

# Sales Prospecting Framework

## Preparation

- Who are we talking to?
- What have we already learned about them?
- What are we talking about?
- Why should they participate in conversation with us?
- What is our call objective & call to action toward the **Yes, No, Later & Why?**

## Structure

- Work in intervals up to 90 minutes only on prospecting
- Prioritize activity planning i.e. open deal follow-ups first, cold calls last
- Track & measure activity outcomes. Become proficient in narrative summarization to help synthesize call outcome and email response feedback trends; Practice progressive A/B testing to improve results.

## Resourcefulness

- Setup topic-aligned Google Alerts and review once per week for situational awareness and conversation starters
- Read your prospect's LinkedIn profile for conversation starters & presumptive statements (*common interests, groups and education / degrees are good ice-breakers*)
- Find and ask their opinion about a recent, related industry / sector or topic newsworthy event

## Ingenuity & Creativity

- If you get an automated phone tree that doesn't list the name of your prospect, try to select a common name like 'Smith and act surprised when they answer ex: *'I was calling <name of your prospect>, not sure how I got your extension, can you help me out?'*

- Find the name of a peer or manager that the prospect may know; drop the name in early opener ex: *'I had considered reaching out to <name> but then I thought you're probably the one who gets stuff done so I'm glad we connected'*.
- Come right out with it ex: *'...I like that you <example from their LinkedIn profile / what you personally know or presume about the prospect> and, fully transparent, my company is very interested in talking with you about <problem / solution>. So this is a cold call - will you share a few minutes with me to see if we can help one another?'*

## A - Email Opener

### Sequence Start: Send Intro email 1

- If opened > Warm Intro Call 1 business day following open
- If unopened > Send Intro email 2 at 2 business days following Intro email 1
- If email 2 opened > Warm Intro Call 1 business day following open
- If email 2 unopened > Send LinkedIn connect request (**personalized**)
- If LinkedIn connect request accepted > Warm Intro Call for 1 business day following connection
- If LinkedIn connect request not accepted > Cold Intro Call

### Intro email 1

Subject: <Contact first name>, introducing <<My Company>>

Hi {{contact.firstname}},

When considering <key problem area, how it impacts>, are you <currently or considering> to <evaluate, change, improve, add-on etc.>?

If so, please give <<My Company>> a quick look. We've created a <summary platform / solution description> that could be <a great fit, benefit, useful for XY> to help you <intended value / ROI of the platform / solution>.

I'll follow up with a call in a few days to answer any questions you might have. If this is something you'd like to explore sooner, <CTA and/or asset such as: schedule a call here (meeting link), I'll be glad to send you a case study, data sheet etc.>

Thanks in advance for your consideration. Have a great day.

<Sales Rep sig block w/links to website and social profile(s)>

## Intro email 2

Subject: <<My Company>>. <5 word max power statement>.

Hi {{contact.firstname}},

Have you had a chance to check out <<My Company>>?

I wanted to make sure you knew about our <summary platform / solution description> in case <solving / addressing the specific issue> is <in your field of view, on your roadmap, a current initiative, etc>.

I'll follow up with you in a few days to answer any questions you may have.

Thanks for your consideration, I look forward to your reply either way.

<Sales Rep sig block w/links to website and social profile(s)>

## B - Phone Call Opener

### Sequence Start: Call 1

- Voicemail / live message > Send Pursuit 1 email & send LinkedIn connect request
- No reply after 2 days > Send Pursuit 2 email
- No reply after 3 days > Call 2
- No reply after 5 days > Send Pursuit 3 email
- No reply after 3 days > Change lead status to No Response

### Pursuit 1 email

Subject: <Contact first name>, follow up from <<My Company>>

Hi {{contact.firstname}},

Just called and left a message for you to introduce <<My Company>>.

[placeholder overview, opener HIGH LEVEL]

[set the stage]

- Proof point 1
- Proof point 2
- Proof Point 3

[CTA question & Action: i.e. schedule time on calendar or call, and why they should join / what they get].

Thank you, I look forward to talking with you soon.

<Sales Rep Sig Block w/links to website and social profile(s)>

## Pursuit 2 email

Subject: <Contact first name>, can we help you [solve / improve]?

Hi {{contact.firstname}},

As a [role/title/function] expert you're [dealing with, looking at, considering, challenged with etc.].

<<My Company>> [does this, for these customers, with this outcome]. If we could achieve those results for you, would you be willing to take a few minutes with me on a call to see if there's a fit?

Here's a link to my calendar or you can call me at NUMBER.

Thanks, I look forward to hearing from you soon.

<Sales Rep Sig Block w/links to website and social profile(s)>



## Pursuit 3 email

Subject: <Contact first name>, are you [in this role, looking at issue/problem, dealing with situation, etc.]?

Hello {{contact.firstname}},

I've tried to reach you about [challenge / problem / solution topic].

As a refresher, <<My Company>> is [elevator pitch]. [We do this, for them, that makes this better / solves this problem, resulting in this better outcome].

As you know, this is a common [problem, need, situation] in your [role, function, industry]. Would you please share your perspective on this, and where it sits on your priority scale at the moment?

I appreciate your consideration and look forward to the courtesy of your reply either way.

Thanks,

<Sales Rep Sig Block w/links to website and social profile(s)>

## Phone Dialog Framework

Hi [Contact First Name], this is [Rep First Name] with <<My Company>>.

[Transition / Why do you ask / What is this about?] - A brief discussion about how your company is [solving, dealing with, actively undertaking, etc].

Our platform/product/solution [7-10 word elevator pitch]. We work with [customer types / cases] to [deliver / improve / solve]. If we could do that for your business as well, would it make sense to spend a few minutes now to discuss the possibilities together?

## OPENERS

- Placeholder statement 1
- Placeholder statement 2
- Placeholder statement 3

[NOT MY ROLE / SPEAK TO SOMEONE ELSE] - I understand. Who do you suggest I speak with instead?

[ENGAGED] - Confirm top of funnel 'must-have's':

- Qualifier 1
- Qualifier 2
- Qualifier 3

## DISCOVERY

- D1
- D2
- D3
- D4
- D5

## KEY DISCUSSION POINTS

- Only <<My Company>> [does / is / will / UVP placeholder].
- We come from the [industry / segment placeholder] world. We learned [experience / IP / advantage] from [provable history].
- We are [who / what / why].

## REFERENCE CUSTOMERS

• Customer Name / Use Case
• Customer Name / Use Case
• Customer Name / Use Case
• Customer Name / Use Case
• Customer Name / Use Case

## CALL TO ACTION

- Set Demo Appointment
- Propose Trial/POC

## VOICEMAIL

### > VM1

Hi [Contact First Name], this is [Rep First Name] with <<My Company>> at <NUMBER>. I'll follow up with a brief email about [topic] to preface our discussion.

Again this is [Rep First Name] with <<My Company>> at <NUMBER>. Thanks, I look forward to speaking with you soon.

### > VM2

Hi [Contact First Name], this is [Rep First Name] with <<My Company>>. Please reply to my previous messages or call me at <NUMBER>.



To refresh your memory, we [provide / deliver this for that, for who, resulting in what].

Thanks for your consideration. I look forward to hearing from you soon.