 - <https://discoverorg.com/blog/>
- Other Resources
 - <https://www.cbinsights.com/> - look for reports on specific industries or sectors.
Great for building lists of lookalike companies
 - <https://pitchbook.com/news> - look for reports on specific industries or sectors.
Great for building lists of lookalike companies
 - www.Crunchbase.com
 - LinkedIn.com company pages
- Google Alerts
 - Google alerts set for the following keywords:
 - INSERT RELEVANT KEYWORDS

Definitions

INSERT ANY DEFINITIONS AN SDR IS GOING TO NEED TO KNOW ABOUT THE INDUSTRY AND/OR THE PRODUCT