https://docs.google.com/spreadsheets/d/1x8OQEJVrNbuGPAICLvzZTdJ0DYWZ9b2XmgGuGRdk0LI/edit?gid=122147997#gid=122147997

Class 1
https://joinpavilion.zoom.us/rec/play/JZd5DbeWtw67tb8BnKFqYTNeU9OWnzq31174ImpF6u5rPMT00jjxkXclOC7aEkRpQ7r3zkrOydzd1PIM.cJnBFHLDqah4S8IC?eagerLoadZvaPages=sidemenu.billing.plan_management&accessLevel=meeting&canPlayFromShare=true&from=share_recording_detail&continueMode=true&componentName=rec-play&originRequestUrl=https%3A%2F%2Fjoinpavilion.zoom.us%2Frec%2Fshare%2FMYHhBVDfb0qwq4iaIC4srFIoHWNx2N1FAJAHr_AswhagP6HtHqdTDaRduw7BTjRV.JFuYO63xd6Gm2L0m
https://docs.google.com/presentation/d/1aH3RZv8uIuSTUaDaQoFAdo8nTE8Ib_EAYTC0jUw-n-I/edit

Class 2
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https://docs.google.com/presentation/d/17LIZqIWXckeb931YOHkyMb9djQsZGM4b_PkYRJg9COA/edit?slide=id.gdf6d8df013_2_103#slide=id.gdf6d8df013_2_103

Class 3
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https://docs.google.com/presentation/d/11NwpPpkTbCuwZAHijXCZv28Bh7sSEFF37YY5sYoTjzs/edit?slide=id.gdf6d8df013_2_103#slide=id.gdf6d8df013_2_103

Class 1
Okay, so let's do pull number one condo dog pictures right oh i've heard if if my dog runs bile all grabber but she's she's single and that's yeah let's do pulling into one so first of all I do want to find out from the crew here.
Who is very familiar with sales engagements or is using it has used it, you know let's let's just find out what's your what your understanding of that is today.
Okay, so a lot of outreach or sales loft grooves smaller other than Okay, then a good percentage was not using sales and legion today.
Okay, keep going right we're not quite fully participated yet we'll keep going.
OK OK cool so it's not surprising outreach and sales loft are by far the most utilized sales engagement platforms, just as i'm looking at this live poll.

Certainly some of you are not using any sort of sales engagements Nice that at least those of you who are not are using some sort of CRM.
So again, a lot of the principles that i'll share here will still apply and CRM things just might be a little bit less automated.
A little bit more manual this won't be a sales pitch on using sales engagement, but I just want to I pull up this data, and this is a actually a year and a half old from a year and a half old reports.
Most sales development teams have like prospecting teams today are using sales engagement.
If you're in a tea or some of these other roles they may not be as prevalent, but this is something that is used very, very heavily and it's because it's solve certain problems that are really.
Important to solve for sd ours, so the the thing to take away from you, who are using sales engagement, or who are not.
Is the implication of people using sales engagement means that they can scale the emails that they send.
It can scale the phone calls that they make, and they can more easily scale, you know, the amount of social touches on Dan or.
direct mail that they're using literally any way that I can possibly go after someone there is more noise because of sales engagement both the good and bad of sales pitch.
So most are not using this technology well, which is nice for all of you, you can break through by just mastering some some some things here.
But those who are not using sales engagement just need to recognize that hey you may not have this machine gun you've got you know, a pistol or a site, or something, and you just need to be more targeted more careful with the way that you're going.
After your folks because you can't get the volume games easily so so sales engagement so good we're going to use the principles behind why sales engagement was important in the first place.
So today's agenda we're going to focus on so let's see do we want to do um let's do a poll to also i'm interested in just those this is going to be more applicable to those using sales engagement want to find out how good you think you are.
Again, sorry for those of you who are not using it, I promise, this will be relevant, but there, there will be portions of this that a little more focused on Sep users.
Okay cool beginner experts product reviews this thing for a while you're very familiar with a lot of this was a few people in the workplace, we Jordan you're managing the waiting room.
Okay it's Okay, and I also love, by the way the.
chats in here i'm not going to monitor the chat super super well here but big fans of you answering each other's questions truly like I think i've got enough things i'm looking at here that I would love.
any of you to answer each other's questions or again come off mute if you've got questions regret, but okay cool.
um alright, so what we're going to focus on is just kind of overview on what the kind of the principles of sales engagement are in the first place, what, what are the problems it's solving and.
What do you need to solve, for if you're not using in sales engagement like what do you need to kind of find the path to solve for.

And then we're going to focus a lot on predictable I kind of creating predictable pipeline, and I would say the math of outbound prospecting so you are going to do some some pretty basic math today.
And then, in the next two sessions, the next to.
Like next week and the week after we're going to get far more tactical and then the leads i'm going to spend more time in these products, so that you can see, and watch how they're how they're used.
Again, those of you who are using CRM or even spreadsheets I promise you'll still get value out of it.
And you know you'll you'll kind of see what what other people are using how it can apply you you just might have again a more manual approach of.
Building columns into spreadsheets or or using different tasks in salesforce or CRM to manage some of your workflows.
But today, is going to be a little bit more of the overview on how to develop your final how to look and understand your funnel so that you can plan and organize your day in a way that sets you up for success.
So.
Why is sales engagement necessary in the first place, like what is really, really hard for a lot of you.
And and it's hard for every str specially as things are more remote now is starting and just trying to figure out what do I do like what email do I send what process, do I follow.
For those with the sales engagement or relatively rigorous processes within their CRM.
The process for hey here's the ideal way that I want to go after somebody in a specific situation is documented put into a system now I am in many cases, it can be automated.
Even if the tasks themselves are not automated the process in the movement through your process to go contact someone is is on.
You also.
ensures you never miss follow somebody right here, decide number two is huge, this is so big and again sales engagement makes this easier for those of you who are not using sales engagement or came from a world where you know you don't have something like an outreach.
Like the process for you to send an email to somebody and then remember oh like I need to follow up with this person.
If you're not tracking that today, please go like first thing you need to do is list out your prospects on a spreadsheet or in your CRM start adding follow up tasks like get very manual sales engagement does this for you.
But it's really big for you to make sure that you're like you're following this you have some system where you're not relying on remember.
Because, ultimately prospecting is a volume game we're going to talk a lot about quality like you do need to have enough volume to like be able to break through the noise, to be able to I mean you're creating noise, we also need the volume to break through it.
So follow up is just super important and sales engagement is going to make that pretty automatic we're going to talk about how to use sales engagement to use follow up even more so than you're probably used to.

And lastly, when you are going after a large volume people, you need data on how successful each channel is how successful your efforts are.
So it gives you it's something that's very easy, those who are using sales engagement very rarely are using the data component and that side well to understand how well.
Are my efforts panning out are they working, am I breaking through with a specific industry or persona I do a pivot away from these things that just aren't working anymore.
And the fun thing about sales is, and you know different economic environments is something that works last month may not work this next month, and so you need to be able to very quickly see that information.
and adapt to it and we'll talk about how to do these things like very tactical so um I want to ask this is a sequence is very core to sales engagement i'd like everyone to type answers in the chat of like what is your best you know webster's dictionary answer for what is the sequence.
and
or yeah if you want to come off mute i'm good at that i'd love to hear, if anyone.
can take something in it.
it's a number of steps, including email calls linkedin tasks and that you go through once you decide, you want to contact the prospect awesome.
Okay awesome Thank you.
Looking a lot of the other.
Systematic process kids yeah sequence people call it a play a cadence like it doesn't have to be a sequence that's just and that's more what i'm used to because that's what we call an outreach prescribed series of events engaged awesome.
Okay, these are all really great answers, everything is correct i'm not seeing anything that makes me nervous yet.
So here what i'll say is is that the way that we defined it outreach and the way that I think you know a lot of you're saying something very, very similar here is.
It is a predefined series of tasks that are designed to to elicit some specific outcome so choose your outcome, first I want to book a meeting with a CMO at a insurance company.
What is the series of tasks that if i'm the VP of sales, I would take, I think, is most ideal for me to go after this person.
Now i'm going to email them i'm going to call them i'm going to follow up with them i'm going to send them something like whatever it is that process documented.
Some oh here's the messaging here's what you should do and then hopefully a sequence, you know what what it does at least with.
In sales engagement cases I can put this into a system, I can see these tasks, and then I can make it really easy to add somebody to sequence, and how somebody might actually process that.
So it's very easy to kind of follow this at the click of a button, so what I will do is one thing, Jordan, I sent there's a forum, I can put it in here if you don't have it there there's a form that I sent it's like a.
Anybody without a sales engagement platform can build their own sequence on sequence in this Google Doc that Jordan is going to share with you and Jordan feel free to come off mute if you don't have it handy because i've also got a handy.
yeah if you have a handy I gotta find it.

i'll put it in the i'm putting this in the chat for everybody we're going to.
Right now, you don't need to necessarily like click this, but then come back to me for a moment I promise we'll come back to this.
But the point is that the reason i'm sharing this is because any of you who have sales engagement.
or those who don't either way I don't necessarily recommend starting to build sequences in.
Your platform, like the you know your CRM your your sales engagement platform doesn't matter you really have to do it in a Google Doc or Google sheets and accept whatever on Microsoft word on notes.
write out your emails write out your content decide what you're going to tasks within that you know that series of content layout your process, maybe get some eyeballs on some feedback on it, and then you can go and put it into your system.
That being said, I do want to show everyone, and some of you may not be super familiar with.
Like outreach in the system today, maybe you haven't seen them, even those of you who are using them in many cases managers might.
lock those things down like that they may they may be the ones that create sequences or marketing does it so they have a little bit more control which frankly I think is a good thing, but i'm going to show you what a sequence looks like.
Okay, so.
This is outreach For those of you have not seen it if you have sales loft if you have a group they're very similar For those of you have CRM hubspot has a like sequence sales sequence builder.
salesforce has something called high velocity sales cloud if you don't have it you're using salesforce you don't have anything else.
Often sales REPS like throw it in for free or like some small little thing it's definitely more old school so good to see here by hubspot outreach sales loft group have some very like new, strong, solid looking platforms, so if I want to create a sequence.
going to show you what this can look like.
outreach can make it really easy though they'll create a you know, a blueprint and i'll show you different examples of sequences that exists today like that you know you can go use and so you're not starting from scratch.
But i'm just going to show you what it looks like just so it's a little bit more visual test let's just create a sequence right here.
we're going to start from scratch i'm just going to show you the process for what it looks like to build a sequence, and then add somebody to a sequence the add to sequence we're going to talk a lot, a lot more about in.
Week three and we'll talk about fast ways to do this good ways to do this.
But let's just start here, so if i'm writing sequence, and again I apologize for those who don't have sales engagement, but this is something you ought to be doing.
In a Google Doc or something else, rather than having to think okay this I need to email CMO, let me go hunt in my inbox somewhere in my Google gmail or.
My you know my outlook, whatever it is, I need to go find this previous email that I think I sent to a different CMO, let me go copy that.

find that and then a week later he goes oh shoot I need to follow up with this person may go find a you know similar follow up email that i've sent before.
document this stuff it'll save you an absurd amount of time it'll get a consistent and get you more consistent data on how things are working.
So here in sales engagement, though, very, very easy Steve does it say this Steve as i'm a sense fan from phoenix and so a lot of the different names that you're going to see in here are like.
Just random names that came to mind, just as john stamos and Charles barkley, but a lot of these were like yeah sounds all transfers so.
I can choose what step, I want to start with many of you, if you're getting a lot of inbound.
Making like sending an automatic email like immediately that looks to qualify somebody or to kind of show them that you're working the lead and the pay, you know saw your inbound requests come through what what works best for you.
can be a really smart way to start a lot of us when we're doing true outbound starting with a you know phone call or a manual email.
is huge we'll talk about the differences in manual and automated emails and they're less than you think, but essentially if i'm going to start with a manual email what these systems, allow me to do.
is to create the template of how I want to reach out I can have you know i'm just going to do this real quick i'm not to actually write out these emails.
I can add subject lines which are super important to test, and I can add different content.
I can add variables of you know hi first name, so this is, you know the kind of old mail merge if any of you've been doing sales sales engagement sales developed for a long time used to use mail merge technology.
to pull in variables from prospects that you're adding to your system that becomes very easy to do and sales engagement there's a lot more, you can do in it as well to pull in variables and all sorts of data that you might have on an individual.
After you've created a step, you can then decide.
Do I want to test and add a different templates add a different subject line.
into this so that I can test the effectiveness of each step, and this is obviously much harder, if you don't have sales engagement, but still is important thing to recognize is that.
People who are using sales engagement well are testing costuming they have enough data they're trying to become very data centric so you're fighting an uphill battle to do that, and you need to.
figure out the way to do it in many cases, I want to follow up with an email somebody not answering me three days later.
I want to follow up and instead of starting a brand new thread.
Maybe I wrote a lot of really customized great information in that first email that I want to make sure it's referenced I want to bump them now, just like you would, if you went to your gmail on your on your outlook.
And you replied, you make a tiny little tweak to say, I want to reply to that email make sure hey you see this and i'm not going to worry about this, the grammar see this something so simple i'm an actress.

And lastly, let's just for fun i'd one more step just secret i'll see in the morning, go to change the system and zoom is slowing things down a bit.
Okay, one more step will just add a phone call and the systems are going to make it really easy there.
You know click to dial technology, those of you, without them, are probably they're using some sort of CRM dialer and maybe you're picking up your cell phone and making dials again.
Just recognize how your competitively stacking up against people click to dial or use dialers that just make it easy to bang out 100 calls versus another time it might take you to make fine.
Okay, so ultimately we've designed the sequence now there's a lot to this we're going to ask homework today that's going to be completely optional, but I encourage you to do this.
i'd like everyone to write a write a sequence and i'll i'll detail what my ask is after after this.
But after you've built your sequence generally, what a lot of you're doing is you're looking at a system like your CRM.
Maybe you're looking at zoom info or some sort of data source or you're looking at you know data some random person you found on linkedin and you're going to get their email doesn't matter.
Ultimately, I hope, what's happening is that you get this data into your sales engagement platform, so it makes it very easy to click on somebody and add them to a sequence.
At this point in time, again, for those of you who have not seen this for the sales loft there's now Richard, this is probably you've done this 1000 times.
For those of you who have not done this, this becomes an easy thing for me to say hey I want to add somebody to a sequence i'm going to choose what I want and i'm going to ask them.
And then, but that's going to do as queue up those tasks for me to do we're going to talk about task execution another time so once you to visually understand what looks like for people to create a sequence quickly.
Add them to it just for fun, those of you who are our teachers or people using outreach today you've never clicked on this button before this is pretty awesome.
editing steps you can edit steps on the fly of these sequences so that.
let's just pretend it's Memorial Day is coming up or Christmas or something's coming up.
or there's something specific about a company and you're going to sequence five people a company, you could very quickly make some adjustments to sequence ahead of time that make you stand out more personal and it takes, you know, two seconds before you can add them.
And it allows you to use the automated.
kind of functionality of outreach while still using little things to to break through its variable so definitely something I recommend all right let's get out of this.
and go back to this so let's open up the sequence template so now, I told you to click and open that i'm hopefully you've all found that Doc is everyone able to open that.
i'll uh i'll just assume yes and put put it in the chat if you are having a problem, and we can address or address that later.
But here is this template this is, I generally like to start when i'm writing a sequence I like to start by writing content.
You know, Google Doc so not this, this is a Google spreadsheet where I can visualize and see my email, I can see how long and how short, it is.

But generally want to do what I want to do is start seeing how this works within like my system for how i'm reaching out if I want to reach out over.
And you guys can mess with this you're going to make this your own make a copy make a duplicate mess, with it, you can change what you want to do, you can break up and.
I think generally the very first day you reach out is you're a new name you're a new face let's make an impression I like to do an outreach we did trip and touches.
phone call email linkedin right off the BAT you want to break through and have them see Okay, this is a real person reaching out to me and they're going to be persistent.
it's a good time to try to capitalize and those first few days being pretty on top of them with phone calls and other channels can be really useful, but what you'll see in here.
Is the ability to say yes, I have a you know this, the subject line going to use on this email here's the copy i'm using.
And then, in some cases, I want to test a different subject line or different message will talk about best practices around testing, but just.
The core message to think through when you're putting any sort of tests on any any step.
Is you need a large volume of consistent data to know if something statistically significant, but what works better works.
You should be be very careful about how many variables you decide to test you're going to test the subject line different subject lines, make sure that the body is the exact same ultimately what you want to find out is.
This subject line gets me a 30% open rate.
And this one gets me a 60% open rate so i'm going to move to that 60% one and the body in each case was the exact.
same you know the same requirements.
But if I just simply moved from that 30% 30% open rate to 60% open rate I should theoretically double the replies I get because i'm doubling the opens and the reply rate should remain consistent so.
One question I think i'm getting a question I see kids house, but one in the.
In the chat.
So I was gonna see if I could interrupt ask your question.
yeah.
I we're going to really small company, the only the only 24 of us.
yeah my boss says that she likes making quick decisions with not so much data, especially because we don't have so much going out with our small sales team So how do you balance, like her, how do you suggest down saying.
How quick to make those decisions, I guess, or if you have any advice on that.
yeah she says that her styles, to make decisions quicker and she doesn't she personally doesn't believe in needing too much data to make those types of small decisions.
yeah, what do you think about the other do you have any advice on how to handle the.
yeah here's here's what i'll say so there's a couple things and say that and and we're going to talk a lot about like how to balance, how many people you're going after.
And sequences so Kate I you're you're not jumping ahead, this is like the core part of what we're talking about today and it's relating what Kate mentioned actually.

relates to Raymond more than you think rabid you said you're a small company, I assume that the market of companies that you can sell to.
For let's say you personally as an SDR is quite large, you have a lot of companies, you can reach out to which means you can be relatively high volume and maybe even more automated and then, when you go to go to market.
Like if the question if you're having this conversation with your VP of sales or your leader, the pushback that I would give to that individual is let's just pretend you send out 100 emails.
And you get an average response rate of like 2% Okay, which, to be clear it's not like that's get used to it response rates are low, email response over its presented to get a 2% response rate that means with you've only email 100 people, it means you got to people to respond to you.
Right that's like simple math to present 102 people if you've done 200 people that's for people, and you know, and so on, if it goes more and more and more.
The problem with small data sets is let's say you have to sequences that have both gone after 100 people and one you have a 3% response rate when you have a 2% response rate.
With such a small tiny amount of data, it means that one additional person responded to one sequence than the other sequence like only one person.
So the problem with having such a small data set is, if you make decisions and say wow this this one is 3% you know 3% response rate and this one's 2% response rate, we should put all our eggs in this 3% response rate.
sequence, the problem with that is you just your data is so minimal that like.
You might have just caught some random person on a good day like again it's not statistically significant and so it's not a bad thing to pivot make changes, very quickly, but when you're making decisions based off of just very small amounts of data.
You just you risk making decisions that you know leaning really heavily into decisions that like just aren't relevant by can may it may be misleading.
So I know it doesn't perfectly answer your question, but like just understand what's the actual number like percentages really are meaningless when you have such a small number of people you're going after.
Okay we'll talk more about a reply rates yeah second year, I mean there's a lot of good good points in here and we'll talk about thresholds of emails and how you know how many people do you know how many people to sequence that's going to be a lot of what we talked about today.
Okay, we are good we're trending we're in a good spot.
So let me ask you this um and I promise we'll get to the whole funnel stuff it's going to be like credit towards the second half of this but we'll get to it, and if I don't want me in here and just say you messed up you missed my question earlier and I won't be embarrassed.
What do you think all of you i'm interested, what do you think the most effective channel of outreach is.
phone let's let's keep it to phone email and we didn't because there's something you know, and you could do Twitter send direct mail assistant between us.
Like that there's phone them and people put cell phone that's like even better one is great.
Okay Mike I like that answer depends on the industry Okay, and the target yeah same thing Casey put the same thing okay okay so i'm.
awesome answers, what a first thing is is this is somewhat of a trick question because you really don't know what the right.

is like it's it's going to be very different depending on the prospect, depending on the industry, depending on the persona that you're going after but here's what I will say.
i've consulted on a lot of companies.
Like around their sales development processes, it is so rare.
That phone isn't the most effective channel it's very rare that like it that making calls does not benefit significantly replacement.
I do, like some of these people, someone said hey if you're selling to recruiters yeah linkedin probably going to be great because, again, this is why you need to step out what's working but.
there's a lot of you who probably are not using the phone at all today i'd be interested let's put this in the chat again how many of you.
are making phones are making phone calls just say just say yes, if you are just put yes, yes, yes, yes, and then i'm also interested how many are knows don't be embarrassed just put know if you're not.
here's, the reason I ask is I do, that there are a lot of companies today who are only emailing.
With sales engagement it's extremely easy to scale, the amount of emails that you're sending like in to automate that, which is why there's so much noise out there.
It is much harder to scale cold calls like because they're inherently manual there are things that speed them up, but at the end of the day, you're on the phone, on the other end of the phone waiting for someone to answer.
And so cold calls is generally a good way to break through because people are just getting fewer of them okay i'm an exact at a tech company I get very few tech cold calls very few.
I get a million emails.
And I don't look at any of them it's very rare that I look at emails and that's not the greatest channel to reach me by unless it's just like something that's extremely relevant to me.
So there are instances where you know, making calls or you're not making calls can make sense but i'm highly encourage any of you who don't use like to don't call or you social at all to do so.
So, especially I definitely call it's very worth testing for at least seacom success like i'd also just say For those of you who are let's say just sd ours.
Like that's your role today and you're looking to move into some other customer facing sales role I also do believe that making cold calls outside of just the.
Success it might bring you, in your role today will prepare you more and have conversations with you know somebody to sell them down the road.
You can get some if you can sell someone meeting out of the blue, and two minutes, just imagine how much easier it is to sell somebody when you've got like.
A half hour to deep dive into what they're struggling with and you've got more time to do demos and chats and set like in scoping sessions just you need to prepare yourself there.
Any I see the Info in the in the chat there's a lot of.
data is is key to making phone calls more easily we'll talk about some hacks to.
To make it a little bit easier to switch to phone calls, one thing that i'll just just so that I don't forget this point later on.
OK, I see here is reflective of the ratio of meetings booked everything it's I put just on this slide right here you'll see that at the phone generally books meetings and emailed a ratio of eight to one.

And it's going to depend on the industry but that's that's something that i've seen just as kind of an overall overall average one thing that in terms of data that we just talked about this.
That I didn't want to forget is out of office emails or any sort of auto automated response emails. So often there's phone numbers like cell phone numbers in people's email signatures, I have it in mind and a lot of people do.
I can't tell you how often that's ignored like that is insane data in people's email signatures. Even like people who have emailed long before it's in your CRM maybe it's you know if you ever have a system like sales engagement or CRM is often do this.
Where they're sinking emails responded to emails to your CRM you might find someone that you contacted a year ago and that person responded and said F off i'm not interested.
Okay, that sounds like that's painful but same point in time.
They responded they might have an email signature phone number trying again a year later, I promise you did forget and they forgot, they said no to your company or you would like they get enough.
they're saying no enough that that information is super super useful so yeah out of office messages are gold mine.
Other hack I don't necessarily recommend it, you have to figure out the right way to do this, but it outreach in the early days, we used to sequence, a lot of people.
Over like a three day weekend were like that now, these systems do a little bit better job like avoiding times you know when I was like a holiday like a.
You know, Monday off, for you know, not a major holiday, but we would do that because we get a lot of out of offices and then we could call those people.
So it's not crazy to think like you know, putting together some sort of sequence or something that says hey happy holidays, I know you're you know you're probably out today.
You know, hoping to follow up with you afterwards that can get you a lot of phone numbers right there so there's your data source if you're struggling in some of these others.
um alright so just The other thing so so I mean i'm not going to talk a lot about social in this course because frankly i've never been graded it.
Those of you who are successful at it today, congratulations like there's you know it's a small percentage of people who are really, really good at social.
That being said, here's why I still think social is a crucial part of your your sequence.
Social humanizes you social is a way to show hey here's a face of somebody that like is emailing me and calling me your only job as an SDR is to create.
Awareness enough awareness and interest to book a meeting.
And with so many people just sending a million automated emails The more that you can show Oh, this is the person that I just got an email from oh I just got a voicemail from this person as well, even if they never answer their phone and never respond to you on social.
don't you know annoy them or burn bridges over social, but the more that you send a connection request to view their profile anything that's going to give them a small notification that you exist can benefit your sequences big time.
Okay let's come back so gimmicky is using all of these different tasks and channels together in the right cadence and the right volume, with the right messaging to have people actually notice you.

notice them and respond So these are kind of the core channels people throw in direct mail, a lot of you might have heard of like sentosa or Alice or reached ask or postal there's you know different regions have different.
Service providers their direct mails briefs just expensive So if you know if your company is willing to try it, you can do it with high value prospects it's freaking awesome like awesome to have that but it's harder to scale up the web.
So let's talk about just making sequences more effective and I keep saying sequences and I hope that those of you who are using CRM or using.
spreadsheets or something else manager workflow are not put off by this, I truly do want you to create these like this, this cadence of tasks that you're going to follow documented, so that you can use it.
And it's not going to be as easy to automate it and i'm going to keep saying that, over and over again, but I don't like.
Everyone else is doing this and they're all doing this in a system that makes it easy to do it to send thousands of thousands of people and sequences so you need to figure out ways to be more efficient and documenting your sequence and testing is really important.
Okay i'm in the early days of outreach when people weren't using systems like this it was easy to send a bunch of automated emails and get responses, because people were so impressed with our persistence.
Not knowing that a lot of it was automated that has changed now everyone's doing this everyone's persistent that's how it goes and so now, you need to be more targeted more personalized.
have something that essentially proves you're not a robot and shows that you have some something relevant to what that person is working on we're going to talk all about this.
we're going to there's a whole like personalization at scale narrative that you're going to see debated on linkedin over and over again we're going to have that debate, I promise.
I think next week i'll try to remember the material next week or the week after.
And there's also something you know follow up with somebody already called that out earlier, like follow up is probably the one of the biggest things that sales engagement sequences give you.
If you're not using the systems just mark and track and see what you're doing your prospects that you'd never forget to follow up these people.
A huge percentage of conversations are happening after the first couple of emails people get back to you after that so it's super important.
important to know where additional you for your efforts, like more calls or more emails or more linkedin is useful versus where it drops off and becomes a waste of time because there is a you know period of time when it's going to become.
Like kind of a diminishing return and you're going to start getting a lot of unsubscribed and that becomes a bad thing.
Who here has heard the term like persona or has defined personas at their company that you go after for them by resumes.
And I saying yes, I can only see a few of you on video I see like five people at any given point in time so yeah I appreciate, but the waves and the and the chats in there, so.

What you do need to do is like we do need to build some level of foam oh by by connecting and giving an insight into somebody's day to day what that person is experiencing if you've if you're a CMO, you have extremely different pains from CFO and so your emails should be you know very.

You know, it sounds so obvious but I truly a lot of companies aren't doing this well, they just kind of look at their solution and say hey i've got some sort of call Center technology.

And i'm going to I just was working with a client that's call Center technology they're selling.

And they kind of just looked at and said hey we can send this out to a call Center person like operations person or an IT manager, or you know there's four or five different groups of people that we could send the same email to.

And it was we looked into it's like yeah the it person has a million things on their plate.

This is just one tiny problem that they have we need to be much more targeted in the way that we speak to that person.

Then we would talk to like a call Center OPS or call Center technology person who this is going to resonate more with and so it's very important for you to look at your sequences and, as you.

Maybe do some of the homework here to build a new sequence, maybe think of a persona that you haven't really written very targeted messaging before to and build that right that and see if it resonates and if you get more responses from that person.

i'm going to pause for one moment.

Are there any questions that.

You know I haven't necessarily addressed or that I didn't say we will be covering later that I can quickly hit on.

And it's hard to actually interrupt me.

Even i've asked for it i've got one so.

As an account executive post DEMO so like I was in the SDR role sending the demos now post DEMO.

Do you have any best practices for engaging with other dmz at a company, where you may be did not meet with that person, but they are the one holding the keys to the deal.

yeah.

First of all.

that's a easy sequence to create right is to say, this is a you know, whatever your we decide right here, you, you know the messaging us to contact these other people.

write that down create a sequence send it to that person and what's the follow up plan look like, how do you engage with that person in a way that doesn't burn bridges, on the other side.

So I will I do i've i've worked in a lot of instances where outbound has actually been more of like let's call an expansion motion or expanding just even the deal itself motion.

Do you think it's really important to reference what you've what you're already doing unless that person is maybe being a Blocker the first person you're talking to is being a you know major Blocker I think it's respectful to call them out and explain what you're doing.

But explain hey there's you know there's there's things that i'm missing there's there's a you know if you're let's say you're talking to the marketing manager.

And you need to get to the CMO I think it's important to say hey i've been working with this person on this project and you recognize and the CMO will very likely recognize that that's one small project that's tied to a larger initiative.

it's not crazy at all for you to say hey, this is a, this is a great project they're working on, we think we can really help.
I do want to make sure that this is tying back to some of the objectives that you know you've said that are important for the company to reach.
I think that we can help drive these types of initiatives, but if this is important let's you know let's chat I don't know if that's a perfect answer for you, but I think it's I think there's both the respectful routes and sharing that information I think if you're being totally blocked.
I don't think it's totally crazy for you to just go outbound to that person using information that you might have heard about pains that the company's experiencing without addressing that you've had this conversation.
hey a lot of CMOs are dealing with issues X, Y amp Z you happen to know that those issues are the ones that person talk to you about.
If you get called out on it, like, I think you just I don't think there's.
A huge risk of that first of all, in some cases that CMO might say yeah you should talk to this person, in which case you say oh perfect yeah i've been working with them.
I just want to make sure I had all the right context into what the initiatives are so you may have to occasionally somewhat back step, but I think I think you need to feel it out when the opportunity is that is that a mediocre answer to your question.
yeah no that was that was very helpful for sure I know there's every deal is a little bit different and.
Different companies have different pain points and that sort of thing.
yeah like where I kind of get stuck up sometimes is when I meet with somebody that is lower in the totem pole that really isn't like involved, maybe we just booked a meeting with somebody the wrong department.
And they don't understand the pain points that our solution has to offer, like the right person there and they do like a just like kind of cold like hey check this out kind of looks cool here's so and so.
I don't know if that's like.
Like okay let's put that person into a sequence let's see because I know I just don't have a lot of success after that.
You know, with a lot of those types of.
deals.
yeah this one for a lot longer but.
I don't want to like steal.
Too much time, but that was you know you cover part of it, yet for sure.
If I can jump in as a tech CEO i'm curious when you say all client data is the assumption there that this the data on the slide came from.
His cross industry.
If you look at the slide we moved down from last point, I haven't addressed this slide yet.
This right here is one specific clients, and so the, the point I want to make about this slide right here is not that you should stop after six steps somebody else is asking what's the ideal length of a sequence and intervals between them like.
An outreach we generally had like three weeks sequences somewhere with often like 15 steps
Okay, and this was a lot of calls and calls are super useful for us.

You know, we probably have six or seven emails within that and a few social touches so we have longer sequences and we did that, because we knew that even those last few steps could yield something.
With this client I came in and they were just having to two step sequences they had an automated email followed up by an automated email reply.
Okay, so what we did is was very simple thing we just looked and said hey I think we can get more and more out of this because we're still getting pretty high response rates on these let's see what we can get.
And so just by adding a few more steps and just in this case, it was just fully automated didn't take them any more effort.
we're able to find out that gas there's a lot of replies that were happening after the second step.
But we also found is my initial reaction, maybe because of my bias at outreach and other places is let's have longer sequences let's have some more steps.
But what we found after we done this, a lot of times with the high volume data recognized gosh after step six you know, a couple emails a couple calls.
we're not really getting anything and so at that point in time, we decided to cut those tasks, especially the manual ones.
On the latter half of the sequence because they weren't really yielding us much and at that point in time we didn't want to risk burn bridges and so ideal length of a sequence that somebody you know the mark says, asking.
I hate that my answer is going to be it depends, but I do think that having six or more steps you know, three or four emails sometimes two threads of you know, three emails each.
Is is very it's like it's very reasonable to go and do that so sequences itself, though, the point of using these and documenting them and and trying to get this data into your CRM.
or into.
Sales engagement captures that automatically CRM will capture it if you're sinking your email to your CRM.
And these will allow you to measure the effectiveness of each step and how we can help you decide when to reach out more and want to reach out to us and that's you know again an important part of the data game so fun yeah.
question for you as we keep referencing data, this is Jen and Berta I was wondering i'm in charge of building out the outbound motion for my company now and we don't really have too much data.
You know it's kind of all called no account strategy and it's all pretty much from scratch, which is.
I think a good problem to have because you can start clean, but then also right like nothing is built out so i'm kind of tasked to do all of that so.
what's I guess what's your recommendation when there's no data in sort of the testing game right is it like.
you're saying right keep the subject lines this say different, and then the content, the same like is does this motion change at all for like net everything's fresh net new and starting to build on that data.
So I can't remember the person who asked earlier like hey you know we're we're small scrappy we want to you know get get things moving fast.
What I would say invert Are you the marketing consulting company okay.

Yes, yes.
it's been referrals based up until the point so it's been like know prospecting needed and now we're at a point.
Where we're like all right now I do yeah.
Okay cool yeah I used to run partnerships and outreach for period time I worked with you guys.
yeah reason I bring this up is bring up you know the other guys question is that.
When you don't have anything the nice thing is is you can throw a bunch of stuff at a wall fast like try, I would say if you're building your emotion, what are the core personas that you work with probably a Sam Oh, the Director of marketing OPS director marketing.
Digital marketing and yeah those like.
I would build three or four sequences geared at each one of those people and i'd start sending them like and and what that means is.
It doesn't matter if it's you know six steps or 20 steps start sending it and getting it out there and seeing what comes back.
You may find that and I had to do this, I can I worked at this company or condo they've been around for a while and you know.
awesome revenue growth and run rate the persona that I was going after was really untouched, so I kind of had this experience of, we need to build this initially I through some stuff I just wrote some stuff down like I didn't try to agonize over I spent the weekend writing.
sequences and what we found, though, is after a month or two and we put a few thousand CMOs i'm a senior level marketers through it cool.
Like our response rates are off like even for you know for for senior marketing leaders who are busy.
We just recognize okay something's wrong about the messaging that we're going after here like it's not working, so we need to either decide do we pivot the messaging or is this not a persona that we should be spending our time on.
We should be trying to focus more on the more you know digital demand gen battle those sorts of people so.
I didn't get something down written, you know, without agonizing it over, but having a consistent way of we're going to it from now on we're going to go after this persona for the next month with the sequence.
gotcha okay.
Like I think that's it's more about doing something, consistent and.
So, like i'm i've spent the last couple years doing product marketing product marketers and marketers for a lot of your sales people who don't love marketers and i'm kind of a marketer who also doesn't love marketers.
Where marketers agonize over the language and the word to use get out of that.
Like just as part of the yeah get out of that.
get your VP of marketing away from this like Oh, this is the email that I would response it's like now like I don't care if you're the persona itself that you're trying to sell to get a sales person to write the sequence.
Short and sweet easy at the end of the day, we're going to talk more about this.
No one cares about educating like who you are what you are your.

Only job is to book a meeting so you need to do the minimum amounts to book a meeting we're going to talk more about this.
So and, by the way, Jim I think this applies here for all of you listening and watching.
I there's there's different types of personas different types of people different types of you know outcomes you're looking drive that can require different touches so high tech sequence if i'm going after my top four persona.
I might need that you know that if I hand that over to my email they're going to be psyched out of their minds to get this meeting and that's going to be, you know, a sales accepted lead for me.
it's very likely somebody that I want to put more effort into I want to make more calls, I want to take a more manual approached my emails I want them to you know I want to engage with their social more.
Just think of the things that are more manual in nature, those of you who don't have sales engagement, everything is manual.
But you know how much time, are you spending sending those follow up emails is there.
Something that's just you know it's automatic you're not deviating from the same one every single time that's you know, look at that as like.
Essentially, an automated message those so so high touch, for your highest top performing people put high touch low types, is a great way to deal with people who are kind of the second rung of people, I think it was David, who was asking.
About you know what do I do with this one person who's not engaging I want to go to you know get somebody else who's the actual decision maker.
Maybe the decision maker that's your high touch your low touch.
You look at that person if you're having if you're getting road blocked by those people stonewalled by those people all the time that title that persona maybe that's a lower tax person to go after because.
they're not going to progress, but maybe they give you really good data.
That you can use to engage other people in the in the company really good pains and messaging so, then you can use your you know high touch to go after the right people once you've discovered the pain.
automated touches you know, this is the people that are maybe the people that are influential but not super useful maybe titles that can be useful, but like.
50% of the time they're misleading and are actually not good for you, the more that you can scale some of the automation you're going to get really low response rates.
But the point is is at that point it's just gravy you're just looking to see you know, did I happen because I wrote my messaging targeted and specific persona with a specific pain.
If somebody responds here, it probably means the right, the right person so it's nice to scale those those automated touches um okay we're not going to talk a ton about just like email copy itself.
But there's really three components to writing these emails as you write your own sequences what is the subject line will this get opened, we can talk i'll share some some best practices around subject lines.
they're more important than you think, though, if if you agonize over the perfect content.

And then 70 80% of people don't have been opened, your email, and like that was a total frickin waste of effort, even though you read it read a grading so you can be the best female writer in the world, but if you're not if they're not good enough and that's a problem.
content.
keep it short and sweet That being said, some of you may be in industries where you take you know you there needs more messaging there's needs more information, again, this is why you test.
I worked with a client who is selling their selling a healthcare service very old school.
my hunch initially coming in, was hey let's write some sequences that are short and sweet and concise easy to respond to.
We found out over time that actually their demographic there you know the people they were selling to needed more information about all the different services and, like the regulatory compliance standards, this company.
You know kind of abided by, and so we have some long long sequences that like on paper looks terrible but they they performed better because they were more informative and that persona in that industry liked it.
I know this this third component you're not going to see many people on linkedin or anybody talking about the speed component.
This is like honestly I think this is one of the most important things that isn't talked about in all of sales engagement, or like in sales development now bound and.
For those of you who are seeing and like follow sales development thought leaders influencers on linkedin.
can't tell you how many times, I see these people posts like a an email that they received that says.
I got this email that was amazing, let me post this and i'll shout out the SDR and tell them how great their okay now i'll give you an example.
And I will call it the influencers themselves just know that, yes, i'm sure you resonate distance and you'll see this.
Say hey this str wrote me an amazing email and the email say something along the lines of high name of you know influencer leader.
I was listening to your podcast on this with this company what an awesome thing that you did you know I also saw that on your Facebook you saw your Twitter or something like you say this about yourself.
So now, let me take this information and connect it to like my value prop okay and it's like this very creative well written email.
The only thing I think of all the two things I think about us Oh, that is a really good enough like good job on that SDR the second I think about is.
How long did it take that person writing them like.
How much time did they first of all agonize even if they've done all the research like forget the amount of research that went into listening to the podcast and doing all the work.
How long do they then sit at their computer and agonize over live in this email did they spend 2030 minutes on it and then spend a half hour listening to podcasts that.
is I think that's scary behavior on linkedin because what that does is it promotes this idea that.

That will make me successful candidate in certain environments sure, but for the most investors who are playing a volume game you got to get to a lot of people, you have you know 40 you gotta you gotta.
Do a bunch of writing and or you got to put a lot of people in sequence, you have a high quota like.
that's just that that makes me nervous that that SDR that promoting that actually creates more harm than it's worth and so, for you, one of the things I encourage you to do anytime you're going to customize them now.
we're going to talk a lot about the richest research process next week to make that an efficient process for you, you can use again and again and again on certain accounts and prospects.
But the actual writing of the email somebody said, like I love your calling up the agony of customization yet CAP it's just add.
Any response you get you know you get an objection and then you're like.
Oh, what do I say they said they're not interested, what do I say, are you send an email on you're trying to customize it.
Like you should honestly be looking at a time or pull up your phone and time yourself and say I need to write this email and five minutes.
I got a response that said there weren't interested I need to write this in like two minutes, and this is where there's an opportunity to put you know, to create templates to write other sequences that help you respond to certain things to save you that time so that you're not.
Because that's just not scalable and that's again why I think these some of these examples that I see are actually really painful so speed is something you need to think about every single with every single activity you're doing as an SDR so.
All in all, working.
Research and writing email how much time like maximum do you think you should spend doing that.
So here's what i'd say I think that you can do that when you have if you're working off of you know, set of accounts we're in we're going to talk more about this, I promise.
you're working let's say you have 200 accounts, you should spend like a.
Like a real amount of time let's call it like a half hour researching each one of your accounts.
And like be really, really cautious about where you're researching it.
Where you're documenting that research, so you don't have to do it again in a month when you're like oh shoot I haven't reached out to this count again, let me go refined out with this is a document that we're going to talk about how to document it documented be.
Be in super angel and insane about your note taking process like str should be some of the most organized people in the world, but do the research on an account.
And the people within that account the relevant personas within that account within let's say a 30 minute period Okay, maybe really big enterprise accounts, like those of you who are just to have a small subset accounts you spend longer.
But spend a 30 minute period of time.
researching it and documenting it and then, when you're writing that email, you should have that research right there and that should in for you, maybe the very first email you right to an account set a timer of 10 minutes.
But if you're getting beyond that, like you know, then that starts to be a concern.

So it shouldn't be something it should you're not going to be writing super manual emails all the time, but I couldn't that period of time where you're putting people into these manual sequences you're spending the time writing these.
manual emails you need to be conscious of how long it's taking.
Mary in the chat has a great point, and this is exactly you know kind of my point here is, you can customize an email without wasting too much time like.
there's there's specific things you should be looking for that we're going to talk about next week, but also even manually nails should be mostly template types.
Like the end of the day, your value prop the things that you do whoops you guys still here, this is this my kinda like a tab system or my computer.
To do let's go back to work, and so manual emails should be mostly template eyes, at the end of the day, so that you can quickly and efficiently get through.
Even.
manually Nelson just make small tweaks and changes and references to get to a better spot to go okay.
we're right here okay cool.
i'll put this back up.
All right, I don't see my screen i'll good.
Okay, so okay i've spent enough time here, we got a lot to get to the next 25 minutes and.
We talked about the like str outbound sequences high low and automated touch we're going to spend the third week talking about specialized sequences okay.
i'm telling you if there's one thing you get out of this entire course if you're just using like cold outbound you've just.
Either using outreach sales loft whatever to scale cold outbound sequences where you're using your CRM or spreadsheet you've kind of documented, this is the way that I go after these new people.
One of the biggest wins you'll get out of this course is developing specialized sequences sequences to use in other situations, these are other like nuanced outbound.
experiences which i'll give some examples in a moment, or people who have replied to you in finding out how do I capitalize on this reply, how do I use this information for future things so I want to get some ideas of.
One of the things I question i'm going to ask you, and I would love a couple people come off mute and others to put in the chat.
What are some really common processes that you find yourself doing a lot as an SDR that you could.
see an opportunity to do a sequence for it's not a cold outbound situation i'm going to give one example, to give some inspiration.
And it's a it's not an SDR examples more like an example, and this may be relevant for you know that David mentioned earlier.
If you are any giving a lot of demos or a lot of like kind of first conversations in afterwards, you need to follow up with probably something very similar that you send the most prospects to tweak it a bit depending on the conversation you had.
And let's pretend you didn't nail down that next step, or that time in that in that meeting because it's short for the person seemed interested that.

Post email post DEMO email, and then the follow up process to book the time that's a great sequence yeah to have that sequence yet to have that in your back.
Save you a ton of time and again you'll find out what isn't isn't working what are some other good examples that people have education nurture great great idea dropbox.
At smart to for dropbox I believe you have your free option, it makes a lot of sense like if people are free, how can you educate them help help nurture them along the path great idea any other good examples.
yeah go ahead.
yeah sorry, how you doing my name is Matthew I manage a team for like a personalization software, we attend a lot of industry, conferences and events we do like a lot of event follow ups after folks meet us.
And, despite the fact that you don't generate a lot of revenue from the industry conferences we do generate a lot of opportunities, based on the follow up that we do it for you meet them.
Okay event fall awesome awesome okay that's a great idea.
Okay, I would give I would give examples of post them I think it's a good question I actually think outreach itself might have a blueprint for not using outreach that's not a not a big deal we can talk, maybe Ping me on linkedin or something I can try to give some thoughts around that.
By the way, feel free to message me or Ping me on linkedin happy to try to help.
Afterwards, but some examples hey i'm looking for a referral I got a referral, I want to contact that referral, I want to.
I just got off the phone with someone cold call and they pushed me off and said hey why don't you send me some more information.
Now it sucks it's a bad push off, but you get it a lot when you're cold calling, so you should have a sequence of like what is that information I send them how do I then catch you know catch up with them.
Somebody pushing out says hey Bob with me in six months, better convert on that person six months what's your sequence for that.
closed last opportunities if you have opportunities that have not closed before there's information about in your CRM about.
What happened why they didn't convert what other things are a priority if there's any notes at all great sequence to what I would call pick up the conversation to close.
Some of no shows you want to meet you should have a no show sequence lots of stuff here that, like you should think about we're going to talk more about this next week skip through this because we saw a lot to get through.
One thing, just as your sequencing one of the things I sometimes see kind of the rookies do is go spend like a.
couple like 1000 people on sequence just dump a big list in the sequence, and then like work through those tasks.
throughout the week what this does is it creates like a wildly and consistent workflow what you want is.
To remain consistent I put 10 people in a day and i'm going to follow up on the tasks of the people that I put in the day before, otherwise what happens is your sequences that work on an interval.
Where you say, I want to email this person three days after I emailed them first.

When you have tasks if you're looking at sales engagement, you have tasks that are week over do these people you're going to have a real hard time breaking through the noise when.
This person hurt got an email from you, once three weeks ago, you call them two weeks after that didn't leave a voicemail let's pretend then email them again a month later, like that's.
They have no idea, they get enough email that like that's just that's not it's gonna be very difficult, so want to stay generally on top of our tasks.
So you need to make sure that you're working the right amount of people, which was a question earlier, you know how to figure out what that right number of people is.
vastly sequencing and research and some things that will pay huge dividends don't do them if you are like a.
cold call heavy shot by easy because cold calling scary to just like fill your time with.
Other things during like the best times to call, so you know mornings and afternoons right after lunch before it's too late afternoon, and these are great times to call.
should not be filling out like non selling going to do is pull up the whole Jordan pull three do you have three ready okay I.
want to find out two things, then we're gonna do for right after this, but I want to find out how many accounts are in your name.
If you don't work out named accounts that's fine if you let's say you are one or two sd ours and you've got a massive market and there's no accounts in your name but, like you could reasonably contact thousands of accounts choose the high end of this obviously.
very interested in seeing this.
Because a lot of you have a bunch of accounts now a lot of like super like enterprise focused let's say.
Even I might be a little naive run educator but i'm kind of confused about what this question means.
So.
If I am a.
Somebody trying to sell sales engagement software.
I.
As an SDR need to find out who am I going to target to try to book meetings with now generally, what I would say is is like a target let's say tech companies that have sd ours, would be a really good place for me to go try to sell.
outreach and so that list of companies that list of companies that like I could go after is that, like the the accounts that are in my market.
In many cases, if you've got 10 sd ours you're going to divide those accounts and give yourself, you know 10% of those accounts or what does that someone answer your question.
Yes.
Can you go after.
But thank you.
yeah so I mean everyone uses different terminology and.
So I apologize for these things okay cool Now I want to do perform.
And sorry if we need to like shirt Jordan tickets up and most of you are about half of you are 250 accounts or more.

The rest of you were kind of that under 250 mark and then there was about 7% of you that are just working off of leads.
So how many prints So this is the question I want to find out now is let's say you're targeting and account and let's say that account is Google and you could sell a finance technology to Google, there are probably hundreds of people in a.
Finance department at Google.
That you could potentially have a worthwhile meeting with, and so, if you're working in an enterprise company, you probably have lots of prospects, you could go after and each company.
On the flip side if you're working SMB you're selling to a restaurant or a doctor's office you might have a million accounts, but you might only have like the restaurant owner is really the only worthwhile meeting for you to set.
says, I want to find out how many prospects at each accounts like are you generally able to count.
Okay.
Okay, so we're going to fly through this X, but this is where we're going to do some some math it looks like a lot of you are sitting in a spot where yeah i've got somewhere between.
three to five it looks like 75% of us are between three and 10 contacts, some of you have some larger accounts with you know larger market.
And it's a you know about 15 20% of you look like you're working relatively small accounts, most likely so i'm, the reason I asked you this question I want you to think about the answers that you just wrote wrote down.
Every single company when they go out to set their revenue goals they want to go raise a bunch of money from venture capitalists or somebody.
They have to determine how big is my market how many companies can I realize realistically sell to a lot of you've probably heard different variations of something called a total addressable market.
here's the market of companies where I can sell my services what we're going to do now is we're going to find out each of your individual at the company level, but your individual.
Like personal total addressable.
Market so going to give a few examples, and these are some examples, and I think that you know I bet a lot of years it yep that looks like me.
i've got 200 accounts situation where i've got 200 accounts one prospect each okay this you you're probably an SMB person get selling to a restaurant and you've got one restaurant owner, that you can sell to this is just an example.
Next situation i've got 200 accounts, but in this case i've got 15 prospects each.
This gives me, I mean this gives me a market about 3000 people that I can realistically laughter that's a much different situation than situation, one.
And we're gonna talk about the implications that situation three i've got 50 accounts, this is probably i'm maybe more enterprise focused i've got a smaller subset of accounts or maybe i've got a really small industry.
that's appealing to my to my service and so therefore i've got to be really careful with these but Thank goodness i've got a bunch of prospects that each one of these accounts that I can go after so I still have 1200 and 50 people to go after so.

For each one of you this number is going to constantly change as you get more accounts, if your accounts as you hire more REPS as you fire REPS whatever it is people promote this number is going to completely change.
But, in general, I assume a lot of you.
I need to generally understand, here is my realistic like grouping of people I can go after so someone had a question earlier of how many people should I sequence on a given basis we're going to answer that in just a moment.
So I do want to ask them i'd love you to either put this in chats or go or come off mute name, so this.
How would your prospecting approach change in let's just say situation, one see the same number of accounts between the situation, one and 200 accounts, but one you have one prospect, and when you have 15 prospects, how would How would you change the way the prospect.
Now i'm going to look at the chat but I, you know anyone is willing to come up here as well.
Okay, just in the interest of time i'm going to start answering some of this here's here's how we're changing my mind yeah let's put like rabid rabid as a good point prioritize more yeah I mean when you've gotten.
A very small market of 200 prospects you'd be really careful not to burn those bridges right like let's say you have a high unsubscribe rate and 50 people unsubscribe and you've got 200 people, all of a sudden your pipeline.
goes from 200 to 150 that's bad right like that's all of a sudden you've lost a big percentage of your market acquire your market situation to 50 people on subscribes probably not a big deal if you're able to get the others to engage with you and respond to you.
So, the reason I bring this up is is that 200 prospects, is a relatively small market doesn't matter how many accounts, you have or prospects at each account exists.
Your total market of prospects matters a lot in terms of Do I need to be really you know, can I scale automation.
Raymond you, you know you're the new company that's relatively small.
You could probably take a pretty automated approach at first, is trying to figure out hey we've got thousands and thousands of people, we could potentially go after.
And you can be a lot more volume heavy and every time start refining and figuring out Oh, these are the types of companies that buy us more frequently here's the types of people that resonate better and so therefore i'm going to be more targeted with those people.
But we're having trouble with their, though, is balancing because we are testing out our language and how people respond to us like similar to what you were saying we don't know exactly what our market is kind of what we're testing out.
yeah and.
So how do you balance trying to increase the volume, so that you can test more and figure out who you're reaching out with like also we don't want to.
ruin our delivery ability and end up in everyone's spam.
yeah so deliver ability are you are you one of the ones are using sales engagement or no.
Yes, i'm using sales loft right now.
So, first of all sales loft i'm sure if you if you talk to your CSM or whoever's there try to you know, look at what they publish on there.

There are controls around, how do you make sure that they will throttle up sales engagement providers generally are very concerned about your deliver ability not being hurt and so they are designed to throttle behavior that would make you look like a spammer.
And so what that means is you know if you're.
Trying to send.
A sequence to 20 people in one account like that share the same domain that's the kind of thing that gmail or outlook looks and says Raven looks like a spammer he's trying to send 20 people, the same message at you know at this company.
And you're going to get flack generally sales loft outreach these companies are going to say we're not going to allow Raymond.
To deliver 20 emails to the same company on the same day we're going to stagger them like there's there's two other things I know you're not asking delivered ability question but they're.
The reason i'm bringing this up is deliver ability is a concern sales engagement providers do a pretty good job at helping provide thresholds around trying to help you avoid that type of behavior if you're putting in.
A couple hundred people in the sequence of week and you're not hitting one account really heavily with a mentor a few accounts really heavily within that you're generally pretty safe and deliver ability, the only other thing the biggest issue.
That you also be concerned about in regards to like if I go really high volume and this could really hurt you know, this could deliver ability, the biggest issue is rarely your actions.
As an SDR it's more the data like and so, if you're emailing lots of bad data, and you have a really high bounce rate gmail outlook, they noticed that and they'll flat.
And so, if you are sending a ton of emails and your bounce rates are.
10% 15 20% you need to start being conscious of it, we need to figure out a better data vendor or we need to be more careful about hoarding them so i'm going to move on, but that's just that's just kind of a quick thought okay let's go let's do pull five real quick.
we'll fly through this next little bit.
Okay i'm interested now.
How many prospects forget sales engagement for a moment.
How many prospects are in your funnel that, like you, are actively reaching out to at any given point in time so once somebody like you've kind of said they're unresponsive i'm not going after them.
consider them finish their out of your funnel like you're not going so how many people are you actively trying to contact one you know, at one time.
Okay, so we have a very mixed year, this is interesting.
Some of your higher volume blankets it's it's.
Okay okay.
within one kids at all your cadence so if you're looking at all different cadences sequences.
Anything you're doing where you're calling them you're sending them emails you're you know you're trying to book a meeting with them that's what i'm trying to find out about how many do you think are in the phone.
Okay we're gonna.
win give two more seconds answer and then i'm the one.
Okay here's what I want to find out.

keep this in mind, the answer that you just put for a second I want you to write this down on a piece of paper I don't care on the chat whatever you want to do.
How many people do you think you put in sequence per week you're not using sequences.
And you're just contacting these per week, just how many people do you think you're talking you think you're trying to engage 10 new people, and these are new people let's say.
here's additional people that I put into into sequence every week, do you think you put in 10 different key contact 50 new people tend done now and i'm in silence, these are these are great okay cool.
Alright next How long are your sequences on average like if you're not using sequence that how long are you reaching out to these people do you send them five messages and two calls over the course of two weeks, I do number three What do you do.
Yes, yeah Okay, so I just want to think about how this affects you have a little zoom issue issue one second.
All right, Okay, so what we're trying to do is we're trying to identify the number of prospects that are active in sequence now.
This is more of a quick, so this is pull six keep these other information I promise when you come back to it matters pull six if i'm adding 50 people a week.
into sequence 50 new people in sequence a week and each sequence last three weeks so means at the end of that third week 50 people will fall out of sequence because they're now done they finished, how many prospects are active in in sequence in week three.
And if that continues you add 50 people in week four but i'm going through it ended what's happened.
Yet so i'm still logging in the door, what happens at least no one's ring the doorbell yeah that's an issue so um the the correct answer is 150.
And now, it will be clear it's not actually totally correct because you're going to have people respond throughout they're going to people who bounced around subscribe so 150 might actually be like 120.
But essentially if you just look at this this image that's on here.
You put in 50 in week one and they stay for three weeks 50 in week two and 15 week three at the end of week three like right before those 50 fallout from week one you've got 150 people in sequence at any given point in time.
Okay, and if we, for we had 50 more if you're just replacing that people from week one that's finished, so I want you to know take a look.
At the answers that you wrote down so you said let's just pretend, you said I add 100 and you can get rid of perl six, this is that what you wrote down here, you know, in the last question how many people in the previous slide.
Do the calculation for your own file if you're adding about 100 people in the sequence a week let's just pretend, whatever that first one is.
In the average sequences two weeks just math just multiply to let me do you have about 200 in sequence at any given point in time.
Now, if you don't have sales engagement you'll have these fine like its sales engagement, you can generate click a button, to find out how many people are active in sequence, if not, you should have an idea of how big is my final can I increase that what's going on.

You know, REACH, this is just an outreach this is for those of you who are avid users actually pay attention to this can be really fast because it's irrelevant for everyone else.
outreach does not make this super intuitive to find i'm not even sure what was found in sales loft or group or elsewhere, go down and click your settings.
click sequence states at the very, very bottom i'm sure the slides will be saved afterwards and you'll be able to should revert to just you personally, how you.
Like your name and showing you how many people are active in sequence, but if not, you can sort and filter where you are the sequencer.
Okay, so go and make sure you're the one that's like person that's put these people in the sequence and from there, you can find out.
And i'll share this afterwards, how many people are actively being reached out to in your funnel at any given point in time.
This is super important and you can see, this across other REPS across the if you have these platforms, you can see, oh i'm doing 100 but my my buddy who's doing really was 300 or 500 denman you can you can figure this out.
solstice mother Goldman here, you can figure out where sequences are having problems if people if you try to reach out to people who bounced you can go and go through that try to find better data.
And also, maybe you get replies from way back when that you know you need to go you've got to follow up on whatever.
So we don't have a ton of time, so it'd be relatively quick in this last little bits what we hopefully have done.
is identified the number of active prospects, you have in your funnel or given you at least a better idea of probably the number of people you're going after.
But I now want to talk about is maximizing the number of active prospects and sequence again this is volume got 150 and sequence right now getting to 175 200 without hurting your reply rates reply rates much.
will mean that you're getting your book more meetings you know if you can just increase that quantity but while keeping your funnel the same so.
Just a couple quick ideas feel free to put them in the chat i'm going to answer these quickly in the interest of time and how, how should you know if you should be sequencing more prospects.
And i'm going fast if you're up to date on all your tasks you're not having a hard time keeping on top of hey I you know I forgot to email this person or.
You know, oh gosh i'm have a million calls to make tomorrow and the next day like if you're way behind then.
You know that's not great, but also the same answer goes if i've got freakin.
Nothing to do tomorrow or like i'm I finished at three o'clock and i'm done with all my calls and emails for the day and all my tasks, you probably can afford to put more people in sequence House like david's answer.
yeah if you're if you're in case, if you have a lot of time or things on account, you should probably scale up and get get moving get going, but just in general, if you're if you're staying up to date on your tasks and.
that's not necessarily great thing if you have a bunch of accounts that are being actively worked.

And you know you can find ways to create a sequence or create something you know add a level of automation to be more to get those and that's that's a smart way to go, if your response rates are really, really high gain an awesome job you can probably afford to add some more automation.
into your final to be.
which will decrease your response rates, but you might be able to reach out to a higher volume people question.
But, but I heard something.
Okay, moving on okay one more math equation matter we're going to be done.
And red Bay redbay want everyone to pay attention to this for a second 75 people active in sequence with a 25% response rate.
that's phenomenal response rate good for them and sequence response rate it's kind of a combination there's a difference between your individual email response rate and then the total of the sequence itself of all the different channels how's that.
Okay REP be hundred and 50 like David to have 150 people and active in sequence and a 10% sequence response rate.
REPS and i'm going to show these all my screen so it's a little more clear REP see has 300 active in sequence and an 8% response rate.
Which REP is the most effective at generating responses.
put it in there, you know rank them go an extra boost in ranking is it CDA ABC be CA CA B, what do you think.
But then yeah you can just put the top on to.
So I know a lot of your probably within our calculator trying to figure this out quickly.
But here's here's the answer Rebecca just put the right answer and Alex to to that a lot of you probably did too i'm just saying the last ones.
CA B is correct okay why rapid generates 19 replies be 15 and see 24 Okay, so in this case, the volume approach at the lowest response rate.
is generating the most replies and, hopefully, you know the most meetings.
Now this is an oversimplification like I just want you to understand that what's happening here is.
For REPS see to do this if they were working far fewer people in sequence, then they just they would they would get blown out by REP and rugby but they've taken more of a volume approach.
So there are other items and metrics, though, that we should be considering that, like obviously create some caveats on the last one.
And i'm going to jump through this quickly.
So, the one thing that matters is obviously if that person who's putting 300 people in sequence gets 888 percent response rate and all of those 24 responses are unsubscribed not interested, I don't want to talk to you, you know laid off me.
that's not a good thing, so we do need to understand the sentiment of how people responding are they positive are these negative, are you getting a lot of objections what's the argument show and subscribes so just definitely something to consider as you're looking at your funnel.
Also again if that person with 300 people active and sequence has a small personal addressable market they've only got 600 prospects let's say to go after.

In a couple weeks, they burn through everybody that's bad like if if that's all the if they just burn their market for a few months and that's really hard on the flip side.
If somebody so that that REP a with 75 people accident sequence if they've got a tiny little market and are generating really high response rates then that's the exact right way to.
Go so I just want to again recognize these are very different situations all of your situations are different, the important thing is for you to understand your file.
How many people should you be going after what are you know what is kind of my cadence of activity and kpis that i'm doing on a day to day basis, and how does that affect my response rate or no.
or about it time made a couple other things right here, I just want you to think.
of your own metrics look at your file, how can you how can you improve Should I be looking to increase volume should I increase my reply rates, you know, can I do both.
reply rate is again compose an email response rates it's phone response rates it's linkedin so if your punches that your reply rate is low because you weren't particularly good on the phone start role playing.
Like that's, this is what you can attack this is like similarly look at other Apps of other Apps have higher email reply rates.
figure out and understand why that's the case and try to take best practices from each other, share things you know test don't just have your own motion.
For those of you who don't have sales engagement and they're doing this out of CRM or elsewhere, like.
Try to you know share best practices across your different teams, so you can scale, the data that you get back commit to hey whenever we do this we're going to follow this process let's see how well it's working.
Get that consistent data, so you can start stealing from each other and figure it out so i'll close and then.
If this Jordan will use I don't know how this is being sent out but there's some like homework ideas that I shouldn't have to give much thought around that I think you guys would all benefit from, but this is why managers.
Like so big on control icon kpis kpis if you've got strict kpis are quantity you're controlling like how much you're pouring into the funnel like i'm contacting more prospects, or whatever i'm supposed to do.
quantity is something that you can perfectly control it's completely 100% in your control the quality is hard, this is why managers have a harder time.
Like quality is where you start figuring out I need to squeeze more out of my funnel this or I might need more coaching role playing help enablement.
And if your managers struggling to diagnose and help you figure out, you know you're doing all the quantity right, but the quality is bad like that's where you need to lean in and ask for more help.
Because this is where the company itself has a responsibility to help you as well, but by attending trainings like this, as well as really helpful, so this kind of the homework.
For there was an idea going to write yourself a sequence, I think this would be really useful to find a high volume process today that doesn't exist as a sequence.

and write some content write some tests in there should be easy for some of you, starting from scratch harder for those of you have done it a lot and then other ideas I want you to really look at how can I pour more into my phone.
A lot of you may feel okay i'm i've done this i'm playing a video game, I need to get better from quality that's fine.
Look, for little ways to optimize add more automation whatever it is, so I know wherever time I can answer some questions for those of us and, like other kind of outstanding questions for those of you can hang on a bit longer.
So, thank you very much for attending.
And everyone the slide deck the sequence template that we showed a little bit earlier and any other supplemental materials, you can find those.
into shape Oh, where you went to join this call, in the first place is a class materials folder that you can click right into and that's where you can access everything.
That way, you don't just have to like look at the look at the recording of this to remember what the homework was or anything like that.
And this was like the kind of general overview for how you should be planning and looking at your your day and your time and how you spend your time as an SDR next two weeks are going to be a lot more tactical of like here how do I actually research accounts, where do I put this information.
What are the best practices for how I respond to an email or call objection.
get very tactical like how to use these products, better how to just you know organize your day better.
Any questions.
hey I got a question for.
joy.
yeah fire away.
what's up, so I.
I saw on the platform that you have to attend to all three classes to get credit for it.
And I did not realize, but we have our second half kickoff next week.
I have good news for you attendance doesn't.
necessarily mean the live session, if you watch the recording once it gets posted which so every week i'll be.
i'll be posting the recording an hour to it obviously depends on whether how much zoom wants to cooperate with me, but an hour or two after the live sessions completed.
The recording will be up there, and if you watch that it marks you as attended anyway, so you get the attendance credit, whether you're here in person, and obviously.
there's perks to being here in person, you could ask questions and interact and everything but also understood we kind of all have very busy lives, so if you gotta watch the recording instead you're all set with attendance.
awesome Thank you appreciate it.
No problem.
I have one question just from pronounce policies from saying that incorrectly i'm.
going to reply rates really hard if you're using sales engagement linkedin and this isn't the fault of any technology out there and linkedin does not give that data.

They don't they will not write that data back into other systems, so the only way that you can do this is, if you manually.
let's say you are using a sales engagement provider CRM or whatever, if you manually go in and like finish your sequence and market as replied after a reply step.
which by the way, you need to do anyway because someone responds to you via linkedin and your next step is an automated email you're going to look down.
If that email goes out or you, you know, keep making calls and tasks on that when they already responded to you via linkedin so anytime you have.
A linkedin step that garner's response you should go in and see what mike's kind of what's upcoming in the sequence and market is applied so that's, the only way that you can go in and say we did you know we got a reply at you know step six which isn't even a linkedin response.
I was starting.
In March I didn't I didn't know i'd be interested in understanding more about info marketing.
be a general I worked with the linkedin team for years found when I manage the outreach ecosystem, they don't they don't like giving that data so often it's.
Often, the companies that do this stuff, and this is no reflection available i'm sure it's great often the companies that are getting this information from linkedin.
are doing it through South through some sort of way at web scraping which linkedin doesn't like it will shut down if companies get bigger, but again that's i'm not saying apple market is that maybe they have some other thing that's getting them.
So thanks everybody i'm excited for next week.
Alright Thank you so much Steven thanks everybody for attending, we will see you same time next week.
Thank you.

Class 2
text
So today, instead of focusing on just the funnel itself and how to approach and understand your day we're actually going to be relatively tactical and getting into how do I research, what are some key ways for me to do this efficiently.
And then, how do I apply that research in my emails my calls like a lot of lot of different things.
What I hope, one thing I do want to share is there was an opportunity at the end of last class to provide feedback, there will be the same same thing this next class and the following.
At least this class, will you still have the opportunity to somewhat determine what I teach in the third class the deck is done my my solution is down, but if there's something that you feel like you're not getting.
and very willing and happy to address it learn third class and try to touch on this more The one thing I do want to make clear about the nature of this class.
And what like the purpose of this is is this is very much meant to yes book more meetings that's like what we've shortened it to.
But it's specifically calling out using the principles of sales engagement so like we are going to be tactically involved with sales engagement platforms and last time we did that policy, who have you are using these platforms are not.

That the tough piece, and I apologize for this is that there's 15% of you, that are not using these platforms you're using CRM you're using.
You know in again Sarah and, in some cases has sequencing capabilities.
And some of you might be using spreadsheets or something else I will do my best to be appealing and share how to do the sales engagement things in those other solutions.
But i'd asked, like those of you who are in that situation that i'm not directly addressing all the time I hope they still get something I also hope that you see what are the others are using.
so that you can then tailor the things that you learn there to your own systems okay so um first of all.
I gave some homework last time it was optional, you may have just ignored it that's totally fine what I what I would ask is the people who did do some homework.
How many of you like was this homework, the first time you've like written your own sequence.
Just like put me put in the in the chat me or yes or something along those lines, like hey this the first time I wrote one and it may be really blank if everyone's like Adam do the homework.
So I thought wait a minute because it'll get awkward otherwise.
yeah i'm not saying i'm the chat isn't blowing up so here's what I would say okay Steve Steve what's something that good is probably the same that to be nice the.
i'm seeing some faces on her smile and say said so yeah I think I know the reaction here here's what I would hope is that you do take the opportunity to.
recognize it can take some time and it's one of those things it's on your to do list for a while.
Again, identify a sequence or a process that you can read a sequence to.
That does not need to be outbound, in fact, if you wait until after if you're just like okay I didn't do the first one, I had to do it this week.
i'm actually going to tell you instead wait until the next class, because the next class i'm going to teach about a lot of specialized like not as not outbound sequences, and these will be opportunities for you to build sequences you very likely have not built before.
Derek w asked a good question.
And cool Linda has done a bunch of the sequencing or herself and Derek had a question i'm an A I don't have access to a tool like average to do sequencing I still think.
First of all, obviously it's more useful to have something like sales engagement they're.
writing a sequence there's that form that I put in the in the chat last time, Jordan, I don't know if that's easy to find I don't have it up this time actually do have it linked in this in this first.
piece put in the chat again this template is still important for you to log and put some there there's a reason it's it's created in a Google Doc or Google spreadsheet in this case.
Because if you're an account executive.
You still are following certain you know certain processes, whether you're doing outbound prospecting whether you're following up on demos, or you know initial calls Those are all opportunities, where you probably have something that's relatively replicable.
You should log that put that down into a very concrete places, you can copy and paste from those templates and put it out there and there, there are solutions where you can create templates I know.
You know if you have hubspot CRM there's a lot like email tools that are not sequencing tools still allow you to save templates.

I would encourage you to use that and just find any opportunity to not agonize over every little step that you're doing and to create efficiency in your day to day so.
I think I see a question Derek any questions on that or am I am I, yes I just saw hand hand on your video.
You know that's that's great Stephen what one question I have you're talking about sequencing there's so many variations of sequencing I mean I.
It boggles my mind like what what does optimized what what what works well, like yeah i'm kind of lost in that regards because everyone, everyone has a million different ideas, how to sequence so just want to know your thoughts on that.
yeah so we talked a little bit.
talk a little bit last time about opportunities and where to sequence and some sequence best practices, the purpose of the sequence is to make the process of following up relatively easy because you've already designed that process you've written it out.
Like, and so what what I know i'm not going to perfectly answer your question and I want to make sure we get through a lot of the content today.
But the sequence is looking at the scenario or the outcome that you're looking to elicit and saying what is it that I want to do.
Now, if you have a team and you're all trying to drive towards that one outcome i'd encourage you to get with the team, and you know whiteboard virtually or physically and say here are the things that we should be doing.
But on your own if there's an outcome that you're looking to drive if you're looking to book more meetings if you're looking to increase your ability to get through procurement.
And you have a process that you can kind of follow, whatever the process is I would I would encourage you to put together the playbook of how to do that, that sequence is a fancy way of saying playbook.
playbook just often a list it's this idea i've got this binder that I need to read through what i'm trying to figure out and teachers.
let's get this into a system sales engagement makes it relatively easy, but if it's in a Google Doc or somewhere else couldn't care less just document that so you can follow it, so you don't have to think as much about it sales like is very much an art.
But there's a lot of manual work that makes it really difficult to execute and so to the extent that you can take this manual piece.
Make it so that it's automatic you don't have to think means that it releases you to do the art of sales to focus more on what makes you special as a salesperson so okay handouts are great but that's that's.
that's good enough thanks.
Alright cool.
And i'm gonna we can talk about the second one it's more of I hope he just looked at your final and said gosh if there's any way I can increase this without hurting my life what's coming out at the end of the funnel at my response rates by whatever then.
You should be able to book more meetings but yeah I know that's an easier problem.
it's easier said than done so um okay so efficient research.
Is what we're going to jump in and talk about how to do this well so.

This is going to seem like a very obvious question, but I do want some answers i'd love it in the chat or feel free to come off mute I love Derek, by the way you, you asked you raise your hand and coming off me and I appreciate that no make this a lot better.
Why would researching and accounts and all the associated prospects, the important.
Now the caveat important to do sell before reaching out to them.
A personalized persons outreach and their goals humanize personal pain point i've seen i've seen average okay relevance, I like Julian what you're you're on it we're going to talk relevance today.
Okay cool, these are all great answers so um and Derek I think I see another hand raise is that.
Another one okay cool cool with you what's your question.
yeah no I was gonna say the one point that is really when you're researching and account is to really find out if there's any.
Initiatives or any problems that you can really help them out with because if it isn't then you're kind of spinning your wheels you're wasting their time I mean that's the way I look at you know researching enterprise accounts.
it's a great point actually I didn't even have that down my notes, but like.
The reason that research is so important, like before anything else is let's see if I can even help them, are they a qualified account or person that I should even being going after because otherwise i'm wasting my time.
Something we will not talk about our teaching this course, but it's important for you to recognize is.
Look at the people you have been reaching out to and contacting like the titles of those people i'd be very interested if you went to your manager with all those titles.
And said here are the titles and people i'm going to this is easy to do.
If you have a platform that's that's managing these this outreach but scroll through those titles.
I often one of the things that i'm finding is that when I do this and I go through the titles and people that people are reaching out to.
We find that maybe 20% of those titles are people that just aren't really a good fit but there's just maybe some lack of understanding or some maybe someone's had success with that one time, because it was a nisha worked in that solution.
But it means that 20% of the people that are in your funnel may not actually be a good use of time general and you can save a lot of time by not going after them so.
And yeah Raymond gape gatekeepers can be great it's hard to like sequence a gatekeeper but like I think it's very important that is a great source of research is calling the gatekeeper and asking a question.
One of the things we used to do it at outreach obviously our market was SDR leaders we used to call the sales lines of every company.
Like not just go and you know, look at different research online or something we would call the sales line if the answers hey do you guys do cold calling.
You, what are you emailing what's the process for doing this that was super helpful for me to go to an SDR leader and talk about our solution.
Similarly, if you have any opportunity for you to get any sort of information from any line.
I mean, it could be the janitor for all I care, you can you can get through to like if they can give you any information about their company that can be very useful, so what Let me also say.

when somebody knows a lot about you, you would hope and through your marketing efforts which we're not as involved in.
We hope that there's some in down that comes in that people search some terms that they know about a problem that they have and if your company would be able to capture those leads.
Well we're talking more about you, creating awareness via outbound outbound is far more difficult.
Because you're generating awareness, for the first time, but if you do it right it's very predictable like you can generate awareness, with a certain segments of your target market and so.
I want to ask real quick and i'd love for you to answer this and just in the chat how many of you are in companies with no brand.
or like know clearly defined category like it's relatively you're not Google or Cisco or one of these companies that it's it's you know i'm not saying it's easy to get meetings but there's brand awareness.
Very little know brando in a startup yeah Okay, so this is where like outbound is hugely important because people may not even realize they have a problem or the companies exist to solve their pain so very outbound is huge, to be able to actually generate that awareness.
So let me say, there are a few times when research is not that important.
And i'll give some ideas, one is speed if you're getting any sort of inbound requests for those of you who do get inbound and you're following up on the DEMO class pricing, the class whatever like generally speed is far more important.
it's much more important to just respond to them instantly Now you can automate some of that.
But otherwise if you're not automating it and you just are looking up like a CRM lead lists go after that immediately there's no reason to agonize over the research just get it out there, you can qualify ask questions in that email whatever you want.
But you can you can sacrifice a lot of research in those situations also we talked about this last time, if you have a massive addressable market.
And i'm talking about you personally you've got thousands maybe 10s of thousands of contacts that might be available to you.
it's more important to nail like persona messaging and value prop that goes in your email than it is for you to individually research each person that company, because your market might be so big.
You can reach a scale without you know, certainly you sacrifice the response rates that you might be if he went really targeted remember that REP situation that we went through as like REP one point 75 people in sequence had a super high response rate.
per REP three had 300 people in sequence a much lower response rate, but actually yielded more replies For those of you in a massive tam that's what that's generally, what you should be focusing on is how can I scale my reach in a way that doesn't totally burn bridges are sacrificing.
OK, so the purpose of the research.
is yes, I want to qualify great point Derek yes, I want to understand if these you know more about this, these accounts, but then, a lot of you put some variation of to personalize to be relevant to break through the noise, whatever it is.
Ultimately, you need to pass the robot test okay.
So I will come back to subject lines and all those things I promise we're gonna talk a lot about the composition of emails today, but you need to be thinking of how many.

Like where can I put some information that a robot couldn't write in my email soon as possible, as humanly possible so someone understands if they do happen to open my email in the.
20 30% chance that they decide to open it that I can prove pay someone actually spent some time on this like in the early days at outreach.
When sales engagement platforms just starting out and made it easy to to automate emails you kind of could get passed on just persistence on follow up.
That is no longer the case it's now scaled the noise and so now it's important for you to break through so you need to research understand what their pain is.
and find out how to put that and make sure to put that customization early on, and you know so we're gonna talk about where to find this stuff.
So actually i'm wondering, a lot of you probably get tons of emails every day I would bet that a lot of you get even more in your personal inbox of.
Old lists and things you signed up whatever how many of you delete an email instantly based off of the subject line you just can tell that the subject line is.
Not personalized it's just something that was sent out to thousands of people yeah tons of you.
and your sd ours remember you might be more open to actually open emails but, at the end of the day, you're still deleting most I love sd ours it's my world, I have a massive pipeline number of my company work out of that we're responsible for.
I go through my email every morning and I pretty much delete everything without even looking at it it's rare.
For me, to see a subject line or something that I decide who actually I should take a look at this now, I want you to think and we don't need to have first unsubscribe it's my day yeah it's better just get rid of it so For those of you who are opening emails.
You can put this as a chatter just i'm more important i'm more focused on you actually just thinking in your mind and like internalizing it.
What makes you open a specific email, then, once you have that email in your inbox what makes you decide on like this, so either.
let's just pretend it's all the marketing emails you get all the time either there's actually a marketing email that you trust some sort of brand.
And there's some offer it's a 20% discount or something you're like yeah I actually would find value in it.
If it's more of a one to one outreach again you're looking to try to understand is it something that.
Maybe connects with something to me, is it relevant to my situation and often are they calling you my calling attention to that and therefore you more likely to respond we're gonna talk about like how to organize that and how to do that, but humanized yeah okay cool awesome.
So I title this section efficient research and shouldn't why people think that I would title it's efficient research wise the efficient piece so so important for free to either put that in the chat or come off me.
Okay yeah there's it's really easy to say you know for REPS to kind of, say, oh yeah I spent I was researching all my accounts today and ultimately not do much, so you can spend a lot of time on this research time management times okay.
Has anyone heard of the i'm sure, a lot of you have have the gene Apps it's the school, you have the test you take to try to get into business school.

So this was something I always aspired to go visit squad ultimately didn't but I did a lot of studying for the gym at.
Because I wanted to do really well, so I could get into a really you know top Business School.
Ultimately, the interesting thing to find out about the G matt is that the questions are all middle school level math.
Okay, at least on the math section middle school level so not calculus nothing too crazy summer school level math.
So the people who are generally taking this test if they just came did a quick refresher on this math then they could do relatively well.
The the way that this test becomes very difficult, is that the only like the way you do better on the test is, you have to be able to take the problem that's given to you turn it into a math equation.
Like understand it problem solve that equation do so quickly you've got a lot of questions to get through and so it's really the speed at which you can problem solve rather than the ability to problem solve in and of itself.
So similarly here, anyone can spend hours researching i'm sure anyone on here, we could say you've got.
You know, a week to understand this account and to break into it i'm confident that all of us could figure it out, and we could get a meeting with virtually any account on the panel, if you spend all the time.
The key important thing for us to realize I know we talked about speed and email writing last week we're going to hit on that again.
anybody can spend hours researching to do this effectively this job effectively, you need to figure out how to do this efficiently.
To research accounts quickly and not just quickly able to figure out how to just not duplicate too much research, so this is the key point that I want you to take home from us and I.
Really, this may seem super obvious, and this is actually going to be a kind of boring section of this this course.
compared to other pieces, I think, but it's important for you to take this home never duplicate research when researching any sort of account or individual prospect.
You need to have some consistent place to put this research to log to write it down.
For a long time, even when I had sales engagement, I had CRM I had a spreadsheet of all my accounts.
And I had areas where I put my notes on these accounts and I had a column in there, that also said when was the last date that I researched this current account.
Because otherwise it's very easy to fall in the trap I would bet a lot of you have done this and I don't think you're crazy, is that you have.
gone ahead you've researched and account.
And then two weeks later, you go in decide to go contact that account, and you have to do a refresher you have to go back and figure out again what's up with this account what's the latest, why was I going after them what's important.
If you can research once perfectly and you actually maybe put a more of an investment in time on that account than you typically would rather than doing a five minute cursory glance you spend a 30 minutes like.

perfecting what you need to know about that account and logging it that will pay huge dividends so talk about this process.
So the efficient research process start with step one identify an account to research and then market is having being researched so like you, are logging somewhere in your system in your CRM.
And some sort of notes or description or depends on what you know what type of CRM you're using your sales engagement platform, you can put that in notes there's a concept of tagging i'm going to show it.
for you to you in a moment it's a very unused feature of the sales engagement platforms.
it's excel spreadsheet is what I did before, not create a column and mark the date last research, the purpose being that over time.
you've gone through all of your accounts, you have it date stamped and you could go in and filter and say, which accounts have I not researched in a long time.
And you can go back and start from the beginning, is to create a much better process for how you go about your day and how.
Just how to attack your accounts, rather than redoing a lot of the exact same words over and over and over again so let's uh about for a second, and we are going to show you i'm going to just hop in and show you how to use this tagging concept move my zoom a little bit all right.
Okay, so sales loft groove outreach they'll have some sort of.
view like this there's gonna be some sort of task view there's going to be an account view as me prospects if you've got CRM similar.
You may have your task list if you're managing tasks at a CRM you always have accounts you've got contacts you've got again don't.
Even know if this filter doesn't look exactly like you, the key message of this part is that this is very applicable across CRM sales engagement whatever.
Okay, so let's start by saying this next piece, though, is that is going to get a little bit more specific.
So I want to tag some sort of key account so there's an account, and I think in groove they call US companies, and again in your CRM it's almost always it accounts for companies.
i've got a list of accounts and forgive me, this is a fake instance of outreach travelocity populating bunch of fake DEMO data.
let's pretend that there's a key bit of information about an account that's useful to you a lot of you who might be in technology.
it's often important for you to understand a key bit of technology that somebody already has so a lot of a lot of us are in the salesforce ecosystem.
Okay, where it's important to find out is their CRM salesforce and, in many cases, if it's not it's a disqualified accounts not useful for you.
So something that could be useful as you're doing research, if you understand that somebody has salesforce.
Much to think about instances where you could say i've done research on these two accounts, you can do it, you know, obviously, usually doing this one to one, and I can add a tag that says.
salesforce Okay, the reason, this is important is that long term I can build up a list.
I can build up a list of accounts that i've confirmed fit some sort of criteria and it becomes easy for me to add a filter on anything there's all sorts of fields and things you can add a filter but.

And, and again salesforce you can create custom reports to do various very similar thing any sort of CRM you can do the same thing.
But here i'm going to create a filter based off of this specific tab that says show me all the accounts, where I know and i've confirmed that this account has some key bit of information that i've tapped.
Okay, who of you who have had sales engagement platform so forth, have used tags or some sort of field to filter down and like to look at your accounts, a lot of you have.
Good This is like suit not used very often it, and so, if you're using it like awesome good for you, this is a way to save you a bunch of time.
for you to think of your a week or two left in the month and you need to figure out how to go after the accounts that.
Might might like be more likely to take a meeting or to at least move forward and stages and you need some kind of low hanging fruit, this is a great way to quickly identify what are the accounts, I know are qualified and i'm going to blast.
Okay, and actually someone has asked the question, Derek there's an incumbent.
You know if you've got somebody who signed up through your account and you're on month one of that account you're probably dead in the water, like just going to be honest.
That being said, if you know this if you're in an industry where there's a lot of competition.
It can be really, really, really important to add tags on these accounts that says here is the competitor there with and here's the date that that that's up.
It would be very easy for you to then look at your accounts long term and say, I want to go after all the accounts that have this this competitor that the renewal is next year.
If your sales cycles, maybe a little bit longer becomes a lot easier to filter and do these things, so the reason I bring this up in this section.
Is that I mentioned that I want you to research, these accounts, and I want you to market as such, something that I think would be really, really smart.
For all of you to do, especially if you're not just one server there's multiple sd ours, if your company is to talk to the manager talk to the team and say how can I do something along the lines of saying, I want to let's say that you just research at acme core.
You want to add a tag, this is what I did.
Last researched August 2022.
Key back so adding another tax.
Now, if you add this tag in your marketing this account is as having been researched, you can do this in your as a column in your spreadsheet you can do this on descriptions and your CRM.
You can talk to sales OPS and see if there's some sort of field or checkbox or whatever, that you can do here.
That this becomes a very important and easy way to be able to mark accounts has been researched this specific time I know we're not talking about the research process yet.
But this is really important, because you don't want to redo walk you never want to duplicate any sort of research, a couple questions Jen.
tags tags or something to don't sink back I don't know if sales off your groove or the other solutions if they sink back tags is generally something that's like.
A relatively messy area within these systems when people get really tagged happy.

And it's not something that sinks back if something that's really very much meant to have you personally be like benefited by That being said, this or I said, if you can get your team standardize on this we're like.
We all know as sd ours accounts change hands lots of times, it can be really frustrating and feels like you have to redo the work in suddenly.
People are standardized and saying I last research this account on in this month and I marked it if your whole team is doing that, and you get a new account and you see the tag.
That says Oh, this was research last month, which means the prospects are pretty up to date and notes are probably pretty up to date, like I you're not starting from scratch and more this can save you a huge amount of time across your team.
Okay, so let's go back to this and make sure that I have.
Okay cool.
Alright, so we're gonna get we're gonna hop in and out of out of these platforms to try to hit on some of these areas that are probably yours you're not using today that would be very beneficial for you.
So now let's talk about the actual like where to research, these accounts now all of your going to be different every industry is different every industry has different data sources are places that you would look so i'm just going to talk about the highlights.
But what are some areas that you could research or you do research your accounts everyone put in the chat.
Where areas that you always look if you're going to do some research.
Dan crunchbase awesome fast or faster i'm interested Jackie I don't mean to in any way call you out, but if you're willing to come off mute.
Why glassdoor Is it because their job postings or reviews are you like an HR tech solution i'd be interested.
In yeah yeah I worked for Athena and we do HR compliance training.
So i'm always looking to see company reviews, as well as hiring.
cool okay so yeah so something that like that's not going to be in my training, but that's super important for you to understand that.
I imagine you're not getting like a data feed from glassdoor you have to go into actually do this like go mentally.
And so, this is again why it's so important for you to log you've done this research so that you're not looking at like maybe there's another review that comes every month or two bigger companies there's going to be more but.
Like it probably is not super important if you looked at the reviews, two weeks ago to then look at it again two weeks later Is that correct.
Yes, absolutely.
Sorry, to make you keep coming off.
No you're fine you're fine no that makes perfect sense.
yeah so like if you're going to go spend the time on glass door you're probably combing through a bunch of reviews trying to understand this that's a relatively manual process, you should always make sure that you log i've done this i've gone through my process so.
Okay cool yeah there he has a different.

Industry publications, I see linkedin sales now interview yet inside view zoom info lobbies, making these data sources, make it easy to create an area of like.
here's my accounts, and I want, I want to subscribe to news linkedin does a good job, I want to subscribe to post on these companies, I was never an expert like creating my accounts and lead lists within the solutions.
But you should just I just personally was was never great at that, so I don't feel confident training on here's a bunch of ideas can all of you guys are going to have something different.
what's in your CRM what already exists within your serum different activity, if things have synced in the past, what notes or descriptions are in there, my favorite thing within your CRM is, are there any previous opportunities Okay, why would previous opportunities matter that much.
I thought, like if you if there's any free to and i'm not even saying with that contact literally any any sort of opportunity with that account in the past.
awesome yeah.
yeah great idea.
So anything if you, you may understand initiatives that they had that made you not a focus, maybe there was a timing or a budget issue you can go back to.
In many cases who's had a ease I know some of you who are at ease, but even even that hoping, a lot of us here at one point in time.
A lot of friction happens with sd ours, who book meetings and then at least take the meeting and then like don't crush it.
right they kind of mess up the picture it doesn't work well, a lot of friction in some cases, these people that have met with your company in the past.
had problems that were perfect that like your solution did exactly what that like what that person needed.
But the just like didn't connect the dots it just didn't it didn't quite make sense, you might have been the Ad and you know you just you know you swung you missed one time.
So, to the extent that you've now understood, these are the initiatives that like I should have sold on better you can go back and say hey look I know this was super you know this is super important to you would love to chat about this.
months later, these companies like we all have an ego about you know, hoping that people remember us and care about us know about our solutions.
These companies meet with so many different people they have so many different emails calls and with all these sorts of external vendors.
They very likely don't really remember if they didn't buy you unlikely they remember very much about you.
So three or four months later, you could just slightly change your pitch, and it could land extremely low so.
To me, lost opportunities are like the most low hanging fruit that any of you have if you don't have a lost opportunity report in your CRM constantly coming through for please go get one because it's so extremely useful.
Well we'll talk about the sales engagement side in a second and i'll show you that company any sort of company website.
You know if they use any sort of messaging if they're using sort of information shares about what their initiatives or priorities are on their website.

Obviously careers are super useful if you know the types of companies that are hiring for get in the early outreach days somebody had was hiring for us yours, that was really important for us to know.
We want to sell that a lot of you are probably very similar the people might have very specific.
Job postings even within those job postings it might say hey this person's job is going to be to do X y&z and they need experience with technologies, and you know they need certifications that are X, Y amp Z that might be extremely important for you to go help with.
press releases in news, the one thing i'll say here.
anytime a company gets funding that's like a huge time when like a million sd ours reach out it doesn't mean you shouldn't doesn't mean you can't be relevant there, but I think that the more that you focus on.
Engaging outside of just funding announcements and finding other announcements or releases that companies have have issued can be a smart way to break through the noise because there's a lot of noise when funding announcements come.
So linkedin and linkedin sales navigator For those of you who have it anything that's related to the company post now there's more and more people with individual brands individual you posting a lot on linkedin more you can understand what they care about matters.
But I will say is for those of you with linkedin sales now I don't have it here, so I can't DEMO it.
When you do click on a company and you look to do your usual maybe filters on what types of employees in there, and you enter in a job search of.
You know i'm selling to marketers i'm selling it and you can type in different boolean searches, to find out who are the employees that fit within that criteria.
there's a section, at the very top that says any any employee that has changed jobs in the last 90 days if you've never seen this we've never clicked on that before.
Remembering the process here where we're researching and count extremely well up front.
that's a great area to just click click that area because you've done the work.
On the account you've done you've done the work on the prospects you just want to see what's changed in 90 days go click that that's super important for you to understand what's that that that's a very easy way to do research kind of research again very quickly.
Soon Jana.
Oh cool, thank you for putting some of this information down awesome okay ask the question of the last opportunity let's do we actually mentioned you're attached to them before.
I think that's up to you to think through if you if they met with you, and they said hey we're interested.
But we've got a bunch of other initiatives so maybe you know reach out to us in six months.
I think you can go do that, even if it wasn't the same individual You may say hey we met with Bob six months ago, and he mentioned the company was working on this sort of initiative and afterwards.
There would be a focus on some of the things that we offer any previous concepts, you can bring up helps you pass that robot test and be relevant to what you do.
On the flip side if someone met with you and was clearly not interested in that didn't land I may not mention it, and just take the information that I got from that detail that aren't last opportunity and use that to follow up, so I think it depends.
Derek has question on linkedin who's active on linkedin who isn't I don't know.

I don't know what the best, but I know that if you're using linkedin sales navigator you can make lead lists and you can see who's posting regularly and that might give you insight into those that are active on linkedin.
Honestly, the best way to do this is we're going to talk about prospect research in a moment it's not crazy if you're going to do this once.
to pull up any possible contacts on linkedin it might be interesting for you to reach out to one time pull them up really quickly look at other linkedin.
There might be 40 open tabs of all the people you can realistically go after and an account at a bigger accounts.
And quickly go through those and see who's active, who has information on their linkedin that I can use who isn't and you might take of those 40 open tabs you might close 30 of them immediately because they give you almost no good information.
But then there might be 10 that have good information that you should be logging somewhere.
Okay, so um let's see where we are at time you can do better management okay.
we're going to fly through this next little bit just to see where we are Jordans probably like whole this guy's only like 12 slides in so we'll see how we do here.
Very good Take your time.
Okay, let me jump out of this one, second.
Okay let's go to our sales engagement platform again.
One minute.
Just make sure i'm the right spot okay so again, you have now done this research there's one place, you can do this and sales engagement and i'll cover it very quickly if you're clicking within an account i'm actually do this first.
Sales engagement platforms CRM is also did the same thing you have all sorts of data sources that might populate information to your CRM there's also the data sources like zoom info and inside view and others that have this type of information.
let's click on Google.
Sales engagement puts these intelligence titles right in your fingers this often isn't all the information you need is why you need to do all the other research.
But it's a quick way to get an overview of this account where are they are they you know someone that funding is important to you, what are the things that they're posting about.
These are some important information okay now, this is what i'm going to also focus on as an account that I actually have some engagement with, and this again a fake account.
commonly, the first thing i'm going to look at we're going to talk about this is what are the account notes, these are probably empty, and most of your platforms today or in your CRM it might be in an account subscription or something else.
Hopefully, in the next couple weeks your account notes become full full of information that's easy for you to reference when you're doing tasks that's where we're going to learn this stuff and i'll come back to this in a moment.
But the areas that you can quickly research and understand is clicking and understanding the prospects within an account who's engaging who is.
emailing me quickly, who, where do I have information oh I don't have a lot of phone numbers here are these areas that I can enrich.

In many cases you've got a persona associated with each individual or you've got tags from you know past times talking to these people and you'll.
Get you'll see how this research process will pay dividends over time because you'll be tagging things more you'll be getting information you'll be logging in places.
In many cases yeah.
Sorry.
No, sorry real quick, I was curious what the maybe you've explained already the bar graph under that you know gone.
yeah you said just just hover over this to take to take a look and see what it says.
yeah Thank you.
yeah and.
Frankly, I don't always find this thing the most useful but generally, you can see, this is an area where you've been either putting a lot of effort out so in this case, showing.
Oh gosh there's a lot of emails have gone up knowing a couple and bounce back so not like amazing engagement, but.
You can generally see where if I put time into this before, let me actually make my screen a little bit bigger you'll often also see.
When is the last time I contacted these people so oh I haven't gone after this person in three years that might be someone that you can sequence quickly.
Right now we're not talking about sequence and we're talking about the research process but it's important to understand what information this prospect few shows you.
Similarly, in your CRM you will also see on your leads you'll see a lot of the same sort of information.
what's important here you'll see this across all the platforms you'll see something like this, some sort of funnel view I don't think group does a great job of this.
I don't think a lot of your own group, but you'll see this like hey let's look at the people who have replied.
let's look at people who might have been unresponsive and it starts becoming easy to see is there information that I can read in these emails that that's important too that you know might be interesting so let's actually.
sequences to what are people who have responded before you can see, this funnel view who's replied, let me go in and look at this emails.
Let me actually read the emails oh look at this guy let's see this is obviously a fake version of mine let's look at this guy Stephen.
I see you, so I wrote some sort of personalized email to this guy and he responded open to learning more can you follow up and q2 let's say June 2022 it's August 2022.
We missed the follow up let's go after, and so this is information that for me if I see this.
there's a ton of information in your CRM and your Sep and linkedin that's where the, the first thing you're going to do as you're doing all this research again log it make sure you don't lose it and so on, Stephen i'm gonna say said to fat.
And i'm just doing some easy stuff and 2022 okay.
So I might put this information on this prospect notes.
Just for all of you out there, this happens and all the systems, the same way.

The account notes, you can make notes about the account, it will also show you all notes of any prospects associated with that account, so it becomes very easy for me to say, I did a.
bunch of research on linkedin I loved it in my notes did a bunch of research on zoom info and ever felt alive did here again I don't care if it's accountant so i'm just trying to say put it somewhere.
And I put a bunch of information on a prospect it's going to show up right here so then when I go and do a task on this person I have this information at the ready i'm ready let's go let's go let's go to.
Question on this is is this place you paid your customers, yes, I believe that sales loft also allows you to do this.
you'll see that there's different layouts right here, you can choose different layouts in this case there's.
An account layout that's very social if I was logged in linkedin sales now, otherwise it would show me this information.
There is engagement insights it's going to focus on more how have I reached out to people in the past, what type of emails it's kind of the same process we just went through but also be clear.
I like the account notes up here I don't think it comes as a standardized area right there, so you can always go in and.
open your settings and modify this layout you can add titles remove them change the location, whatever makes you feel genuine and confident in how to approach, an account, you can do these types of things.
So CRM I know those of you would see are probably you know non headset yeah I can't I can't do this I recognize you don't have as many opportunities to customize this so just get the information, where you needed to.
put it in a consensus consistent staff, so that when you go to actually sequence, people are looking at an account and start contacting people you know where to go, you know where the information is you did the research is logged it's done.
Okay let's come back to this.
alright.
Hopefully, this is helpful so far and I recognize some of this might be really obvious.
But I see very few sd ours, who are doing this we like actually do the research process well and so they're just redoing a lot of the same work over and over again.
And that creates a lot of inefficiencies in your workflow so once you have done this research record it, this is just we talked about this is where I want you to make sure you're putting it in the notes, we just DEMO that that that section.
With an outreach, but it can be done any platform, it can be done in the spreadsheet doesn't matter so i'm now i'm talking about the contacts itself, where are some places, you could research process.
it's put in the in the in the chat a lot of this is going to be very similar last time but i'm interested what are other areas ignite prospect, or like looking at information yep different data sources. Within.
Naga more quickly now So what are some helpful bits of information.

You might find on an individual's linkedin page, a lot of you call that linkedin we've talked about it a lot linkedin as a salesperson to best friend, what is the type of information that's super useful on linkedin I think there's more than you know you might think.
You know, put some stuff on the chat.
Okay current responsibilities title last posting.
yeah okay okay awesome there's a lot of things so it's yeah if someone's active on linkedin they're posting that can be an area that you can dig into.
In many cases, you might find the gases person hasn't really put anything out there if they don't have anything listing their job and responsibility, they just like haven't put any any time into their linkedin.
But it's rare that they don't at least list where their job, history has been, even if they have no other info for you, that might be all you need maybe they were previously add a customer of yours.
That can be great information to conduct hey look I saw used to be at this company they're there they love us if you have a case study, even better, but at least calling out say.
They love us we'd love to connect with you on you know why they chose us looks like you probably weren't involved, since you left you know you left, since they joined.
let's let's chat like this is any sort of information that again makes it easy people who have.
stroke their ego I have sometimes people it's a I have an ego I have a few very old reviews or an employee or employer somebody has reviewed me.
And i've had a few sd ours, like look at that review information put it in an email that strokes my ego.
I might be more likely to respond, or at least to pay attention to the email anything that you can find on someone's linkedin.
can be important information, remembering that that information we did.
Somewhat manual to find open up look through that individual it's hard to do that at scale so when you're going after these these contacts.
Do that information do this research one set of account level open up the account do all your account research then go up and up all the prospects that might be interesting in that ad account do all your research on all of them.
If you have an enterprise account with 1000 people I recognize you want to do this in batches and 50 people or something.
But for most of you don't have a million contacts to the church per account.
In which case you should do the research on everyone, you could potentially find interesting that would be worthwhile meeting with put it in that note section and then that will help you later to determine who and.
Who do I want to go after and how do I look after them what information might give us so we talked about this already.
You know your CRM your salesforce hubspot whatever is going to have different contact lead activity previous opportunities that subscription same thing linkedin sales now super useful custom data sources all great information.
Again, this is where, for you it's important optic this information, I will show one thing.
let's see go faster one thing, just to I want actually jumped into the solution on this.
Just like we tagged the accounts.

Within outreach and within sales engagement, just like I tag that you can also easily tag prospects.
Okay, so let me think, let me, let me share that so I have prospects and I know that I have a good phone number for them, I have their cell phone.
And you're a cold call have you shot me a cell phone is a great place to call people, whether it feels.
Sometimes uncomfortable or not people answered their cell phones for the most part and that's harder and harder to do in a remote remote environment, you might tag somebody any prospect, where you have their cell phone or my tablet his cell phone.
When you're when you're at the end of the month and you're struggling and you need some meetings go pull up all your prospects that have a cell phone into filters on the prospect view say show me cell phone i'm going to just call bunch of people with cell phones.
Similarly, you can update the personas on there it's easy when you have a big accounts and enterprise account.
Okay, and this part, maybe I will serve up right now, if I am This is just going to be small, but if I have an enterprise accounts targeted to do that it's you might have 1000 people on your sales engagement platform.
or 1000 people in your CRM he'd be very, very helpful, can you can create these custom lead lists in your CRM as well, but let's go and say, I want to add a filter on the persona.
Of these people because i'm going after I today got a new sequence, I wrote a new sequence geared at people who are marketers.
Let me go in and see yep here's three people that I could go after.
These three people are these couple people I just reached out to this person I haven't reached out to him a few years, let me go in and put them into a sequence, you can choose your sequence students, you want to go after them.
Okay, so you can imagine, over time, as you're adding people into your sales engagement platform and you're doing research.
And you're adding tags you're updating stages you're updating personas this might feel like busy work, but over time, this is going to be information, you can easily and quickly determine how to reach out to these people, and it makes your your process for reaching out extremely fast.
Okay.
Second, so what I would say is is that, for all of you as a takeaway from this.
This is something like cold calling trying to get better cold calling trying to get better at emailing these are things that takes some time to just learn and get better, this is a thing that you can change right now, like you can change and figure out how to do better research immediately.
commit to putting this information and consistent spot and then try to set a goal on a weekly basis and i'm going to do 20 accounts this week.
i'm going to do three accounts per day I don't care what it is every different size of account is going to be different, but set a goal to say i'm going to fully incomprehensibly research.
A couple accounts, a day and i'm going to do it in the right way so that I never have to do it again.

Okay, so let's talk about applying this research and mentioned that we would have a little debate about this last week who's heard heard this little kind of this narrative right here this this specific personalization at scale who were ever heard this.
just say yes i've heard of it if if you're jack.
Okay, and I imagine, almost all of you have seen this, this is very hot topic on like linkedin all the linkedin influencers love fighting about this Okay, I have my own opinions that may differ, but like I think it's I don't think i'm crazy and the opinion that i'm sharing.
This is a narrative because for years when email automation tools started, even before the outreach and sales loft days there were mail merge solutions that made it very easy to send thousands of emails.
And what sequencing became a thing, where it made it easy to follow up on these emails.
I mentioned earlier, you actually got a lot of responses just by being persistent they created this false sense of persistence, but over time there's been so much noise that now exists, you don't get credit for being persistent anymore.
Like you just need following up is like if you're not doing it then you're way behind because everyone is following up on everything now.
So used to get huge response rates just by being persistent now it's Personalizing and customizing that's what gets through the noise.
that's how you get response rates that's much higher, and so the personalization at scale is this idea that I need to figure out how to personalize at a high volume.
moment be clear, this is a narrative that has like is important, you do have to learn how to do this, you have to learn how to have some sort of customization of scale.
Otherwise we talked about this before, if you only emailing a few a few people, and you have really high response rates, you still might be missing your number, because you just don't have the numbers there and the likelihood of the people, or even open your emails is so loud.
So this is what's important to this is my take on the personalization at scale narrative and.
it's far more important somebody use this word earlier in the chat it's far more important to be relevant than it is to be personalized.
Okay, so personalization scale has perpetuated this like incorrect idea that if I put any information of any sort that proves i'm not a robot if you're talking about earlier is important to do.
Then people will like you and respond and so that means that often you're hunting on linkedin saying.
Oh, this person went to college at this company, you know this area or I looked on their Twitter and they play chess and i'm going to very quickly use this information to personalize my email.
Now, will be clear, the lowest tier like a response is going to be a fully automated email i'd say barely above that.
And it takes a lot of time is calling attention to things that are not relevant to your value prop it's not necessarily relevant to the person it's just a.
here's some random information that I found about you that i'm not really tying back to your value prop like again hey you went to U dub go huskies.
You play chess that's awesome I like just to but also say is that, if you're doing this and you're not being very relevant for you are customizing or something.

These are often the emails that take the most time to write because you're agonizing over how do I find this take this random bit of information and somehow connected to my value prop.
So all this person likes chess Okay, let me think about this product that i'm selling.
chest a strategic my my product allows you to be strategic and you go through this motion of trying to figure out how to connect it it's very difficult to do.
And it takes a long time, obviously the highest tier of kind of best response rates is, how can I provide say something that's very relevant to what they're doing.
So put an example here let's say you sell you're a trainer of some sort that selling a cold calling workshop rather than if you're if you're able to find something like a job posting.
and say something the very first time I saw that your call Center job postings require cold calling experience.
Yet most of your color seem like they're right out of college, what do you do to get them that experience quickly.
We offer a cold kind of workshop to do this that's very relevant to their problem to information that's very this person is likely struggling with much better than putting you know the college or whatever else.
So more to put in here there are companies that make it relatively easy to kind of quickly understand.
The way that people like to communicate it can give you some sort of Ai recommended copywriting help I think those can be really useful I don't think that they replace the need for you to understand and research what these companies, and these individuals are going through.
i'm not alice's I didn't realize this will build okay take a screenshot of this i'm not going to go through these necessarily but.
What you're looking for in the research process, these are the answers now there's going to be customized things depending on all of you that matter.
differently to your company generally what i'm doing those these aren't just ideas of things that I think matter i'm also putting these in like what I generally feel like is actually a prioritized list.
And so, for you, if there's any last opportunities which we talked about That to me is the most important thing call out initiatives or pains the things that they told you before.
And that kind of pass relationship that may be important to reference.
Having engaged with you in the past, like you find this in your CRM or maybe in your sales engagement platform of within the activity or.
The replies, whatever it is this information to call attention to imma stop there again, you can screenshot this so very, very helpful.
To take this information if you had all seven of these things which most the time you may have zero you might have one or two of them.
Like try to focus on what's most likely to break through the noise and your priority list might be a little bit different but it's generally how I look at it.
Okay um How would you personalize each one of these channels are glad you once you've done all this research and you're going after these what How does that determine how you personalize and reach out to these people.
So I want to get a couple ideas i'd love frankly for someone to come off mute with each one of these like let's start with email What would you write in your email email differently if you do something about some of.

This might be super obvious.
So.
yeah go ahead, another email.
yeah if we use the example of like a like a closed last opportunity previously i'm.
You know i'm just looking at like, who was the primary contact on that opportunity what actually led to close the close loss bringing that up if it had to do something with like, maybe like.
I guess a feature that was missing at some point that you now have, and you know it definitely bring that to their attention if it was like a temporal thing, like the timing was off, I would say, you know, like hey understand that you were you know.
This was a priority, and you know, like when can we jump back on a call awesome.
yeah so.
Whatever is the most important information, you can find.
And in your case Matthew you're calling out the past opportunity.
This is what you want to call attention to as soon as you possibly can in this email, one of the reasons on that last list, I had a lot of kind of a hierarchy of importance.
A lot of my stuff at the top level was more account related and prospects related the reason that is is the more that you're writing emails that are very specific to the account.
means that that email can essentially be copied across other people in the account again what we're trying to do is write emails.
that are going to break through the noise, but we want to do so efficiently five got an account where I can reach out to 510 15 however many people that one email that i'm spending some time writing.
That can be super useful for me to use across other people and it's and I don't have to spend any additional time.
So if I spent 15 minutes writing in first I now might be able to use it to write it out it to someone else's sequence in two minutes, and all of a sudden i'm being far more efficient as an SDI on the phone.
The cold calls are really difficult we're going to talk about cold calling them if they're really, really difficult.
To the extent that you can make it seem like a warm call through this research through this information super useful.
one kind of hot tip I think a lot of you probably already do if you're using cold call script which I highly recommend.
If you have an email that you wrote to this account or prospect throw your cold call script out the window and use that email, you can essentially read that email.
hey john saw this whatever you said in that first line would love to chat with you about this what's your call to action you write an email very similar your emails are often your best you're absolutely best scripts.
Okay, we want, we don't agonize over these but use this previous research that you've done in these areas to then do these tasks execute these tasks, so let me do really quickly again this is going to take about two seconds you're seeing my screen, I have a task.
shop on this person we just added prospects and account notes on this person i'm going to do this task when I pull up and do this task, you will notice in these systems.

That what's going to happen is there's going to be a view of this person what's right here, you can customize this if it doesn't show up.
I am seeing the notes on this individual I also would see the notes on the account if there's more notes on the account.
I can see, whatever I want point is is when you're doing these tasks, you should not be agonize and trying to do all this work to like you should always capitalize on the work you've already done so.
go in your sequencing based on the notes, then you're doing the task, based on the notes you're not going you're trying to figure out how do I spend as little time as possible.
trying to figure out who this person is who this account is, I know exactly who this person is because I wrote it down I don't need to go back I don't even need to go through the extra clicks.
Going finding my email history with this person and then clicking on on their responses, before I don't have to do that so yeah anything that you can possibly do to save time in your taskbar.
Right.
Okay let's get back into this.
email best practices, so what is the primary goal of a sequence and, obviously, like the emails in that sequence the like the primary goal there's a lot of things that can be achieved through a sequence what's the very most important.
Okay, yes, but comedian comedian book me now and what i'll say is is a simplified it a bit, but you're not wrong for those of you set up a meeting.
you're trying to get some sort of response that is not something that some of pissed off they're not as i'm subscribing.
From you said a negative response, that means that you can't do anything you need some sort of response you can turn to a meeting.
If you can get an Oscar that's like exactly what you want, but often you're just looking to get some sort of engagement OK.
So, the reason I want to call attention to this rather quickly as what are other possible less effective goals of a sequence, but other things that can be achieved through a sequence.
You can throw these in the chat to be interested in what are other things that a sequence might do for you.
Now.
yeah might be finding referrals I see a lot of like you might be trying to get something else, some other call to action.
I want to get to the right person i'm going to just call i'm going to ask them some information see if I can dq it timeline pains, let me share one of my thoughts here too.
So these are all great and actually these are a lot of things I didn't necessarily think about for this.
This is what I was more the vein, that I was thinking of when I put this in a lot of you might have marketing or sales enabled or somebody else write your content.
Maybe they write it and deliver it to you, and they say this is what you're going to send.
Whether you have one of these solutions sales engagement or not, you often have some sort of played off of this is how we reach out to people.
What I would say he's often if it's not a str writing the sequences people are maybe have different goals than you.

I often see marketers writing sequences I am a marketer right now about run product marketing and run the scan of some of the segment what pato but one of the things it's easy to forget is that.
The primary goal of these sequences is to just get a response of some sort that doesn't piss someone off that I can turn into a meeting.
What marketing and a lot of other platforms and companies often do if it's not you personally writing it.
And, in some cases salesforce in this trap, as well as hey we have some new thing that happened in our company, I want to send a note to just like.
share what this new feature is new, this new product is or I want to educate on something some new thing that we're going through.
I had a company that was you know, had hired me to write sequences for them and they really, really wanted to sequence when they changed their company's name to communicate that they changed their name.
keep in mind, these are people that had never engaged with their company before who like.
The marketing team felt it was important to communicate this change.
SDR is like we're trying to book meetings, it was pretty clear that that sequence was not going to book any meetings like it was just going to share some info information and.
In many cases you're going to risk getting subscribers and other things that hurt your market like your ability to reach out in the future.
So, in many cases SDR is a lot of you might be being asked.
hey let me go in and drive attendance to an event or webinar or like we need to get str should be helping us do these things now i'm not saying those arts, especially in enterprise motion those might be the right moves to do, in some cases.
But a lot of you were your goal is to book a meeting any sequence, that is taking away from generating response that will book a meeting can be.
Like a net negative can be a bath in for you.
So I have a question about that.
Because it's something that we've been talking about it my companies are building our like our.
processes in our sequences is we're thinking about building out sequences for people that you connect with and they kind of give you a brush off like oh yeah I might be interested send me an email.
and treat them a little differently.
In which case we were thinking about sending more types of more marketing and sales content to what do you think about that.
So i'll say that what I should have qualified in the previous question is, what are the goals of my cold outbound sequence.
So what you're saying is i've gotten some sort of response, or I have something.
That this person is engaged with me in some way, where I might want to use a different type of sequence, to get them to convert in the future so there's a purpose for nurture sequences there's all sorts of other sequences that exist.
We will talk about those next week we're going to talk all about like different specialized sequences generally, I just want to make sure that i'm coming across here that.

There are other purposes for other things, and these purposes are not bad that i'm sharing with you on the screen right now, but what I want everyone focused on us that's my goal my email should get a response, I want to get some sort of.
Like non negative response so for me when i'm composing my email, what do I need to focus on, and you keep it extremely simple it's not my job to execute to educate on every product that exists.
I need to figure out what's one thing that I can share really quickly one value prop one benefit, whatever it is that I can potentially get somebody to engage on.
To the extent that you start feeling like you're talking and getting into explaining a lot more about who you are and all the different services and products you offer kind of cut it out needs to be nice and short shorter, the better.
So.
good way to do this right an email and send it to yourself and then look at it on your phone.
If it's easy to quickly scroll and scan to great way to get there, by the way, there are other courses and pavilion that could agonize over you know, two hours over email content we're not going to do that today this is just a high level.
This is just taking that research that you wrote, which you hopefully we spent an agonizingly long amount of time.
On the research process because it's so important, because then you can very quickly get it into your emails and your cold calls so that information.
You should be able to very quickly put some sort of your research at the very, very top of the email to prove you're not a robot hopefully it's more relevant, rather than just personalized information and from they're tied to a value profits very short and sweet.
Okay.
Certainly that's i'm just i'm not going to get into this much we talked about this last time subject clients who do important concepts, extremely important.
But I never want to forget this third component, which is the speed, the reason we focus so much on the research here is to make the speed components of how you're writing emails.
much faster some of the homework from today is going to be a do some research on account and then be applied it by putting somebody into a sequence or starting to go after somebody.
That be In both cases, about the research process, and then the email process for that person where i'm going to have you set times.
I want you to recognize and understand how long it takes me to do this, and hopefully if you're doing the research well you start recognizing.
gosh i'm actually getting pretty darn good at emailing people quickly, I can take this research, very quickly, maybe even the way you write the research when you're doing the research immediately makes it very easy to copy that to me know.
And you don't have to focus as much on the email composition part so so i've got subject lines really quickly.
see a lot of what we offer say actually is the most important thing with these with subject lines is to test test different subject lines to the extent you can because you'd be a lot of things that seem like they would work better, do not work well.

And i'm all i'm very regularly wrong, on which subject line is going to perform better and i've been i've done this thousands of times, so what I would generally say, though, as I kind of a general trends, is that subject lines should be short.
couple words, two to four or five words like if it gets longer than that even four or five of their long words gets pretty long.
I personally have seen relatively ambiguous subject lines, rather than detailing exactly what you do can be better.
So, for example, I work at this company Ricardo or and or an integration and automation company.
Instead of detailing exactly what we do, or trying to be like kind of marketing II in my subject line I might put something like.
Customer success automation if i'm going after a customer success person that's relatively ambiguous it's hard for somebody to immediately see that and really understand a lot about what i'm asking them to do so, they may just keep it there.
They like it, they might be more likely to open it, so I do find ambiguity in your subject line can be a good thing, as long as it short and sweet.
To the extent that you have some sort of data about a company if it's even if it's their company name or the person's name but sometimes I see is there.
Some piece of data from zoom info or on their website or on their linkedin that you could call attention to that just shows again i'm not a robot opening see no.
Okay long generic subject lines bad just don't do that obviously for customers reference here relationship customers a lot of you're focused on.
You know, probably new logo, but like my team, for example, is very focused on the expansion effort and it's important for us to just call out, we have a relationship with your company seller.
And do that so but, at the end of a test everything every person every industry and i'm seeing some questions.
yeah vs I think mark said that's a great question great point.
yeah if you're if you've this why it's important to test just put in there, what type of personalization you're using.
tested against something that's maybe more ambiguous and shortened generic and see what's working i've seen both work better, depending on the circumstance, so I subject lines are hard one to like draw really hard lines on the rules.
Because they perform so differently in different industries questions are merging same answer i'm going to say just test it see what it's like like in a healthcare industry.
which I think I mentioned this client last time they needed like very serious compliant times language and their email and in their subject lines, I don't think an emoji would have gotten well.
Because it just was not the type of industry for that, so I think you just need to check it out look it up.
Okay we've talked about some of these points already writing that first email figure out a way to again never duplicate your research and make it very easy to copy that in.
To increase the speed of this email spend the time if it takes you longer.
takes you longer to write your very first email to an account that takes let's say longer than 10 minutes general as.
A general rule i'd like it to take less than 10 minutes.

But if you do have a large account with a lot of people, I will forgive if it takes you 15 minutes or something to write that first email, because you can use it across lots of other prospects in the account and that will save you a lot of time, especially if it's good enough.
Okay um so relevant again very key to success, these are a lot of the same things that you saw in the hierarchy important what am I going to choose and talk about like with my hook.
In my first sentence, the piece that I want to focus on here is again starting timer I want you to now right like right now, I think you would be shocked.
If you set a timer and you like, what does that process look like, for you to choose somebody to select somebody then write an email I think you'll surprise yourself with how long this is taking you.
And so, trying to set a goal and get this under five to 10 minutes, and to do that, so that you can you can hit enough high enough volume for this.
would be super important, and if you feel like you're as you're writing that email, you need to go back to other places, you need to open up linkedin again, you need to do look.
up other data sources you've done the research part wrong, we want to get our research getting logged in spot and and.
use that in our industry couple last tips i'm just going to focus on probably the point two and four here.
I write sequences often for a living for other companies.
That being said, I think it would be surprised, it would surprise you that I would be very willing to pay somebody to write sequences for my business unit.
The reason I say that is because it's very easy for you to get into a into a area where certain jargon about your company seems and feels very natural.
And it's easy to like start thinking that that's easy and everyone will understand that.
You have certain messaging positioning that you use the market may not like her understand, so I would actually encourage you.
to write your sequence, and maybe send it to somebody outside of the industry, send it to your mom or your dad or some family members, something that goes very little about what you do.
and say does this email make sense to you do you see what reason like i'm reaching out and what you know what would cause you what's the pain you're trying to solve for.
If they can understand it you've probably have avoided and pulled out most of the jargon, the cliches enter in their email.
Lastly, this is where I see the most mistakes in emails is called actions.
I see a lot of very, very, very passive clothes closes any emails hey let me know if you're interested.
hey you know feel free to contact me here if this isn't you know, this is a pm, and we want in our email call to actions to make it extremely easy to say yes or no.
Okay, so just as an example.
This is a very long email generic subject line content isn't customized with a very passive passive close I hate this close.
Please let me know if there's a date or time that works for you or feel free to reach out to me directly at any time now it's nice they're being very like hey i'll do anything for you just let me know.

But it's not particularly easy for somebody to very quickly just say yes or no to amen now let's change this just a ton of debt.
This is a much shorter now we've caught attention to some some things in there, so that are very specific to this person, I have a relatively ambiguous.
Subject point hey i've got you've got an upcoming and college trial, but it's also probably relevant to them.
Then there's something along the lines of saying like hey I saw you have this type of trial scheduled for specific dates that I might have seen in a funding announcement, I might have seen in press releases or whatever.
Okay, I do a very quick tide of my value prop give a little benefit in there.
And then I do something that may becomes very easy to say yes or no to if they liked, and this, this was relevant to them, I don't want them to put me in.
Somewhere in my inbox email inbox to respond to later because in more cases than not, if this is outbound they're just not going to ever come back to them, so I want to make it very easy say you open Thursday afternoon and to hey are you open Tuesday or Wednesday.
For us to help make it easy for them to say yeah i'm open or no not Thursday, but I could do Friday afternoon and then it's on you to make it work.
Like, how is it structured okay so um follow up emails we've talked about this a little bit so far, hopefully, you have these automated if you don't know big deal.
follow up is against sales engagements going to make it easy for you to follow up the big thing that I want you to get out of the follow up have any of you heard of the concept of indigo G sequence it's i'm wondering how how well let's get now people view.
Okay, see some nodding heads people say no, yes, no, no Okay, this is so, this was popularized by outreach there's a guy named Sam Nelson he was a in the last.
Year was somebody to follow that I put on the last the last pavilion course sam's a good friend of mine.
The two of us in our early days it outreach we were automating like everything when we started to see decreases in response rates.
What we did is we said Okay, how do we figure out how to personalize it scale that whole narrative that we did initially go geez ag oh gee i'll put it in yeah.
This is something this is, I think a lot of this is a lot of people are just starting to understand figured out.
it's you don't have to agonize over trying to figure out like all the different content reading up on the goji sequence, let me tell you the core criteria, the core reason you go G sequences interesting to people.
The like the the context behind it is, I want to customize that first email with the information that matters to somebody.
And then my next emails after that, in a sequence all i'm trying to do is get the most bang for the buck out of that first email.
So, rather than having follow up emails that are very descriptive and start you know, creating a long thread of lot lots of information.
i'm instead replying to that first email so that I am getting so that what really what happens is, as I say something very simple hey any thoughts, what do you think so, you know I recognize there's some there's different.

lines of thought on this, but generally if I keep my second, third, fourth follow up email very simple short and sweet.
Then what it prompts people to do is to look in the thread.
To see what information is interesting in the thread, and if you put that personalized information in your first email, you want to get.
Not just one opportunity to see when you write the first email, but every follow up email after that should bring that to the surface, to essentially let you get more bang for.
Your buck for the research that you did in their email that you wrote so focused on these follow up emails is more about bumping that message scheduling a call.
So, yes, we okay Devon yeah so Sam this is awesome Okay, let me actually show you who's gonna hop out for two seconds on this in outreach or in sales loft room, they all have this exact same functionality, when you are writing an email.
whoops let's jump out of this actually will show you a different one.
You have the opportunity, when you have added a step within an email to choose do I want to create a new thread.
What I want to do a reply thread.
New thread is new subject line, this is going to not reference anything that's been set in the past.
reply thread very simple no subject line because it's just bumping the last email For those of you don't have sales engagement, this is what you're doing every day you're going into your email you're finding the email that you previously sent.
and saying I need to go and respond to this hopefully bumping this it's just a more manual effort, but still very important to do if you're spending the time to write that first email well.
Okay, we are coming up relatively close on time I think we're doing all right.
we're going to hit on.
Okay cold calls.
I think just just as a reminder, who does cold calls here to say yes, if you if you do them in the in the chat and kayla is raising her hand she's one of the people on my video.
And a lot of people doing cold calls, so does anyone now let's get a gas extraction Jordan, I should have had it for for this one.
What do you think the average cold called connect rate is OK, so this is just you making dials and somebody answering it could be, you know as long as the answer you are able to have a conversation doesn't mean you're booking a meeting was just the percentage.
Okay, see a lot of this is, I pulled up a bunch of stuff online last night to see what I could see I would say that I generally see like a six five or 6% connect rate.
With bad data gets worse with good data and maybe people buy like leads that they know, are you know phone qualified, these are people that have cell phones maybe you have higher percentages, but it's really low so.
I like I don't mean the man's point here but 6% means you have to make 100 calls to get six like to literally get six people to just answer that even to book a meeting with you so then similar.
You persona Sam i'm not sure I know that you is.
often less friendly to sales development efforts, and so it may be that it's lower but I couldn't tell you for sure.

Now, of the calls that you're making the way you actually connect can we get some ideas on how many of those like what percentage of those calls are then booking a meeting.
Okay, so forget the 6% number is just of calls that you're getting an answer to what percent are actually booking meetings.
With 25%.
code 105 percent.
interested in any other factors that's a big difference point 05 2515.
Okay got you I think depends, I think it's everyone's industry persona differently so I still would call you prospects to be clear.
Okay, so generally, what I see and again everyone's different, but the average that I generally see is below 10% of the calls of cold calls that are made in answered are turning into a meeting.
I could be a lot of a lot of reasons, maybe the person isn't actually qualified.
Maybe they're just instantly hang up they you know aren't interested last they tried to give you a false objects i'm not the right person, maybe it's actually a real objection they aren't the right person.
Either way, a huge percentages are not turning in a call into into meeting so some 10% That being said, i've seen people do 3040 50% like meeting i'd say connect to meeting ratios So how do they do that.
And just say Sam Sam Nelson did I don't want to like this, this isn't be trying to tell anything that Sam and I had a 40% connect to meeting set ratio and outreach in the early days now, is because we were really good at cold calling.
Actually bet they were just as good as anyone else with the actual cold call what we're good at is one column, but we talked about in that the minutes now, this is why research, again, is so important, real quick couple quick tips when you're making calls.
There, the solution sales loft outreach others will help you and you can screenshot this little area down there, this is for the outreach was out there.
To make it, this is where you can understand when Am I calling versus when are my prospects really picking up.
That being said, I don't want you to agonize too much over when you're calling to more important, just to get into a call flow.
If you're if you're if you're just kind of making calls throughout the day it's easy to finish the names like oh shoot I only made like 15 calls.
But if you get into a call flow it's pretty easy to knock out 30 calls in an hour or even more than that and it's more important to just do those tasks efficiently, no matter the time.
So for you to be the best type of cold caller.
A few things i'd focus on conviction, like you do need to believe truly that your company can help with specific problems, and that will allow you to be more persistent to push back when somebody is not.
When they really need you, I worked at enterprise rental car in College as an intern a lot of you probably hate the rental car experience, it is the worst and they try to sell you insurance every time.
There are instances when that insurance, you really need there are people who don't own cars, who come in to rent these cars and they have to have liability insurance like you have to have that similarly they don't have if they don't have a car, they probably don't have car insurance.

Day, which means if they crash that car that they're renting they can be responsible for handing us a $30,000 check right then in there.
You better believe when those people came in and they didn't have insurance that I had conviction.
That they needed to buy that insurance that made it far easier for me to push and push and push that you needed to sort of insurance because, like I fundamentally believe they.
need insurance and a lot of other instances I didn't fundamentally believe it and I was forced to selling that product.
and get very comfortable with rejection I would be if you're early on in your SDR days and you're not super comfortable on the phone there's not much more I can tell you then just make a lot of calls that you start getting comfortable with it.
that's like you just need to be persistent you need to do it, you need to start getting comfortable with the fact that most people are gonna say no to you and you're going to have lots of days, where you get almost no one answer.
Last tip if you've got gong and chorus or any of those solutions that make it easy to record calls if you've got top a ease and you can hear them talking about how they.
You know, handle your discovery meetings or your demos hearing them the language they use can be very just helped build some comfort in how we called calm.
So the purpose of cold cold call book a meeting prep same thing not not anything special what we need to do is book a meeting, how do we do that.
We may close this in a minute, so that we can we can focus a little bit more on here, but the most important thing for me in booking me in in booking a meeting on the phone.
Is not to focus on I need to perfectly pitch my product it's not for them to understand exactly why they're meeting with me.
If they're asking lots of questions that can be a good sign, but it can also start getting confusing on the call when you're like nervous and you're answering the questions.
You can start to get into this mode where i'm answering a lot of questions and like shoot now they might be less likely to take a meeting with me.
Because i've answered some questions and i'm just suddenly like giving them too much that they are managed the mess that I want so okay awesome there's that we put in a webinar here club COM where where this is great and so.
cases I can never do that to them, so the The thing that I would say here is that ask as quickly as possible for you, for the meeting, and the reason this matters is that this is a way to get an objection quickly.
your initial response when you ask when somebody asks you hey you want to buy something you want to jump on a meeting whatever is better now.
But often you'll say why, oh no We already have a competitive we don't have the budgets not seem to me Oh, this is an initiative Oh, what are your initiatives.
Oh what's you know what's your focus or Oh, you said this initiative, I thought that.
This you know you mentioned this on your linkedin this is super important to you, like you know help me understand that you know the reason why that's the case.
If you can get out objections quickly, then you have an opportunity to resolve them.
And from there you're removing obstacles as to why they're they're going to book a meeting with you so to the extent that you can cold call get this information.

get their objections out and then keep going back to the ask this is where you start getting to be a really great SDR So if you know something about the company if you're calling them and i'm going to skip this.
If you are calling them and using the script that you wrote in your email right you already have the research you've got the notes it's sitting there right in front of us you're making these calls.
This all of a sudden goes from having some really generic opening that's very easy to ignore and to hang up on to instead say.
Oh, this person understands me and perhaps their objections you get very frequently that you can take off the table before they even have the chance to object, because you know what they're struggling with you know what's going on.
And so I recognize we'll have a couple minutes left here some things that I would encourage you all to do from today, and then we can open it up for some questions I know i've been doing a lot of talking.
select an account any account, maybe when you, preferably when you don't really know very well today, but like you'd like to target more.
go through the process I mentioned started timer start researching this account mark it somewhere I don't care where you do a.
Market that hey i've completed this so you don't come back to that account in two weeks and kind of look back into and spend any amount of time looking at it.
do the same thing at the prospect level stop the timer and see how long it takes.
Hopefully you can get into a cadence where it takes you 20 to 30 minutes to do some of these accounts you spend an hour or so a day researching your accounts and the rest of the day, completing tasks associated the prospects.
In those counts, then I also want you to write an email, and I want you to again.
set a timer let's see how long it takes, and it may even be interesting for you to try to write an email to somebody on an account that has not been researched.
And then go and do their account research.
and write an email to one of the prospects there and see what the differences and how long it takes you to write these emails.
And I think you'll be shocked and this is where you'll start realizing oh i'm going to give myself a lot of time back in the day, so.
Hopefully, this is helpful today, I recommend most of you probably need to hop off any kind of immediate questions or thoughts or you know any any feedback from today.
This is nodding heads saying we're all good hopefully that's the case.
Thank you very much.
Hopefully, this is useful next week we're going to talk about some specialized sequences more some of the the nine just perfectly outbound motion.
should be fine we'll dive into to the platforms, the engagement platforms again, but a lot more focused on kind of what to do when you get responses, how to handle those how to continue to use sequences and automation.
To help with some of the rest of the process of actually getting from response to booking a meeting so thanks everyone i'll hang around for a moment, in case we have more questions, thank you.
You.

may see.

Class 3
text
On cold calling there's lots of great courses out there, we could do full you know many 90 minute sessions on some of those those items, but this is more of a focus on how to essentially play the long game as an SDR and that's where we're going to really jump into today.
is more how to look at that market and play the long game with.
So how do we overcome obstacles if we've done this research we've done the cold sequencing are starting to get some sort of response.
are starting to get some sort of warm so that it's not completely cold anymore, how do we convert that market, either now I kind of convert those responses to that warm.
Or, in the long term, when timing isn't right and the nice thing is a lot of you here who just typed in how long you've been an SDR it isn't one month, and I assume that a lot of you look at it and say.
I still have another six months, I have another year I might be an SDR forever, which means that you're likely to be in a spot where you can practice, these skills and go after that same market for a long period of time.
So i'm nothing just to put in the chat i'd be interested in who, this was the homework last time, and I know it's not like mandated by the course but it's something I thought would be interesting.
Who like took this seriously dude research and account i've really took the time to research and cassie Chi reasons hand.
And what i'd be interested in is in the chat would you put if you did this, and then we might just get one answer from Kai.
Where you put your notes like because that was one of the key pieces and one of the pieces I you know I hit over and over again, is, I put something specific I put in one spot.
Okay window outreach okay awesome outreach work so some of you, I got about 40% of us had outreach 40% had sales loft another 15% of you had some sort of CRM when we did this, we did that Paul the very first time.
And so the CRM okay Sam, especially since you're in a he makes sense to put them salesforce put more account description so yeah so these, these are the areas that we want to log these notes.
And I told you, it doesn't matter where we just want to make sure that we're not redoing work over and over again.
Lastly, the email writing an email writing a personalized email after having done this research.
Was anyone if you're willing to come off mute that'd be great otherwise just put your thoughts in the chat.
did anyone time their emails and like were you surprised by how long it took or how much easier, it was to do after you did the research like anyone willing to share their thoughts of their experience.
Sam I think you came off mute so let's let's hear it.
yeah i'm happy to share so for me, so I prospect into large or major enterprise, businesses and i've got named accounts, so I hadn't really ever done it before in terms of timing wise, but I was taking probably 20 minutes.

to write a decent email because i'm very aware that my touch point with that CIO or chief financial officer.
If I blow it i'm in real trouble.
yeah.
that's a 10th of my addressable market, I can go after.
yeah.
Okay okay cool yeah I think it's I think the important thing and Sam i'm glad you brought this up is so many of my answers and my rules and the things i've shared are very much it depends answer like if you have 50 cios at your 50 named accounts or whatever it is.
i'm fully comfortable with the idea of you spending a long time on that email, but hopefully what you do is that email itself is not something that can't.
You know a lot of the core of that email can't be used on a VP or somebody else, and so it speeds up your time down the line, and so.
We should just be looking at anytime we spend a lot of time on any piece of our prospecting efforts, how do we let that pay dividends, later on, how do I use it more quickly.
Okay cool well, thank you feel free to share our thoughts and thanks Sam for coming up you for that so today i'm.
going to talk about a few things we've mentioned so far that a lot of people 80% of the market has sales engagement we're going to talk a lot about how to.
really take things, above and beyond, not just with sales engagement, but how do I, as an SDR, what are the things that I can do that, allow me to play the long game that just frankly most str don't today, so my question here is is.
If everyone could put this in the chatter be interested in your thoughts what's the average tenure of an SDR don't Google i'm guessing a lot of you have an idea of what's the average tenure.
Six months year and a half now for.
Over two years awesome so as is about 1418 months and you could Google it and get all sorts of answers like it seems like this is where most things fall in because you've got 14 to 18 months total to be an SDR.
And that's not even fully ramped right like that's the amount of time you start, and you are learning, for the first few months of what to do.
So here's the question here is how long does it take for an seo to be fully ramped most companies and fully ramped meaning hey i'm at for quota i'm expected to do everything.
Six months, four months, three months okay.
Okay, so every company is going to be different, but, on average, an SDR is generally expected to be a full quote and Mike is fully producing by about three months in.
I think in enterprise motions in certain areas of longer, but just just that's that's about where it is, on average, so if we look at that we say how long do you have full production capacity as an SDR.
To bout a year right, you know give or take a month or so, but it's about a year that you are going to be like a.
Fully ramped fully skilled str summary promoted faster some will be str as much longer we saw that in some of the chat here of people who are kind of all over the place, and how long they've been in a car.

But that's still a full year that most of you will have to prospect and then we've got people like Sam Nice, who are taking the skills and using these for a long time.
And, in many cases, are able to keep the same account the entire time a lot of you who have been seos yes i'm sure you've seen some account movement.
But generally they're ripping out all your accounts all the time you're giving you brand new ones, often you have some consistency with these accounts.
And therefore, the people in those accounts, so when somebody says something along the lines of hey why don't you follow up in three months, or why don't you why don't you follow up after the holidays, who hears that like often.
As an objection yeah so it's in sometimes it's real right we're like it's something is happening right now, and I want you to follow up in three months, and sometimes it's a push off it's a really easy push off.
Because it works, because they absolutely don't expect for you to fall in three months.
Because the 10 years really short people come after him again in six months or nine months or an SDR reaches out a month later, with no context.
And they just push them off again three months, six months, nine months or just say i'm not interested, but that information that they give you.
We need to figure out how we convert that and it's not just a follow up after the holidays, it could be all it could be a hey this isn't a priority right now we've got something else going on.
Whatever it is that they're pushing you off on all these objections are very helpful, they should go into notes.
And then, for you it's important to start figuring out how to convert on that and so we're going to talk a lot about how to do that today.
So Okay, this may seem like a completely different direction, but I want to ask this, what is the average outbound email response rate.
Okay, now we talked we went through different scenarios and week one of where I was throwing out like 25% 18% remember that I was talking about a sequence response rate, these are multiple emails calls leaked in.
This is a those are much higher percentages because sequences generally that that whole cadence will get you more so i'm seeing 2% 3%.
Okay, and let me be clear there's lots of differences in inbound email response rates someone's requesting a DEMO versus a cold outbound you never met this person to a CIO very low, but let's assume again, you can see different data everyone but it's one to 2%.
Okay, one or 2% that is a response, this is a response, now, this does not mean that 1% of those people are booking meetings with you.
it's actually much lower because a lot of these email responses that you're getting are not interested, or unsubscribe or there or push off.
And so that 1% like what we need to figure out how to do is how do we get that number better sure I could go one to 2% or two to 3% but.
Improving the reply rate is like extremely difficult we've talked about some some ways to do so, but the much easier way to play this that nobody does well.
is playing the long game on taking that information.
Taking whatever that response using that to do better read outreach to other people in the account.

Or if that specific objection or response that they give you using that making sure that you capitalize on that information in the future with that same and individual.
So we're going to talk about specialized sequences to do this and kind of specials and again if you don't have sales engagement think of these as plays are ways that you can go after these people, this is still core information that you need to be acting on.
So we talked about in.
Week, one I showed this actually exact same slide but we just focused on on the left side of this which is kind of the core SDR cold outbound sequences.
In this case, really the only difference between these sequences are, how many manual tasks, you are doing per sequence high touch your throne and calls manual emails and linkedin.
And then obviously the lower down low touch an automated touch, you may be putting a lot less manual I For those of you about sales engagement lead me to touch and low touch.
may not really be options and you're just choosing, am I going to make the additional calls here, am I going to spend any time customer customizing my emails or am I just going to send the same template I send all these people.
So the focus we're gonna talk about today we touched on this and I asked a question around some ideas of these, but I want to touch on it again.
SDR specialized sequences I really put these into two groups and we're going to focus on one group today.
nuanced called out down we'll call it, which is more of a have some sort of relationship with the company or i'm taking not just working to pick and book a meeting and looking for other types of call to actions that may garner a higher response rate.
i'm going to talk about those.
Or what i'll call a follow up sequence and i'll let go through an example of what this looks like, but this is somebody gave me some sort of response, I called them or emailed them they gave me a response, and now we need to follow up on that person.
Because i'm a call follow up sequence so just some ideas i'd love some ideas, what are some potential processes like responses that you get.
From an email or call that would prompt you to follow up that it with that individual either now or in the future.
And i'm going to bet a lot of you aren't using sequences for this today they're just an email response in your inbox and you just leave it there, so what are some potential ideas here.
kyle you raise your hand.
bomb does well we're like okay right now it's not good time, but if you call me back tomorrow at three we can have a conversation another one Where are you know budget set call me.
call me back in you know late early to late like Q4 something like that well we're deciding next year's budget.
awesome awesome and for you, it probably doesn't like if if they tell you to follow up in 369 months doesn't really matter the timeline whatever it is that's an opportunity that.
is probably a highly replicable process that you could say at that moment i'm going to follow up.
And then i'm going to have a series of follow up emails or calls or do again very much a sequence again on how do I get in contact with.

This person similarly you talk to someone like you mentioned, and they say call me tomorrow, the biggest push off ever is when you're on the phone and somebody says why don't you send me some more information.
99% of the time they just are trying to get you off the phone without being rude but that's an opportunity to capitalize on it to do what they said, and then a follow up on it so lots of different ideas here.
send me your grocery and I just thought yeah clearly I didn't even see those but yeah you know exactly you're all familiar with this, this is an example you have happened all the time.
So here's some examples and i've bolted, the ones that we're going to talk a lot about today.
And we spend a lot of time on and, hopefully, what happens is we do have a decent amount of extra time at the end of this class to kind of dive into other topics are interesting things you guys would all be like to chat more about.
But if we spend a lot of time on the sequences will have less time at the end and nuanced call we mentioned this in one of the first weeks, but.
One of opportunities for you to do is to go to those people to go try to look for some sort of referral just send a sequence, where the call to action is who's who's somebody out to reach out to about this.
huge opportunity number two how often are you getting referrals.
Every you talk to someone the phone or you get an email says, I used to talk somebody else i'm not the right person.
happens all the time right.
capitalizing on this is one of your highest opportunities to go to get higher response rates from those referrals itself.
pick up the conversation is what will call a following up on a lost opportunity, an opportunity that never close before you have some sort of engagement with your company and it's time to follow up with that individual.
And it's not necessarily even the individual individual on the APP it could be any individual at the company using the context of the last opportunity.
Call only sequences there's linkedin only sequences if someone follows up if someone know shows a meeting your desire to get them back on the books that's probably a pretty aggressive process to call an email them to see what's going on.
I think Raymond or so somebody mentioned and nurture sequence before where it's you've got a longer period of time to to follow up with people the follow up sequences which i'll define actually DEMO this in a moment.
is more of a focus on how to follow up with that split with her apply Okay, these are send more information, this is any sort of reply, could be a not interested replying your email, and you want to say hey.
i'm surprised you're not interested, this you know I thought you had this going on.
Let me know if I wasn't clear in my previous emails there's no reason to just shoot that one off email as a prayer as a hail Mary we should follow these people, these are people who are emailing you back or giving you some sort of response.
The contact in the future follow up is a big one, is a huge one, and this is how you this is how you build a predictable pipeline in the future.
Okay, so if you did not have sales engagement platform.

These are still the same these are still processes that you can all follow Sam you know you've got this and salesforce you can add tasks on these individuals, you can manage these out of your email.
I have not always had sales engagement in my current role my current company i'm not a sales engagement user, but I still manage relationships and people.
One of the things I do just as a tip for a lot of us, you can within your outlook or your gmail go to your settings and organize your inbox to say if i've labeled an email a specific way I want it to show up in a specific folder I want to show.
Up maybe in my core inbox.
So often, if you send that first email, and you want to follow up on it.
You could just have a process for going in and labeling those emails having to go to a very specific folder you can even create rules around this.
which then makes it very easy for you to go find those emails and follow up and specifically way later on.
So I just I don't want people to do get discouraged if they don't have sales engagement, the people who are using sales engagement don't use the sequence as well, and then hopefully after this class, they will but there's still opportunities for you.
Okay, so let's talk about an actual follow up sequence, and how a lot of these platforms make this work okay so i'm going to hop out of this real quick.
let's go to.
Okay, so we have you've all seen by now sequences Okay, and for the most part, these sequences.
let's go back out of this one and.
Okay let's just do any sort of sequels most sequences you'll notice and we showed this the first time start with a new thread.
This is, I am writing an email to this person, for the first time and i'm going to reply to we noticed that there's the opportunity to have a reply thread.
Okay, and that's where we're using later on in the email.
we're bumping that first email, this is that concept of the again my buddy Sam at outreach has called this the goji sequence.
But the theory behind it is, I spent a lot of time customizing this first email i'm going to make sure that my follow up emails are replying to that last email to keep it in thread so that I get more bang for my buck from that very first email.
Okay, now the reason i'm calling attention to this, and I know we've already gone over this is to call attention that there are also sequences where the very first email step of the sequence does not start with a new thread.
It starts with a reply.
Now, if I put somebody in a sequence, for the very first time I have no new thread i'm just adding them to the sequence let's watch what will happen.
And again apologies to those of you who don't have sales engagement, you have to worry about this, but again, that the principal matters here.
We want to use the information in thread as much as possible, and when somebody writes something down the email to us, we now have essentially a written contract of something that they told us, and we want to capitalize on what they said, imagine.

And so I was to go in and to add somebody to a sequence, that is a follow up sequence let's go look right here contacts in the future sequence.
And it's are applying to something that doesn't exist there is no new thread where you're going to see here is it says hey.
I added this person to the sequence, but it failed, there was no new thread for me to reply to.
All you did was reply does that mean everyone generally understand that concept of how this works there's these new thread sequences.
Where i'm going after someone for the first time, then there's these follow up sequences where I need to use it on a reply and i'm going to show you how to.
Okay i'm gonna go to this person real quick to that Stephen farnsworth individual right here, and then the deployment of sequence, otherwise we won't be able to add him the more sequences.
All right.
Okay, so that has failed so when would I use this follow up sequence it's these situations that we already talked about, I want to put someone into.
Some sort of follow up sequence we'll talk about that, for one, send me your brochure that Linda sad or kaylee send me more information, something that's very, very common now have you without sales engagement.
Listen up because it's the same there's lots of opportunity to make things easier, first of all, when you are sending somebody more information.
How often you're going and finding something in your email and say what did I send in the past, like what you know, this is, I need to find something, are you going to a lot of you might have a high spot or a seismic and looking for some sort of templates.
Within these platforms or within lots of free email tools, you can create if you've got hubspot or salesforce a lot of them have inbox tools that allow you to have templates within your sales engagement system, you should be creating templates.
Of what are the most common things that you're responding to whether it's a send me so send me more information, whether it is a.
can contact me in the future, not interested, what are the things that you say as a response to that, so in this case let's pretend, I had a conversation with Stephen.
I can pull up a template two seconds that says hey here is this information I can quickly customers or personalize it all, I want, but before I send this before I send I can come in here and add this person to a sequence.
And what this is going to do is this is attaching a sequence to a new thread that i'm writing right now.
This also would work and i'm going to show you in a second So if I wanted to go in and add this person to sequence it's going to happen is the first step of that sequences.
Which is a reply is going to follow up with this person okay let's close out of this from on.
Similarly, if we went to the same guy Stephen you can do this in your gmail your outlook or within our reach itself, I can look at an email this person responded to me hey.
i'm definitely open to learning more can you follow up later obviously we're past June so gosh we missed this one we've done a follow up now it's easy to come in here reply.
and say something along the lines of oops we missed this one when can you chat.
And again out a follow up sequence on to this.

Okay, have people used to have any of you who have sales engagement before have any of you done this before use these types of sequences.
and forget the concept for a moment of follow up sequences but have you once you've gotten a response from somebody either a year ago, or now used sequences to follow up with people or for the most part D kind of stop on somebody replies you stop using sales engagement.
Okay, and I know some of you who aren't using sky you have okay awesome.
Can you tie willing to share like how this is if this has been beneficial to you or if this is where you know what what what the phone has been.
Oh, I see so i'm new to the game right only four months in.
As I said before, but what I have been doing over the past few months is I just create like a blank you know decide what step the side sequence, where you know and they're just labeled differently right this person said follow me follow up in three months or this person said.
Well, so that you referred to, from another prospect, so when I have these different buckets and other side and the idea is that the more I do these things i'll start setting up.
templates where you know we can auto fill you know contextually but so far i'm still like trying out, you know different you know different buckets which ones are worth keeping and or developing a pre written template over.
cool okay.
yeah.
yeah I think there's there's lots of different ways to handle this actually Sam just did a good job here and saying hey we don't have sales engagement, this is a campaign and salesforce it's run by partner marketing team, I think the.
Decision Sam that you and any of the salesforce or CRM users need to make here is.
Do I want marketing follow up with these people, or is there, somebody here, I want to call them what do I want to do.
And if sequence is not a possibility add a task to that person in salesforce the issue being, of course.
Once that task is over, I need to now again go create another task to follow up if they don't follow up and to create another task to call them, whatever it is, so you can see why sequences are more beneficial.
But there is at any point in time, you can always go in and click to add a task on an individual if you're.
In many cases at enterprise companies or enterprise customers, you get worried about the concept of using sequences you maybe automation scares you a little bit that's fine.
In which case, go in and use a new task and set that task up to make sure that you don't forget this stuff but I really do want to encourage.
encourage you, those who have this type of information have this technology available to you, you should be looking.
To sequence anything and everything you can, because every time you're adding any sort of automation whether that automation is actually sending automated materials or at least queuing up tasks for you, that automation makes it easier for you to manage your funnel.
So, Michael use the the term in here I love it usually stop would love to keep the drip drip and.
that's awesome like that's essentially what we're trying to do is we're trying to put a lot of our day to day on autopilot so we're not trying to remember hey I have.

15 people a month that have told me to follow up in the future, or 10 or whatever that number is that becomes a pretty long list of like what I would say, highly convertible people.
that you do not want to lose this is where you go from being like an SDR that's barely making their number every month to all of a sudden somebody who is.
putting their like essentially meetings managing their pipeline like an eight years you have warp now, and this is future pipeline future bookable meetings so okay.
I really do, and I think if many of you are having these these conversations over the phone.
And somebody tells you something hey well you know let's here's a referral or follow up with me in the future this isn't a priority, now, to the extent that you can send an email immediately following that documents that conversation.
That says hey we just had this conversation you mentioned to follow up in the future i'm going to go ahead and do so.
You want to as much as you can use their own words to capture them in the future, it becomes a lot harder for them to ignore you or to say not interested, if you have documented somewhere in writing.
That hey I should follow up with this person the future, you told me to do so.
Obviously it's a lot easier when they have written something in threat and that's why these sequences are really important is capturing essentially their word what they wrote and making that a binding contract.
becomes a lot easier to convert on those people in the future okay so yeah whether it's a task, a sequence whatever, this is just really, really, really powerful and I want you all to focus heavily on opportunities to sequence more in your day to day let's go back to the presentation.
Okay.
we're going to go over a few awesome examples of how to do this so whenever a prospect points you.
Actually, right here Okay, so this looks talk about the person I told you out we'd go through three bolted sequences that are extremely important.
When ever somebody like a prospect points you to somebody else to as a referral, the first thing you should do instantly is called him but hey.
It makes sense that that could also be a sequence after you've called them let's go find an opportunity to to reach out to this person contacting your referral sequences by the absolute highest reply rate of anything you're going to get.
How many of you, and I would like to put this in the chat or raise your hand get a lot of referrals on calls or I need somebody pushes you some.
Sam you're reaching out to the cios I have a hard time believing too many of these cios actually then take the time to meet with you.
If you they do congratulations awesome I think what's more likely is that they're giving you.
Like a push down to somebody else is that is that generally correct sorry i'm asked i'm pointing you out because I see you're you're one of the few faces on my screen but i'd be interested what you do there and the cios what you're looking for.
yeah we do so, I do a lot of outreach emails to cios to try and engage with them as we're going through sort of early stage.
Early early stage sales process and it's not really asking them for anything is more.

keeping them in the loop rather than asking for them, so how are we working with experts, and this is the strategy, this is what the go live plan looks like, and this is the way it's going to impact your.
strategic priorities for this year that we understand is important to you, and these are the metrics that support it so.
I do get brushed off a lot but it's usually much more we don't I don't usually ask for anything it's more keeping them in the loop because yeah.
Past experience has shown that if you ask for them they'll brush you off, whereas if you keep them in the loop though actually try to get involved.
And typically they'll get brushed off to managers or directors or people below them.
which actually is quite good, because normally it's a jump up for us anyway, from where we enter that account so.
yeah normally I just forward on that email to set director saying hey the CEO said we should talk see below let's out 10 minutes, this is the reasons that we're reaching out to you.
yeah referral i've always loved referrals personally.
awesome so you're playing both games what's nice here as you're playing, but the i'm a smart guy he who's doing a good job multi threading into an account and making sure the economic buyer is interested in understands what i'm doing.
But then also to your point by doing so, you may also get pushed to other people who are important for you to reach out to okay so getting like whenever you're doing a just.
Everyone here should be really excited whenever they get a referral and again, that is an opportunity that's a point of warmth.
That says, I can take that and I can go convert at a much higher level than my cold outbound email and then at outreach we had a 50% 54% reply rate on our.
Our for sequences like the sequences that we use not to get a referral, this is to contact the referral that we got and i'm going to explain to you some of it like actually show you the copy and.
Like that we use that and why I think it's really important, the one thing I would I would caution you hear you hear quick.
There is a distinction that everyone here should understand of real and fake referrals.
Okay, and what I mean by this when you call someone or when you email someone and you are a salesperson bothering them.
No one wants to listen to you or to get on the phone with you for the most.
For the most part you're a bother to them, it doesn't mean you still certain go after them you've got something that's beneficial for them, you need to have conviction for that.
But people your prospects don't want to be the right person that Raymond zachariah, this is a very good brush off and outreach.
Get I was at outreach I sold technology as an SDR to sales leaders, it was so common for me to call a VP of sales a CRM.
SDR manager, whoever people I knew.
Where the buyers that would then say oh yeah i'm not the right guy why don't you talk to our CRM guy or why don't you talk to your sales OPS just simple like that that was very, very common.

The only because the people that they gave me whether they're good or they're not like whether they're the right contacts that I can also engage or not.
it's important for me, not just not just to take that referral and be super excited about a lot of the times we're just excited to get everything.
You do need to make sure that we're going to talk about cold call injections today.
But you do need to have in your back pocket what happens when somebody offers me a referral, and I know they're the right person.
what's My response to that because you should have a response that says something along the lines of like hey I really appreciate it super happy to loop them in.
But i'm calling you because I believe you have the responsibility for X, Y amp Z.
This is what we help with, and so, if this is your world like i'm happy to talk to talk to your technology people or your other person, later on, but i'd really like to go through and share, you know why this could be so impactful and important for you.
That should be like very much an objection that you're very, very comfortable you've got it on the back of your hand.
So make sure, so the contact referrals again we want it we're going to talk about the play to get them, but just make sure that this isn't you don't all of a sudden jump for joy every time you get a referral.
Because often It means that you're just getting brushed off really effectively so let's again come back in to outreach for a moment.
And I will show you an example of i'm still seeing my screen i'm.
jumping around a lot today on a referral sequence sometimes the.
methodology or your thought is I got I got an email response from our side, you know the CIO told me to go and contact one of these individuals.
When I go email that person I talked to them, I need to give a lot of context as to why this person thought this made a lot of sense for me to reach out to them.
On the flip side, we talked about this in our last meeting and I want I want a bunch of answers in chat real quick, what is the primary purpose of a sequence.
or a cold call for that matter.
book a meeting right it's not to pitch your product it's not to perfectly explain exactly what you're doing and why you're important, and you know what the pain is that you solve to book me.
Okay, and so you have to get connected, whatever it is, like you, our job is to get these people on a call and so you're going to notice something, and you don't have to use this exact language.
and actually just for fun i'm going to put this in the chat so people have copy to refer back on Okay, and everyone can read this carefully if it's if my screen is small, but this is should be the gist of what you've said.
john said we should talk Sally said we should talk something again that subject line you want it to be no not just the 30% open rate you want it to be 6070 80% So how do you bring that name out right there.
In the subject line so if it's open next you'll notice this email is extremely simple it says, you know essentially nothing about my company, if you feel really compelled, or you feel like you need to say something, while it's fine.

But you'll notice this is extremely simple hey john Wilson sentence talk love to show you what we're doing here and why john gave me your info.
Do you have time.
Stephen I have a.
quick question yeah.
it's pivoting a little bit, but it's on this note, like, I really like the simplicity of this response when you get a referral like you're not trying to throw info at them.
And brush off that I get i'm sure, a lot of other people get or like like obviously send me send me an email or send me more info would you take a similar simple approach, where you have to be like.
I think it would be much more fruitful the conversation to have over the phone or would you actually send more info or like just like are you still taking that angle of just trying to get a meeting, or are you going to actually give them more information, I guess, is my question.
it's a great question if somebody says send more info you should your alerts should go up in a in your call and know that.
This is just going to be a waste of time if I send information there's a 98% chance to never respond to me.
When I send this information, it goes into the ether, they say they're going to forward it around it's not useful and so anytime you get any sort of objection.
You need to first think through in your mind is this a real objection, or is this a brush off.
And a real objection, I think, where you like you personally and that's really valid they're they're busy doing something they're working on something.
That you know, would make us not really a great fit right now, so therefore i'm going to take that and i'll make sure that I keep a good relationship i'm going to capitalize on on what they told me in the future.
when somebody says something along the lines of send me more information on the phone call your alerts should go straight up and say there's no chance this person responds to me.
So obviously I do want to send them that email if I can't convert them right now that I am going to send them to that email and i'm going to make.
Every attempt to make that process extremely fast, which is why we talked about templates and sequences to follow up with these people, these people so you're not putting much effort into it.
But, more importantly, I want in that moment, I need to have in my back pocket, what is it that I said.
hey send me smart hey happy to send us more information.
But you know how about this to really hard to understand what to send you just without understanding, a lot of the context of your business.
would love to chat with you for 15 to 20 minutes or whatever it is, you have a.
chat with you for 30 minutes to walk through and share a little bit more about what we're doing understand more about what's important to you then from there, I can I can send you all the relevant information, you need.
So I mean it's it to the extent that you can ever take something give them like give them that say absolutely happy to do that, but how about this, I actually love, this is not going to be part of the training, this is, this is a cold call training.

And it would be completely separate but those of you, if you've never said how about this on the phone.
It is like the ultimate compromise sounds like a very compromised sounding language that if you say it in the right tone, you can essentially go from hey you know.
Looking to schedule a meeting with you, and they say oh i'm not interested, or oh i'm not this or send me some more information or whatever.
You can come back to them and say something along you happy to do that, but you know how about this, why don't we.
Do this instead and then ask for the meeting again and it very much feels like they're compromising with you because you've given them something you're promising to send them.
More information or you recognize their budget is in the future, so you know how about this, why don't we instead shout for 30 minutes about what you're focused on right now how we could potentially be helpful in the future, so that when you do get budget.
We can chat them and you'll be very important, so to the extent that you can make it feel again, you want to feel like you're on their side, and you are because, again, ultimately, you have something that would benefit them.
But, to the extent that you can use language like that and use really just soft.
You know conversational tones on the phone it'll make your life a lot easier, so I know that was inside i'm ready to go.
That was perfect and then I think I saw on your linkedin you finish that with a is that fair or or do you think that's fair, I think I saw someone commented on one of your linkedin posts.
All right, yeah and like yeah do you think that's fair sound sound fair whatever it's like yeah it's it's you just want to it as much as you can.
It feels like you're compromising and so to your point, the concept of fair actually makes a lot of sense being like it's that sound fair like let's do that instead.
So all right.
So Okay, but simple what we want to do.
Is not agonize over this stuff what we want to do is capitalized on the warmth, that we got in with a referral, we want to keep it short and sweet sweet and easy to say hey john said we should talk about.
The one thing I do want to make sure you're careful of is sometimes I have seen emails.
Or is it people who are really so desperate for a referral that they're kind of making referrals that have nothing.
Like what you don't want to happen is obviously if I got an email that said john said we should talk there's a decent chance that I don't just instantly respond to that I go slack john and say hey john some guy reached out.
You know why what you don't want to do is you don't want to in any way do anything that's unethical or creating any sort of like you're looking for warmth that that warmth does need to be something that's real.
And so that if you do get called out if it if the connection is made in the background, this doesn't you know give you a black guy doesn't look that so okay let's go back to the presentation, but for you, I just I think the core point that I hope you take away from this.
Is we'd have to come down and the core point I hope you take away from this is that.

it's not your job to fully educate on why you should be talking to them that's the point of setting the meeting is, then, for your ad or, if you are the.
Two then explain in a conversation where they're ready to sit down with you to do the proper discovery to do the pitch well so that that converts in the pipeline if that person that was referred to you is the right persona they are the right time.
Okay.
Alright, so here's what I want to care to share here is one of the things i've been really surprised that, in my time doing sales development is that it really does not matter that much who gave you the referral.
Now, in sam's case where he's getting in some cases, some referrals from the CIO from very senior leadership that's awesome obviously it's better.
If your boss says hey meet with someone you better believe that people underneath are likely to respond and meet with them if that was a real referral.
That being said.
an operator a janitor an SDR on the company sales line if they are giving you any sort of referral they're saying hey you know i'm not the right person, but you should talk to this person instead.
That is still a much more effective way of breaking through the noise much better than cold outbound and so, if you are calling operators that companies, if you are calling the sales line anything that gets you through, and you can get a referral from someone.
don't waste that conversation you're having with an operator trying to understand who you can get Ahold of don't waste that conversation talking to the sales line.
see if you can get a referral because that referral, even if it comes from, maybe that somebody this low it's you know relatively low on the totem pole that still somebody you can put in a referral sequence.
Okay, so just take that like truly a huge percentage of the meetings that i've sat.
As an SDR where because I talked to an operator who manages this sort of technology or this process and they said oh that's you know Steve that's that Sally that that's the person, you should probably talk to say great.
and put on your seat referral sequence talk to you know talk to Judy at the front desk talk to john the front desk they said I mentioned this, then they said I should chat with you when can we talk again so much more effective and cold.
Right let's see how we doing on time okay we're doing really good.
Okay, so the next section is going to be two slides in a little bit of a DEMO This, to me, maybe the most important thing that you can do to build.
Like future pipeline to get out of the rat race of an SDR, and so I don't want to like this next little bit, I think, maybe the most important thing, it would talk about the last three weeks.
So even if you don't have a sales engagement platform think about how how to do what i'm sharing in a Google Doc in air table and CRM a project management system, most of this is completely possible to do and other systems.
just maybe a little bit less efficient, but no people very few people sales engagement are doing it so it's still a huge opportunity pick up the conversation.
So we talked about this, this is converting and closed last opportunities, how many of you here.

have some sort of CRM report or some access to all of the closed last opportunities at your accounts opportunities, where you've met with them and pass kfc a thumbs up anybody else I see some nods david's on his head Okay, a lot of you have these.
big part of being an SDR is identifying what's low hanging fruit that I can go after.
People who have met with you in the past, and in many cases, you have notes on why they didn't convert or what interested them initially on on on meeting with you, initially, these are extremely useful to be able to.
go off of again log this research, this should already be information that you've you've logged in you found, and you put in your outreach notes or your CRM description or whatever.
But putting these notes the account prospect level, but then let's put it to work and pick up the conversation is putting to work.
That information on this closed last OPS so let's not be fooled by the sequence itself like none of these sequences that sounds like the specific process.
Of like here's the email cadence and here's the email copy I think a lot of us start saying hey, this is what actually converts it it's the process of gathering the right information using that well in my first email and then following up with these people.
Okay we're using that same thing in a call so let's go out.
So one of the things i'm going to start by saying is that process of of.
of researching your accounts beyond just putting in notes.
And Sam and those of you who have CRM that are doing this as a lot of custom fields and fields on your on your CRM level or it becomes really easy to filter accounts.
The same thing exists in sales engagement, but also something that I think is a little bit more usable for us we've talked we talked about this morning, I think, last week, our tags.
Okay becomes very easy to tag accounts and i'll show you how to do so, just as a quick reminder but let's just pretend, I went through and I found on my last opportunities and I put those last opportunities in my notes taking it a step further.
I might want to tag all of my accounts that had previous lost opportunities.
With that tag so then it makes it really easy to go imagine, this is a fake database so it's really limited.
Plus pretend I had 500 accounts as an SDR and I wanted to find out the 50 or the 10 or however many were lost opportunity, so in this case there's two.
Two right here that have lost opportunities, these are really low hanging fruit, these are good people if i'm if if these accounts don't constantly have people in sequence or i'm not constantly in contact with someone here trying attempting to go after them.
that's a big mess I should be going after these customer.
So.
Let me do something, right here i'm just going to make sure i'm demoing this correctly so um.
Alright, so I filter these accounts by some sort of information in this case it's a lost opportunity in this case let's say that I want to go after acme corp.
And I want to see who's in here, the first thing I do again if i've done my research process correctly i'm going to look at my notes specific account, so it doesn't have a lot of useful information.
But I look in here and say first of all there's one person that said default in June 2022 but right now we're looking close opportunities i'm focused on that.

I look at this guy in the past and say well this guy met with us in January of this year.
about our payroll solution, but was in the middle of a big project, and so this might be a priority last last later in the year it's now later in the year let's go follow this guy becomes really easy for me to click this individual.
i've already seen the information instantly put him into a pick up the conversation sequence.
boom done he's in.
OK now let's show me start the tasks here to show you what this first email looks like and again a lot of you, I can put this in the in the chat again and, hopefully, this is actually somewhat useful what's the chat you're welcome to.
Okay, I just put this I put it in the chat so you have this some form of this so here's what i'm going to say again.
i'm not agonizing over re pitching and sharing my entire solution i'm just trying to capitalize mostly in that very, very first sentence of why i'm reaching out.
hey we connected back in January 2022 about what's called pavilion in this case, at the time you'd mentioned, you were in this in the middle of this big project and wanting to chat later this year.
So Is this still a priority, you could ask that, frankly, that this this this question that you see right here in many cases, I might not even put that in there, I might just say you mentioned, this would be a better time excited to chat with you when works best.
New to have next Tuesday available there's no reason to go agonize over sharing and re pitching who you are the guy told you, the person told you to follow up later on.
So one of the things I want to say is that let's pretend john there are a lot of you who might be looking at last opportunities and say.
We were working with this person, but they're not there anymore how often does that happen.
Like these people move jobs, of course, that people move jobs in these companies like every 18 months two years, like it when people change all the time, so.
Instead of saying oh shoot that's that's over there's no reason not to go and pick somebody else in the account the right person, the person, maybe who even replaced john.
and say hey we're working with john back in January on a project, but he had a few other big priorities that he mentioned would be finished my understanding is those are finished would love to chat with you about this, or is this now and bigger priority.
Again, creating a warm drawing and warm from previous experiences so you can go to lots of other people if john himself you don't if john is still right there buddy stonewalling you.
Which is also going to happen all the time is people, maybe they gave you your at a push often said s isn't a priority let's talk later, but they didn't really mean they just didn't care.
it's not crazy again to say hey we were meeting with your company back in January I built this sort of solution, I think it would be really relevant for you, if this other project or this other initiative is now finalized but chat next week one works.
People saying this, and people done motions like this before like if you have.
i'm hoping that what you see opportunity now is to make a sequence out of it to use it, so that it's highly reputable you can do it over and over again, and you can tag your accounts, you can use the research to make this a lot easier.
Okay.

All right, one thing also say it's not crazy let's say it is January let's say we're having this conversation in January 2022 i'm going to go in and redo something and show you something that you can do.
And this is something that you absolutely can do if you don't have sales engagement as well.
When you add somebody to a sequence or when you email somebody and outlook or or gmail a lot of these lot of these companies now have functionality, where you can schedule a future sense.
People seeing that and like I know gmail does that I assume outlook doesn't or you can write up an email create a draft.
click to schedule the future and essentially click sand and it'll go out on your behalf in a week or in six months doesn't matter.
We can do the exact same thing if I just if this meeting just close it was something like close loss you're monitoring that report, and you see that john said to follow up in August or later in the year it's not crazy for me to instantly go in do this email or.
let's see right here, I can come in here and say, I would like to change when i'm sending this well, I would like to schedule that first email in the future, so this sequence, I could easily go.
and say yeah I want this to start on October 4.
I want this email to be sent, so this is how you put your future funnel your future pipeline, building on automatic So then, and you forget the john stamos even exists and one day in October, you get a task that says hey call john he didn't follow up on your email.
They say oh let's I let me quickly understand who this is Thank goodness i've got my prospect notes and account notes right they're done, I also can see my email history and use that as my script hey john back in January, we talked.
Now it's time to chat again and I hope this that this is more of an initiative initiative now when can we talk.
Okay.
All right, let's move on let's go back to the presentation, so you guys can't see this but i'm like moving the chat and the video and all the different zoom stuff so I can flip around between these different platforms and areas.
Okay, here we go Okay, so now let's go to the next sequence, first of all, can it can people, I know that this is a difficult.
area to like be super chatty on this, but like would anyone be willing to come off mute and either share how they've done something like this in the past and either been very beneficial or just share how they intend on maybe taking this this action in the future, I taking this advice.
Now force you to come off mute, but this is, I hope, what everyone's seeing here is either an opportunity to do something different, in the future, or there's just more of an internal like.
hey i've done this and yeah I can, this has been really beneficial for me and I had to do it more
Okay, whether you have sales engagement or not next now this right here.
contact in the future follow up sequence i'm going to DEMO this and show you how to do this, exactly, and how I did it.
um, but this is more i'll share more of a story time here, but the most frustrating thing I think about being an SDR.
And for a lot of you out there, unless you've just been somehow been really, really successful so far.

Is that you are living on a month to month basis you generally have a monthly quota I assume the ease out there don't have a monthly quota it's probably a quarterly quota, maybe it's my first time you're shaking your head or you do have a monthly quota.
But whatever it is a lot of either monthly or quarterly like it's rare that.
You know it's as an SDR and a prospecting and it's rare for you to have longer than a month okay okay Sam.
Because he's a he has a little bit longer to be able to close deals it's makes sense to be able to have a longer time frame, but as an SDR there's this one month long rat race that generally exists.
And it's very, very frustrating and it's very difficult to get out of that rat race because, for the most part.
You spend your entire month desperately trying to get to blow up your get across the line at the very last minute, or maybe miss a bit.
That first week back in the office when you start back at zero and the beginning of the month. there's this kind of sigh of relief that says okay I barely got there, maybe let off the gas a little bit because you frankly got burned out, we saw the average tenure it's a very you know relatively short 10 years as an SDR so it's high burnout culture.
I think, someone I think Linda or somebody said there, there have been here for five years, like that's really very impressive because it's it's difficult to do that long term.
So my biggest advice as an SDR, and this for some of you who earlier on, I think I you said you've been four months and and some of you might be.
In this like at least the ability to do this as maybe a little bit easier, but my biggest advice would be to go super super hard that very first week of every month.
So I can throw caution to the wind and say i'm going to go crazy i'm gonna do so much activity i'm going to do anything I possibly can, so that I can hit quota early.
And that's easier said than done, but like anything you possibly can, and here's why and it sounds so obvious.
If you can get to that last week of the month and you're essentially at quote already all of a sudden your managers off your back Okay, they care less about to your daily kpis your calls your sequencing whatever and you can spend that last week of the month, assuming you're at quota.
Doing high value things this is building sequences this is researching more this is identifying low hanging fruit when you know past responses are closed opportunities.
And it allows you in that last week of the month to set meetings early on in the month and still go really, really hard.
So that, then you can change essentially all you're trying to do is to shift your schedule back so that you're hitting quota at the end of your third week of the month, which gives you that last week of the month to not let off the gas.
you're still working extremely hard but you're spending that that week doing high value activities that will set you up for the future.
Okay, the reason I bring this up is that one of the easy ways to find low hanging fruit.
is to do some of the things we talked about like going through researching tagging people, so it becomes a little bit easier to to engage these people more easily in the future, one of the tags that I use most frequently because we hear it so often.

Is the hey follow up in the future, tell follow up in the future follow up in three months follow up in nine months follow up after the holidays, how many people here i'm very near are already hearing follow up after the holidays.
Is that a response you're getting your follow up next to your budgets are frozen like we've already dedicated bro about sam's getting all the time david's getting all the time.
This is a super common response past come back yeah I mean the moment you get yeah come back in September it's whether it's three months out or if it becomes towards the end of the year, you start getting a slot.
The fall around now from three months ago yeah exactly so you're starting to fall thanks for all these responses new fiscal budget budgets are.
People have mostly made their budgets, and so a response to perhaps pull that in now is to say hey look you're going to start making budgets, the beginning of next year, maybe at the end of this year, we ought to be on your radar.
But for the most part, people are going to start kicking it down till till January, February so it's going to be a hard thing for you to get as much pipeline now.
Okay So how do we convert on us.
So here's we're going to talk about here's what we're going to kind of DEMO and share this.
Which is move something a little bit over here okay.
So one of the things that I would do if you remember these people, and I know it's hard to retro actively do this but, like, I think you ought to think about it.
Is there again people to put in your descriptions if you're in CRM to find some sort of field that you could use this for some you know, do something where you could go in and mark that these people have told you to follow up the thing that I always used is I used to tag.
right here.
called future felt, you can do whatever you want can tags are for you you're not making much Linda don't worry about I saw your you're taking off that's fine.
But future follow the more that you can tag individuals as hey they told me to follow up in the future, this is my hotlist.
These are people that I should be going in engaging with, and I should be making sure that i'm spending extra additional activity on those people.
So, just in case, people are not aware of how to add tags, because I know it's been two weeks since then you can add a tag right here similarly when we're on an individual just come back row real quick.
The tags are right here it's very easy for me to just go ahead and add new tags so you'll notice, though, that taking it a step further, instead of just having a tag that says yes, this person told me to follow up in the future.
In some cases actually might have gone the additional step and said When did they want me to.
They told me to follow up in August 2022 For those of you who are just starting to get pushed off towards the end of the year, this starts getting really interesting if you have a follow up January 2022.
You might start getting a long list of people who said that and then in January sure, yes, you want to have these people on sequences.

that's also a really engaged list of like those people deserve extra calls and extra you know lots of extra activity on those people because they're highly convertible so let's look at just my August 2022 people.
Man here's two people that I should spend more time on so let's talk about using the sequence the contact in the future sequence to go after these people.
So just just real quick I keep using this January example because people are pushing off, and I was an SDR.
I was in that same rat race that a lot of you are, I was trying to be a effective I, thankfully, I think, started relatively quickly, and so it made it easy for me to have that fourth week to.
spend some time doing the high value activity to got me to quarter faster and the Month after that.
This future follow things is a very common thing that the sd ours we're doing it outreach so January.
I was an SDR April 2017 is when I started January 2018 I walked into the month with 60 people who had told me to follow up in January I had them tagged.
They told me to follow up in January you better believe I was ready to go after them, I knew, and this is what I want you to just start moving out of the i'm just an SDR phase into.
I have my pipeline, I am CRM all of this little area, and I am an ability to call my number, and I know looking two months out, I know that January is going to be a massive month.
And that month is going to be something where I don't have to do as much cold outbound instead I can spend a lot of my time trying just to just convert these 60 gosh if I convert a third of those 60 it's going to be a massive month.
And so here's here's what i'm going to do these people told you to follow up.
And now it's your job to make them fulfill their promise so let's go back to that example that I showed you.
In this case, i'm doing this on my you know, a separate email I showed you an instance where this individual I know his name is Steven here because it's me.
said hey follow up in the future in that moment let's pretend that we've gone back to when this person sent this email let's say a couple months ago.
This is where these future follow up sequences get really interesting I could do something along the lines of like sounds great will do.
Okay i'll follow up in June or early June 2022 or whatever it makes it very easy.
By committee here use this follow up sequences we've talked about.
To add this contact in the future follow up sequence i'm going to show you the language in the email in a moment, but just it's it's not too crazy but, again, we talked about scheduling this stuff in the future i'm going to send that email in that response.
That sounds great I promise i'll do that, but then instantly two seconds after I send that email i'm going to make sure, excuse me, before I send an email i'm going to make sure that i'm scheduling out I want that sequence to start whenever they told me to follow up.
Minimum set that follow up so then later on.
I not only have this person tag to somebody that's going to be followed up in the in the future, but I also have a sequence that says something along lines of.
Something short and sweet and what am I trying to capitalize on trying to capitalize on what they said in thread already.

They said follow up in August, they said follow up in jail or whatever it is i'm sending an email sending this response to them when that time comes around say.
responding to them in thread using their own words against them say hey i've been waiting to send this for a while now you've mentioned now it'd be better let's talk about this moment.
How will this whatever.
And this is a really powerful way to make sure that not only are you starting to look in a future way at these people, but you're actually doing the activity right now in that moment to create that future pipeline.
So any questions on that are some of the kind of the thought process here.
Okay, for those of you who have sales engagement grab sales loft outreach group whatever hubspot sequences salesforce has something called high velocity sales cloud that.
i'm told isn't that great, but at least it has some sort of functionality of sequences like do you see yourself getting kind of power and from being able to do something like this.
Now, if you don't have sequences if you just absolutely don't have the ability to do that add tasks to this people or add these people to a spreadsheet.
That says here is the date that this person told me to follow for the month that this whole new follow up and build that list over time.
And every day, you know the last week of the pre of the month before that month.
start looking at those people and say I ought to be emailing these people, right now, let me write these emails put them in my draft folder or scheduled them to send starting.
You know, a couple days into the month, so I can start capitalizing on these people.
that's your hotlist as much as sequences are important it's more important to have a hot list of people that you know are likely to convert.
So for me in January 60 people I knew I could probably convert a third, a third of those at the very least, because I knew a lot of those were fake brush offs, but I was going to make sure that even if they're fake brush off, I was going to try to capitalize on as much as possible.
Okay let's move on.
yeah.
there's a question in the chat the sales loft kind of similar feature.
yeah so sales loft so that the concept of a follow up sequence where there's the reply like where i'm essentially attaching a reply thread to a.
To an email that i'm writing right now i'm not 100% confident, but they allow like the very first email step of a sequence, to be a reply.
But if that's the case, then you should just check it out see if you can like just you can test it relatively easy by creating a sequence.
having to be replied to thread, the first it doesn't give you that option, the first of all, you know that's not going to work, but if it does give you the option to reply thread.
Try attaching it in an email or sequence, to see if that works my hunch is that it may not have that specific functionality.
In which case the theory is still very similar which is respond to the email saying yep we'll follow up.
You know, in three months, and then I would add tasks on that instead just go add tasks saying in three months go put this person in the sequence that said hey you know you mentioned, I should follow up.

If not, if that again I think it's more important to have a less efficient process if you can't use a sequence to do this, but to capture their information in thread.
If they actually wrote something down.
If they didn't write something down and maybe they set it on the phone then it's a relatively easy thing to take one of your sequences have that first email be someone say something along the lines of hey you mentioned, I should follow up now.
You know, three months ago we chatted let's follow up now, when works best for you and I would just essentially write down that phone conversation use my sequence do that use the.
First, email on that sequence to.
call attention to the call.
That you had with them so sorry that I can't I don't know that all these these sales engagement providers look very similar, but they do have some nuances, but I think it's more important here is less about the sequence and more about the process.
Okay, so all right, this again this is right here, we talked about week one if you keep a consistent amount of people in sequence and keep a consistent sequence reply rate.
Then I can predict about how many people are going to respond, and I can book meetings with every month.
Now this right here is taking it a step further and saying.
that's my cold outbound sequence pipeline now i'm going to look at this far warm or sequence pipeline i've picked up the conversations of contacts in the futures of my contact my referrals.
And this is where I get a lot more bang for my buck, and this is where I start exceeding my number by you know, by a large extent.
So I want you to start just I hear on the phone calls phone all the time, people say oh i'm just an SDR you know somehow like belittling their experience as an SDR it's far more like.
that's you should think of yourself, much more than that, because you really are managing and pipeline, like me, or like a CRM who is looking in.
A CRM is entire responsibility, yes, this is set up the process so that you and all the sales people can be.
You know, effective, but at the end of the day, what's the CRM job it's to hit a massive quarter general a.
really big quota and not just to hit it but, to be able to tell the board tell their CEO whatever how close, am I going to get to this number, they have to have a predictable pipeline, and this is where you can start really acting like that person.
Okay, so reflecting on what I just presented if you maintain the right number of people in sequence you'll always get a healthy amount of people responding.
Some of these meetings are going to push out in the future we just talked about how to capitalize on those but the best sd ours capitalize on meetings right now Raymond brought it up or someone brought it up and said.
Oh, what do you do when someone says send me more information, like.
don't get comfortable with taking that as an objection and saying oh sweet i've got an easy template and sequence that I can put people on.
there's lots that you should be doing right now to be able to capitalize and overcome that objection that's your job as a salesperson is to drive that urgency.

So i've got a little quiz question for everybody here, what is the first thing to do when you receive an email response virtually any any time here's an example.
come up for you to throw in the chat what's, the first thing you do.
Okay sweet we've this is good okay awesome I won't.
Make it take a long time sure yeah you definitely won't respond the email, but the very first thing that i'm doing here, and this is kind of a two part answer so it's maybe a little confusing is.
The first thing I see that guy put his cell phone in his email that's in his email signature so i'm going to call that person constantly.
Okay, this is instead of sitting here a lot of you probably get these responses every day you get 510 20 negative responses or objection responses, a day instead you're sitting you're saying.
You know Okay, I need to come up with the perfect response and i'm sure i've gotten a template that's made it a little bit easier, but I need to I need to personalize this.
Instead, what I want all of you to do is instantly look at this and say, before I agonize over my email, because I know that takes a long time, let me call them.
i've got a perfect chance to call them and why is this so important because.
Two things one is if they're emailing you right now, they just emailed you hopefully you're right, you know it's at their fingertips, they likely have a second.
They may not be in a meeting where they're presenting or something they might be sitting at their desk they just responded to you.
They will be so caught off guard if you call them right now to talk to them and again take a conversational tone, this is a huge opportunity to book a meeting okay i'll get i'll get.
Your hand up i'll get to you in one second This is like, can you imagine the surprise, because nobody does this.
If somebody responds to you and said not interested, or bad timing, or whatever, if you call it instantly and said hey john I just got your email, you said you were an inch, why is that I.
I thought you had some sort of trial going on right now i'm confused as to why this wouldn't be useful right now.
But there's so taken aback generally it's not.
Often, maybe you think it's such a nerve racking thing to make these calls sometimes maybe your first time she's other going to be angry or pissed at me because I just told me i'm not interested.
Instead, again go back to that tone of your cold call the tone of your language hey john you said bad Tommy I didn't adjust I thought you guys just.
said this X amount of thing happened in the news I thought that just happened like this is the perfect time we should be chatting i'm sorry if I was confusing in my emails.
That you can you can take an apologetic whatever it is that makes you feel genuine, this is an amazing opportunity to catch someone you've got their phone number, they just.
responded to you, your top of mind, they know who you are, and now you have an opportunity opportunity to humanize yourself in overcoming objections okay what's your what's your question.
Alright, so I have i've been having a very related question about this so well your sales engagement tells you they've been clicking like three, four or five times will become mark as a hot lead right.

Is it like is it appropriate to just like call them right away, we see that happening or is it like cuz I just need some help like me in the room here and says like what is the creep factor, because I think that's happened to me before, when I was like a technical worker.
I got an email bunch of times for just for whatever because i'm bored and then you know they call me immediately i'm like this is this does not make me feel comfortable.
haha yeah I think it's I think a lot of that goes back to your tone like what i'm not saying is calling and say hey I saw you just clicked on my email like.
Saying.
But I do think it's very worthwhile to contact hey kyle just you know I just uh.
I sent you an email in the last couple days, hoping you read it, but if you didn't here's my thought and obviously you internally like I know exactly who they're calling like I know because I just read the email.
Like I think it's a very fair thing for you to capitalize on when you some see some sort of activity to go for that instantly to try to capitalize on it, and a lot of you, by the way.
In your different platforms.
Like CRM have a lot of this as well, there is some sort of like activity feed and you could see people just clicked on this, so they just did something and sales loft has this group has this outreach has this.
In every case, this exists and so it's an easy opportunity for you to go and try to capitalize on something happening in that moment okay responses clicks emails whatever.
Alright, so I don't want to people put a bunch of stuff in the in the chat you're exactly right it's like.
We want to call them if we can and if if they don't answer like that was more of a hail Mary but it's a pretty it's a pretty effective hail Mary if that doesn't work.
Absolutely, then it's time to make sure that this information is in your CRM so that you can call them in the in the future you've got.
That that cell phone number that's super important some sales engagement platforms do that automatically for you, they just take the number and they put it into your system.
Then replying This is where like objection handling is getting those objection handling courses, you can take we're not doing a cold call course we're not doing an email course what we're doing is we're talking about how to use sales engagement or.
Things like that to make objection handling easier and so let's talk again if i'm getting a lot of emails email responses with some sort of objection.
there's no reason for me to agonize every single time over what do I do with that objection you're getting some of the same objections all the time.
there's no reason for you to agonize does this, by the way this I wrote this I imagine that this is 90% of your objections by these right here.
i'm not interested straight just i'm not interested, or you know not not a priority, whatever it is.
bad timing and I put valid or invalid sometimes it's bad timing and it's a push off or, in some cases it's very valid reason, not the right person.
can sometimes that's a fake push off for some times it's real no budget or competitor.
Every one of you, if you scrape like screenshot this or do something if there's one like thing you can actually do very easily today it's a very easy when you can do in the next hour go make sure you have some sort of template that's written for each one of these.

And if you have sales engagement put it in there very easy to go in and.
here's your template button we're gonna have this can be a 10 second DEMO.
click data template I can create a new one, or I can take a blueprint of something else but dad I wrote a template.
That simple in the future, it makes it easy for me to respond to these, and to do so quickly and then as we've talked about put a sequence on put a follow up sequence says, you said it was bad timing.
I don't think it is, but, for whatever reason you're going to respond and say, actually, this is the perfect time to talk, you know based off of your objection.
They don't just leave that an email I don't have that go out into the ether and forget it, but a task on it or put a sequence on it so you're following up Okay, you have another question.
If not interested, is a non negative response, then what is, I want to talk to your manager or something.
That is definitely.
I would say it's a so not interested, is definitely like.
It might be putting it more as a negative response but not interested, to me, is still a like, why not.
So not interested, is certainly out of these five you know, or at least seven since we've got some that are either or either these seven not interested, is certainly the one that you're least likely to get a response back on yet it's also the one you often agonize the most.
Responding to if that's something that you do, because you don't know what to say to it, so this is why it.
First of all, important to make a call because you don't agonize and it's that's the best chance you have of overcoming this.
But then second of all have some sort of objection handling template that says.
hey you know i'm sorry that you're not interested, for this reason I would have thought that you're interested For these reasons, is this not a priority, these not important to you.
Now, is there a high likelihood that they respond now, but the purpose is doing this very quickly.
yeah like Steve just said Steve you put this as a direct message on accident to me, but you it says Steve put in the chat they took the time to respond, even with the response not interested, they could have just ignored you and so like.
Those people because they said that either they're just like sick of getting your.
automated emails or they're just trying to not your time or, in some cases there are actually trying to save you some time and they're saying i'm not interested, that you know don't bother with me anymore way in which case many times.
If you call them, they may actually be willing to tell you why and then that's an opportunity to overcome an objection so.
By the way, this is something that already exists and outreach today so again in many cases i've tried to sell outreach I don't i'm clearly biased because I came from their.
outreach is putting a little bit more time, instead of just understanding reply rates.
But in trying to understand what is the sentiment of emails and and even being able to click and automatically classify your objections, like the most common objections you receive now, why is that important again so that you can create templates for so.
This is duplicative over what we talked about last week.

Where we talked a little bit about phone calls and Canada, the the upfront contract, which to me, was a very important part of.
My success and I think a lot of people's successes in cold calling is being very clear upfront as to why you're calling asking for a meeting very quickly now what will you said last time is if I asked for a meeting upfront after you've opened and kind of shared who you are.
Asking for a meeting very early on, is a very, very, very fast way to find out what standing between that person and a meeting.
Only a crazy person says yes instantly.
it's over you know over the top, like if someone if you call call call someone you ask them for a meeting and they say yes instantly.
You should almost be doubting if that meeting holds because it's so weird oh that's odd like, why are they, why did they just accept my meeting instead.
Your purpose in asking for meeting very quickly is to suss out what is it that would hold them back from meeting so, then you can overcome that objection.
it's kind of the code to quick tips at the end of this and, like towards the end of this.
discussion today a big part of the discussion today has been more focused on building your future funnel and capitalizing on people in the future.
On the back end of this, what are the things you can do right now to capitalize and one is having an email objection templates that you can use after of course you've called somebody.
And then on the flip side.
categorizing and understanding what are my top objections that I struggle with on the phone and practicing those constantly because your entire purpose of your of your cold call should be to.
get those objections out as quickly as possible and and figure out the best way to respond to them.
Okay.
For those of you who are using sales engagement we're using any sort of dialer if you're familiar with like ring central or dial pad or error call or.
Those of you with CRM probably have some certain dialer that you're clicking out of maybe you're using your cell phone that's a bummer.
But that happens, but my generally, what happens is if you're using any sort of dialing system.
You have some form of a call disposition if you've made a call and you say this is what happened on that call, even if you're just putting it in your notes on what happened on the call.
You should be consistent with what is happening, are you getting a cold call and hanging up on you immediately, are you getting a lot of referrals are you getting a lot of.
You know, send me more information, those are all objections, you want to understand, so that then you can start practicing that specific objection to capitalize more in future.
So okay i'm going to skip to the homework.
right here, and then I want to leave the next nine minutes for kind of last questions, let me jump out of this real quick the homework, I know all the homework has been really a.
more of a suggestion, but I do think it's important to think through, and to do if you can the homework that i'm going to sign today, and you can combine this with all the other homework here.

Is I would encourage you to create email templates for your responses, so that you're not taking time on them, and you can test them and see how those templates are working.
i'd also encourage the same thing to do with objections that you can look at on a screen or on a note card that you get on the phone a lot, so that you can read the exact kind of practice way that you should respond to those.
And then some other ideas for things you can kind of do in the background, I put as extra credit here.
build a follow up sequence identify a hot list of your most engaged prospects or go in and use these features like tagging to try to identify who are people that are likely to convert with me in the future that's what kind of the the.
The gist of what this entire three week purpose has been so far has been to help you take a longer view of your time as an SDR so that you can start figuring out what is it that I need to do now.
That will help me be more and more successful and my kind of compounding fashion for the future.
So, thank you very much for being part of the class, this is the end of the actual content itself.
I do believe that there is some form of a final exam at the end of this.
And that's really simple and easy actually I should say, one of the pieces that I have not covered that will be covered on the final exam so i'll give you the just the the piece of this is that one of the most common questions I get.
And I promise i'll stop for questions is how many people Should I be sequencing are going after an individual individual account at any given point in time.
The answer, of course, is always in it depends, but we should be careful carefully considering how to go after these accounts there's no reason as sd ours to fall into the trap of spamming people.
We should never put more than five people in an account.
into a sequence in any given point in time, and I see this quite often, especially with the ease and often Sam and the other is.
I see he is trying to do, cold outbound they don't have a lot of time in their day to focus on prospecting so Paul list of.
You know, however, many people, they can they don't look at who those people are their titles as much they don't want to be cast they dump them all into a sequence or they send them on mass emails.
That starts looking like behavior that just is a spammy and your email can be blacklisted like their actual real risks to that, but also it's not like you're not taking more of an account based high penetration view into.
Your job as an SDR and so generally my general rule for going after any sort of counters to have somewhere between two and five people in sequence in any given point in time.
And if you've done the research, you have all the available sequences you can have different persona sequences you can have specialized sequences all these things will allow you to be more targeted with each individual in the account so okay i'll promise i'll stop now any questions.
Before we break it could be random if they have nothing to do with this content just other random sales development questions.

i've got a question around most effective ways to coach sd ours that you're working with from a partnership perspective.
So imagining This is very much in your view, do you have SDR support you in your accounts.
Yes.
there's a couple things you.
You won't have as much time to do cold outbound on those accounts as they do if you share those accounts are you sharing the accounts for the most part.
yeah i've got a name list and i've got an amount that I can upsell into who we go off to together str myself because that's a little warm and then there's a cold net new business list.
as well.
Okay, this and i'll ask you this, both from your perspective and for all the sd ours on the call here how do I partner with an a D.
there's a lot of different ways, you can do this, one of them us like the easiest answers that Sam I can give like without digging into your specific situation is that generally having some sort of title that you own or like some sort of.
Title VP and above or something and the others are down below.
Like where you manage maybe the cios you talked about how you can spend the 2030 minutes pinging the CIO and making sure they're aware of what's going on and.
Meetings you're having or just doing any sort of cold outbound to that person, and then the SDR is handle that much larger pool of more junior people.
there's there's different ways to handle that but that's an easy way of just essentially drawing a line and saying.
me as an eight he will handle this sd ours will handle these titles and the seniority so to one simple way The other thing I talked about as a lot of what we've went over in week one is there's str should be taking a more manual approach.
Because they have more time to focus on these individuals and so more manual emails more cold calls more linkedin.
That scale or something that the SDR should focus on for you, I think it's more saying either a.
I can just send a relatively simple short and easy automated email to certain types of people but i'm just going to spend a little bit less time.
Or if i'm going for the more senior folks you're going to do it in a lot less scale and you're going to be very targeted with those but maybe you're not doing things like cold calling or linkedin and it just depends on your style.
The only other thing i'd say, is it just to the extent that you and the SDR together can make it seem like SDR is often come off as very junior.
Just by the nature of the title itself.
str is often can prospect, but like CC you want, you know ccu in on an email and say hey here's Sam he's actually your point of contact he'd love to connect on this.
can actually feel a little bit more like i'm bringing in you know, not an executive like i'm bringing in someone that's a little bit more senior that deserves a response that can be a good play.
Every conversation about that, but yeah other questions.
Thank you.
Now.

Do you, I have a question about cold emailing and like sequences do you ask for a meeting and you're was that in this class where you're talking about not asking for a meeting in the first couple of emails.
No, I think it must spend a different class I think people have very different opinions on this.
yeah and I generally do feel like.
That your call to action like you should have a very short and sweet call to action, and it should be.
The thing I hate, more than anything, in a call to action is an extremely weak ask and what I mean by that is something along the lines of hey let me know if you're interested.
hey please you know Ping me i'm here so Ping me if you, you know if you have any questions.
there's no asked to that what that generally means is that email is not asking for any sort of response so very often it's a quick just delete or like oh yeah i'll put the summer, for the future.
I generally feel like and you can test different messages and see how your marketing your persona response to it.
I generally am a more on the proponents of having a very clear ask that's easy to say yes or no to, and so you could take it as very direct like do you have time this Thursday at three.
Or you could say something along the lines of where, if you want to be softer on this that says hey are you open to learning more I think there's different ways to do it, but I want to be able to make it easy for them to respond, yes or no, and not just delete my know.
So.
one more minute anything else Emily you're welcome to come off mute and make an enhancement any announcements in YouTube.
Alright Thank you so much Steven your demos your info was great.
Thanks also to our Members, we appreciate y'all being in this class also you should be receiving emails and or slack from Jordan coming soon with more info on the close out to this class so again, thank you so much.
really enjoyed this today being my first time so thanks again Stephen and we will see you guys later.
Thanks.