The Proactive Prospecting Playbook
for HubSpot Sales Partners
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How to Use This Playbook

What is Proactive Prospecting? Proactive Prospecting simply describes the process of reaching out to good fit companies, having a good reason for outreach, and offering something of value in order to establish a connection and ultimately schedule an Exploratory Call.

This playbook is meant to assist you in developing your own Proactive Prospecting email and voicemail sequence. It offers a format for effective Proactive Prospecting emails and voicemails and examples of each.

Email/Voicemail Format

In general, a Proactive Prospecting attempt (email or voicemail) follows the following 4 step format. In the next section, there are many examples which you can review.

1. Target good fit prospects

Perhaps the most important part of Proactive Prospecting is identifying good fit target accounts.

Not sure where to start? Watch this training for some basic parameters we have found are good to use.

NOTE: Before you start reaching out, be sure to register the lead -- this needs to be completed so we can pay you commission.

You'll customize your attempts to your prospect's business. See the email/voicemail examples for examples.

2. Have a good reason for outreach

Have a good reason for contacting your prospect. Focus on "why you and why now?"* For instance, you might contact them because:

- you noticed something like a press mention or a recent blog article they published,
- they've recently had an event that is likely to trigger a sales opportunity, such as a new product announcement or a sales job posting. Learn more about trigger events at 30 Types of Sales Trigger Events and How to Track Them, or
- they converted on your website, for instance downloading an ebook or registering for a webinar.

*Why you and why now - from Jeffrey Hoffman

3. Add value to the conversation

Besides having a reason for reaching out, add value when you contact your prospect. Examples include:

- share a piece of highly relevant content,
- share a tip based on observation of their site or business
    - A good strategy can be to fill out a sales form on their website, and see how long it takes for someone to follow up with you, as well as how they follow up with you
    - Look for areas you can critique in a friendly way, some common pitfalls are:
        - Speed of response
        - The number of times the salesperson follows up
        - The messaging they use -- do they come off as an expert?

4. Offer a compelling call to action

Finally, end your attempt by making a logical transition from your reason for reaching out to a very simple call to action. An example might be "Is increasing sales performance a priority right now?" Although the question is a simple yes or no question, often times when prospects do respond, they do so with a more lengthy answer.

Guidelines for Success

To be successful with Proactive Prospecting, follow the guidelines for success below.

1. Customize Your Attempts

Use customized emails that are relevant to your prospect's business. Know the persona and the company profile you are targeting and craft your messages to resonate.

2. ...But Do So at Scale as Much as Possible

While your messaging should be tailored for each target account, you don't have to completely rewrite each email for each prospect. Because your messaging targets a certain persona and company profile, there are likely to be common elements that resonate across prospects.

It is a good idea to use a template manager that tracks which email templates perform the best. (such as HubSpot Sales Professional)

3. Use a Prospecting Sequence

Research shows that it takes 8-12 touches to reach a decision-maker by phone, even when they are interested in your products or solutions*. Your success at prospecting depends as much on your follow up and diligence as the relevance of your messaging. So make sure to use a sequence of attempts for each prospect.

Also, track and manage all your prospects and attempts via a CRM, such as the free HubSpot CRM.

*Source

4. Nurture Your Prospects

Not every prospect you reach out to will be ready to buy right away. Although you may stop your immediate prospecting attempts at 8-12 touches, keep a list going of potential good fit, but not hot, prospects in your CRM. Reach back out to them on occasion using the same principles as outlined in the rest of this playbook.

Also, encourage these prospects to subscribe to your blog or convert elsewhere on your site so they will become an opted-in contact and can be nurtured by your marketing emails.

5. Monitor Engagement and Prioritize Accordingly

Focus your best efforts on your most engaged prospects. For instance, if a prospect is opening your emails and clicking on the email links (either to helpful content or to your company website), prioritize the prospect accordingly. Even if they haven't responded directly yet, their actions indicate they are engaged.

Use an email intelligence tool like <u>HubSpot Sales</u> to monitor this information.

6. Just Do It

The best way to improve your prospecting sequence is not to sit in a lab for two weeks creating 25 of the most perfect emails ever created. The best way is to:

1. Put together a list of target accounts based on a persona and company profile you select
2. Start creating and sending emails and voicemails that will be relevant and helpful,
3. Start turning those emails/voicemails into templates you can further customize for other prospects, and
4. Start tracking your efforts via a CRM and email intelligence tool

In short, don't wait. Find prospects and start prospecting today!

Email/Voicemail Examples

Below are example emails and voicemails from which you can borrow.

Example 1 - Trigger Event and Adding Value with Content

Subject: Acme Software & Sales Positions

Hi John,

I recently got an alert that Acme Software is hiring for new business development representatives. Congratulations on expanding the business.

Since you are hiring, you would probably find this article by renowned venture capitalist Tom Tunguz interesting. Mr. Tunguz writes insightfully about the SaaS industry, including on the subject of sales hiring. http://tomtunguz.com/sales-hiring-strategies

One of the things Mr. Tunguz mentions is how an effective lead generation strategy helps new reps be successful. On the topic, I've done some research on your company. We work with firms that are looking to improve their sales productivity and close rate- and I have some tailored suggestions you might find interesting. Would this be of interest to you? Is there a good time to connect?

David Smith
The Smith Consulting Firm
Helping Growth Business Grow Bigger, Faster

Comments: Since this is the first example, let's review how it follows the Proactive Prospecting Email/Voicemail Format.

1. Target good fit prospects - this email is targeted - in this case to a senior executives in the SaaS industry

2. Have a good reason for outreach - the email alludes to a likely to be meaningful trigger event - the company is hiring sales people

3. Add value to the conversation - the email includes helpful and likely to be relevant information - the Tom Tungoz link and our comments about it

4. Offer a compelling call to action - the email transitions from the helpful link into lead generation and asks if it's a timely topic of conversation.

Finally, note that the email signature has a clickable link where the prospect can learn more. Because the email format focuses on the prospect, not the agency, it can often make a prospect curious. Make sure to include a link somewhere in the signature, whether a tag-line, LinkedIn profile, or company URL, that will encourage a curious prospect to click and learn more. Of course monitor which prospects are clicking (via HubSpot Sales or another tool).

Example 2 - Corresponding Voicemail

Voice Mail:

Hi John, This is David Smith from The Smith Agency. I got an alert that Acme Software is hiring for new business development representatives. Congrats on growing and expanding the business. I was calling to see if you are interested in reviewing sales hiring strategies used at different SaaS companies? If so, I'm going to email you an article from venture capitalist Tom Tunguz covering the topic. I've also taken a quick look at your site and see opportunities to drive more leads for your new sales reps. Is there a good time to connect? You can reply to my email or feel free to call me direct at 555-xxx-xxxx.

Comments: This voicemail corresponds with the email directly above it. The voicemail should essentially mirror the email with a couple of slight modifications.

Example 3 - Tip on a Blog

Subject: A quick suggestion for your website

Hi John,

I'm reaching out out after seeing your blog post "The 7 Mistakes High Tech Manufacturer's Make." I thought it was a good post - targeted and especially action oriented, so I shared it with my network.

However, I noticed there were a couple of gaps that were preventing you from fully capitalizing on the post from a sales perspective.

I have a few other ideas I can share. Is sales acceleration a timely topic?

Comments: As in our first example and the other examples in this section, this attempt follows the standard Proactive Prospecting Email/Voicemail Format.

Also, notice that the email couples a compliment with a tip. Don't just give tips, find something to compliment too.

Example 4 - Sales Process Critique & Tip

Subject: An observation about your sales process

Hi John,

Congrats on your recent coverage in Techcrunch and the impressive growth over the last year.

I noticed that when you go to fill out your website contact form, it took your sales team over ___ hours to follow up with me. <u>MIT found that your odds of connecting with leads goes down considerably if your team waits even five minutes</u>.

I have a few more ideas I can offer. Would you like to discuss my report in more detail?

Example 5 - Competitors Report & Tip

Subject: Acme Versus Competitors

Hi John,

Congrats on your recent coverage in TechCrunch and the impressive growth over the last year.

I noticed some of your competitors, such as ___ and ___ appear to growing their sales teams faster than you according to LinkedIn.

I have some ideas on how you might be able to compete, and effectively outpace them in the long run.

Is there a good time to connect this week or next?

Example 6 - Share Relevant Content (From a Third Party Site)

Subject: Acme Product Award

Hi John,

Congratulations on the round of funding mentioned in Techcrunch this week. Acme has had some impressive business growth over the last 6 months.

Are you looking to get a better handle on your economics as SaaS company as you grow? If so, you'll probably enjoy this blog post by renowned venture capitalist David Skok.

http://www.forentrepreneurs.com/saas-economics-1/

One of the things David mentions is that new customer acquisition is a key driver of SaaS business success. We've noticed growing SaaS companies often struggle with sustaining new customer acquisition in part because they struggle to maintain consistent lead flow and sales follow up.

Based on working with other clients in your industry, I have some tips I would like to share with you.

Is this a timely conversation to have?

Example 7 - Responding to an Inbound Lead

Subject: Acme Software & SaaS Marketing for CEO's
Hi John,

I got a note from Marketing that you came to our website recently and downloaded our guide <u>SaaS Sales for CEO's: How to Get to the Top of the Market and Stay There.</u> Thanks for doing so.

If you are interested in the topic, you might also like this accompanying blog article: <u>SaaS Sales Trends and Challenges for 2015</u>.

I find that companies like yours who download these guides benefit from doing a more customized audit of their process.

Is this a timely conversation to have?

Comments: This is a message geared for an Inbound lead.. Messages to Inbound leads can generally be shorter, because the prospect has already shown they are interested in the subject matter.

Even though the message is shorter, it still follows the Proactive Prospecting Format - 1. It is targeted - in this case to someone who downloaded content 2. We offer a reason for the outreach, which is the download 3.We've added value to the conversation by suggesting another related piece of content and 4. We extend a simple call to action by asking if it's timely to have a further discussion.

When responding to an Inbound lead, use an attempt like this first and then refer to other examples for ways to continue your prospecting sequence.

Example 8 - Corresponding Voicemail

Voicemail:

Hi John, I got a note from marketing that you downloaded our SaaS Sales for CEO's. Thanks for doing so. Given your interest in the topic, you might like this other article too - SaaS Sales Trends and Challenges for 2015. I'm going to forward that along in an email.

It would be great to hop on a quick call to discuss your process in more depth, and see if there are any quick fixes we could make that would help drive more sales for you.

Is there a good time to connect? Reply directly to my email or if you prefer, my direct phone is 555-xxx-xxxx.

Comments: This voicemail corresponds to the email just above it. The voicemail should essentially mirror the email with a couple of slight modifications, which this does.

Example 9 - Responding to an Inbound Lead - Alternate

Subject: Acme Software & SaaS Marketing for CEOs

Hi John,

Did SaaS Sales for CEOs download okay for you? .

David Smith
Smith Agency
Helping growth companies grow faster, better

Comments: This email is short and sweet. Often it is the short and sweet emails that get a reply. Hat/tip to Carole Mahoney and Rick Roberge. More information on this approach here.

Putting it All Together Into A Prospecting Sequence

Research shows it takes 8-12 touches to reach a decision-maker by phone, even when they are interested in your products or solutions*. Your success at prospecting depends as much on your follow up and diligence as the relevance of your messaging. So make sure to use a sequence of attempts for each prospect.

Below is a sample prospecting sequence to which you can refer for guidance. It includes 11 touches counting each email and voicemail as a separate touch. For a really good lead, extend the sequence by making even more attempts, especially before starting the break-up (the break-up starts in Attempt 5 in the sequence below.)

One more thing, do NOT skip the phone calls and just send the emails. You need to do both to connect.

*[Source](#)

Attempt 1 - Be Helpful, First Attempt to Connect

Day 1 - Phone - Attempt to connect. If connect, ask high level questions to qualify and set up a follow up meeting. If not, leave a voicemail based on the email you'll send.
Day 1 - Email - Send an email.
Example email: Trigger Event and Adding Value with Content

Attempt 2 - Did You Get My Email?

Day 3 - Phone - Attempt to connect. If connect, ask high level questions to qualify and set up a follow up meeting.
Day 3 - Email (reply to previous email so there is a thread). See example below.

> Example email:
> *Subject*: Re: Acme Software & Sales Positions
>
> Hi John,
>
> Did you get my email (below)? Was it helpful?
>
> Is there someone else at your firm besides you that you recommend I share this with?

Comments: It's often the short and sweet emails that get a reply. By sending out the previous helpful email, you've earned the right to send this one. Asking for an internal referral as this one does can be helpful.

Attempt 3 - Continue to Be Helpful and Attempt to Connect

Day 6 - Phone - Attempt to connect. If connect, ask high level questions to qualify and set up a follow up meeting. If not, leave a voicemail based on the email you'll send (below).
Day 6 - Email (reply to email in Attempt 1 so there is a thread)

Example Email:
Modify the opening to reflect that you are following up on a thread - i.e. starting the email like "Following up on my last email (below), congrats again on the business growth. Are you planning to grow traffic and sales even more…"

Attempt 4 - Continue to Be Helpful and Attempt to Connect

Day 10 - Phone - Attempt to connect. If connect, ask high level questions to qualify and set up a follow up meeting. If not, leave a voicemail based on the email you'll send (below).
Day 10 - Email (reply to email in Attempt 3 so there is a thread)
Example email:
Tip on a Blog, but modify the opening to reflect that you are following up on a thread - i.e. starting the email "Hi John, I've sent over a few emails recently (below). Are you interested in additional advice that might help you drive more sales? If so, I've found that working with companies like yours…"

Attempt 5 - Am I Being Helpful?

Day 13 - Phone - Attempt to connect. If connect, ask high level questions to qualify and set up a follow up meeting. If not, leave a voicemail based on the email you'll send (below).
Day 13 - Email (reply to email in Attempt 4 so there is a thread)

Example email:
Subject: Am I being helpful or should I focus on other accounts?

Hi John,

I've sent over a few resources and ideas in the last few weeks (thread below).

Am I being helpful...or would you recommend I spend my time focusing on others? If there is someone else at your firm besides you who I should reach out to, let me know.

Comments: If you haven't gotten a response from your prospect yet, this touch makes it easy for them to respond with a polite 'not interested' or they can let you know that they are. If your prospect is a really good one, you can push this touch out further and send more helpful touches (similar to 1, 3, and 4 above) first.

Attempt 6 - The (Polite) Break Up

Day 16 - Phone - Attempt to connect. If connect, ask high level questions to qualify and set up a follow up meeting. If not, leave a voicemail based on the email you'll send (below).
Day 16 - Email (reply to email in Attempt 5 so there is a thread) to let the prospect know you are moving on.

Example Email:
Subject: Other Accounts

Hi John,
I didn't hear back on my email below. Given that, I'll go ahead and focus on others.

Did you find the information I shared helpful? If so, check out our blog, where you'll find other great content relevant to a growing SaaS company.

If I've sent this in error and you'd like to connect - or if there is another person besides yourself at Acme with whom I should be speaking - please reply. Otherwise, good luck with continued growth.

Best,
David

Comments: This is the break-up email/voicemail…. done politely. It let's the prospect know you are moving on and gives them a final chance to reply. This touch solicits among the highest response rates of any touches in the sequence. You shouldn't send this email/voicemail unless

you are willing to walk away from the prospect (in the short term that is - you can always come back later).