



Proactive Prospecting

Stand Out and Connect with Prospects



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The Successful Selling for Agencies series

1. Successful Agency Selling Introduction - On Demand

Position Your Agency For Growth

2. Running a Top Notch Exploratory Call - Part 1 - On Demand

The Exploratory Call Discussion Guide

3. Running a Top Notch Exploratory Call - Part 2

How to Excite and Qualify Your Prospects

Today's Session!

4. Live Lab: Agency Grader - Jan 12

How to Use the Agency Grader to Improve Your Agency

5. Proactive Prospecting - Jan 19

Stand Out and Connect with Prospects

6. Live Lab: The Connect Call - Jan 26

Open the Sales Conversation and Book the First Meeting



1 Why Proactive Prospecting?

Reminder from last session

We are NOT looking to be just a 'vendor' to clients



The **competition** has gotten fierce

Clients are jumping from agency to agency



and clients are **slicing apart** agency offerings



Reminder from Last Session

We are looking to be a 'growth partner'

✓ Summary

*Stop pitching.
Aim to Help.*



✓ Summary

*Sharpen
your
Unique
Selling
Proposition*



✓ Summary

*Structure
Your Sales
Process*



Doing better in the sales process all starts
with finding good clients!

*Good prospecting -> good opportunities ->
good clients -> good relationships*

But it's not easy



Let's review an actual
agency prospecting email

What Do You Think?

----- Forwarded message -----

From:

Date: Thu, May 7, 2015 at 7:01 AM

Subject: www.hubspot.com

To: amoorthy@hubspot.com

Hi, my name is Jason, and I'm emailing you from an Online Advertising Agency that specializes in SEO (Google Rankings), Display and PPC Advertising, and creating Custom Designed Websites.

Our services are legitimate and high quality. We've helped hundreds of companies improve their SEO rankings and advertising traffic, resulting in thousands of increased rankings and hyper local page views.

Our team customizes our packages to your specific needs. Please get back in touch with us if you'd like to find out more about how we can help you get higher rankings and more customers.

Looking forward to hearing from you.

Thanks,
Jason

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Looking forward to hearing from you.

Thanks,
Jason

*Is it
interesting?*



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Thanks,
Jason

***Is it
believable?***



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Looking forward to hearing from you.

Thanks,
Jason

***Is it
compelling?***



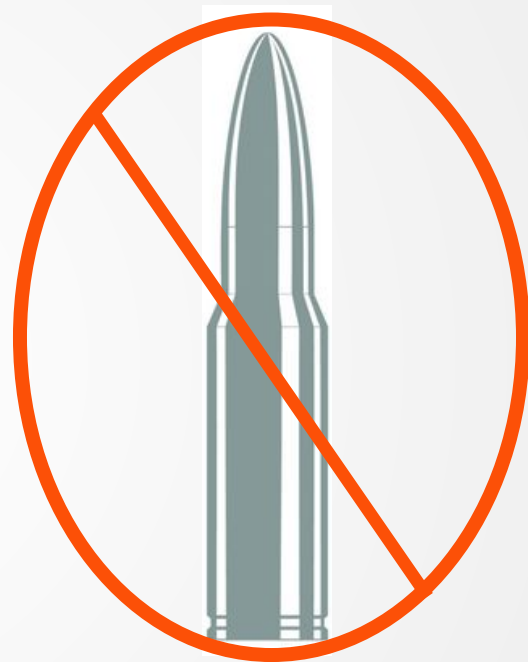
One of the **Most Common Questions** From Agencies...

Can you share a prospecting script that actually works?



Unfortunately, there is **no silver bullet.**

And if there was, everyone would already be using it



*Can you share a prospecting
~~script~~ that actually works?*

approach

Yes!

Agenda

1 Why Proactive Prospecting?

We've just done this section!

2 What is Proactive Prospecting

3 Your Proactive Prospecting plan

4 3 Quick Tips for Success

5 Review and a final thought

2 What is Proactive Prospecting

What is Proactive Prospecting?

*Reaching out to **good fit prospects**, with a **good reason** for doing so and **providing value** in order to **connect and schedule a 1st appointment**.*

What is Proactive Prospecting?

Here is another way of showing it



Let's break it down using a fictitious agency...

The Smith Agency

- Medium sized agency
- Offers full range of digital services

Proactive Prospecting



Smith Agency's Ideal Client Profile

Smith Agency Ideal Client Profile**

Target Market

- Software as a Service companies (SaaS)

Target Persona

- Senior Executive - Chief Revenue Officer

Size

- \$5M+ Rev/year
- \$1K+ month in media spend

**Your criteria may vary



Proactive Prospecting



How *good of a reason* is this for reaching out?

New Message

Templates ▾ | Clear Template | ☐ Log in CRM | ⚙

Hi John,
I'm with full-service marketing firm specializing in pay per click,
online advertising, and website creative services...

Not very
prospect
focused is
it?

How about *this*?

New Message

Templates ▾ | Clear Template | ☐ Log in CRM | ⚙

Hi John,

We often hear from industrial software firms frustrated that they have invested in the website but are not getting an adequate number of new leads and customers in return.

Much
better.

But we can
be even
more
prospect
focused.

Find a Reason That Relates to Your Prospect's World

- Trigger events – e.g.
 - Sales hiring
 - Product release
 - Funding round
- Publicly reference-able information
 - Press mention
 - Prospect blog and social media
 - Prospect website

For more info on trigger events see [30 Types of Sales Trigger Events and How to Track Them](#)

Example Trigger Event

Acme

Entry Level Sales - Software Sales – easy apply

☆☆☆☆

3 Reviews –

, be involved and most importantly, HAVE FUN doing it. **Software Sales** Acc
you have... looking for Entry Level **Software Sales** Account Executives to a
marketing efforts... Convergepoint

[Overview](#) | [Reviews](#)

Looks like Acme, one of Smith Agency's prospects is **hiring sales people!**

Here is a very **prospect focused reason** to reach out

New Message

Templates ▾ | Clear Template | ☐ Log in CRM | ⚙

Hi John,

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

Proactive Prospecting



How a typical prospecting email attempts to add value



“Hey, let’s get together...

- For a no-cost website consultation
- To discuss ideas to drive more local traffic
- To review some suggestions to help you improve your website”

These are fine offers to make, but only add value in the future, not the present



Example - Smith Agency *providing value via content*

New Message

Templates +

Clear Template

☐ Log in CRM



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>

Proactive Prospecting



Example - Transition and Call-to-Action

New Message

Templates + Clear Template ☐ Log in CRM 

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 drive more qualified traffic and leads - and I have some tailored suggestions and industry insight you might find interesting.

Would this be of interest to you? Is there a good time to connect?

A Call-to-Action

Checklist

- Transitions naturally from the previous section
- Is interesting
- Is clear and direct



Summary



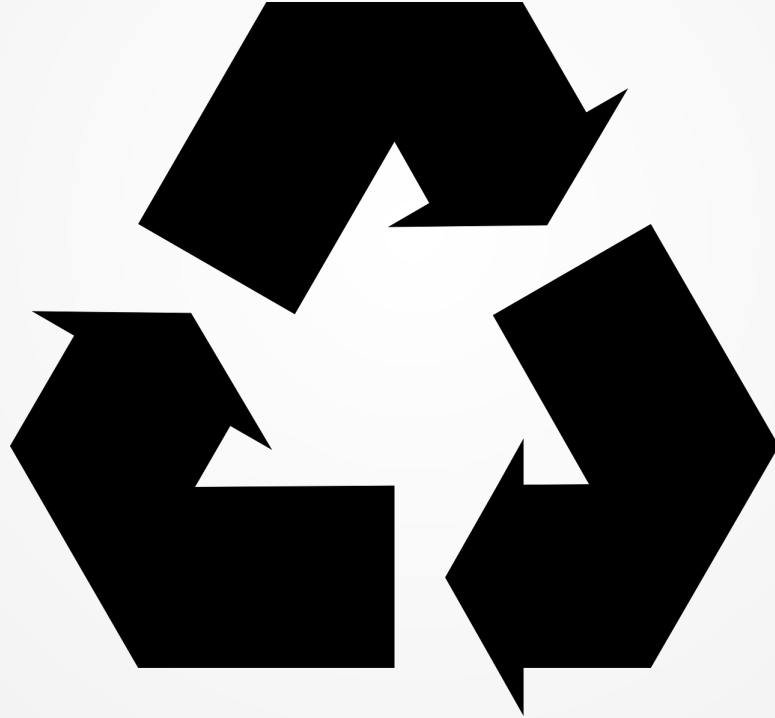
*How we **doin**'?*

3 Your Proactive Prospecting plan

“Jeez, this looks good, **but it also looks like a lot of work & I don't have time** to create unique emails like this for every prospect”

Fortunately, you don't have to.

Make prospecting custom but repeatable



The Smith Agency approach to repeatability

- Monitor for prospects with similar characteristics
 - i.e. SaaS companies who are hiring for sales
- **Turn emails (like the one reviewed before) into re-usable templates**

Create multiple templates for different situations

Smith Agency Example	<u>Reason for Reaching Out</u>	<u>Value Add</u>	<u>CTA</u>
Template 1	Hiring salespeople	Tom Tunguz article	Offer lead gen suggestions
Template 2	Receives funding	David Skok article	Offer lead gen suggestions
Template 3	Something remarkable on the website	Tips on the website	Offer lead gen suggestions

Example - Commenting on the Website

New Message

Templates +

Clear Template

☐ Log in CRM



Hey Jerry,

I noticed the blog post you published last week, "Top 3 Predictions in the Factory Automation Space for 2016". I really liked it. It was high quality content that wasn't spun from thin air - you actually interviewed experts in the field.

I loved the blog article but also noticed the blog didn't offer a lot of ways for visitors to convert into leads. Others in your market are doing some things I notice you are not to convert their blog into a lead generating machine.


I have some ideas for you. Is this a timely conversation? Is there a good time to connect?

BTW, here is who I am, who I work with, and more about why I'm reaching out.
<http://www.hubspot.com/ali-powell-silconvalley>

Ali



Salesperson Landing Page



HI, MY NAME IS ALI POWELL AND I WORK WITH HIGH GROWTH COMPANIES IN SILICON VALLEY.

[SCHEDULE TIME TO SPEAK WITH ME](#)

Are you trying to improve your marketing?

☹️

Thinking of what tools or technology stack you should use for marketing?

About Me.

I have worked at HubSpot for over 5 years. At HubSpot I focus on helping mostly technology and software companies use HubSpot for their marketing. I have helped over 300 companies join HubSpot over the past 5 years.

About My Work.

HubSpot is a great fit for small to medium sized businesses who are focused on improving their marketing with technology. Most of my customers have used either disparate tools OR have used other marketing automation tools before coming to HubSpot.

Why HubSpot?

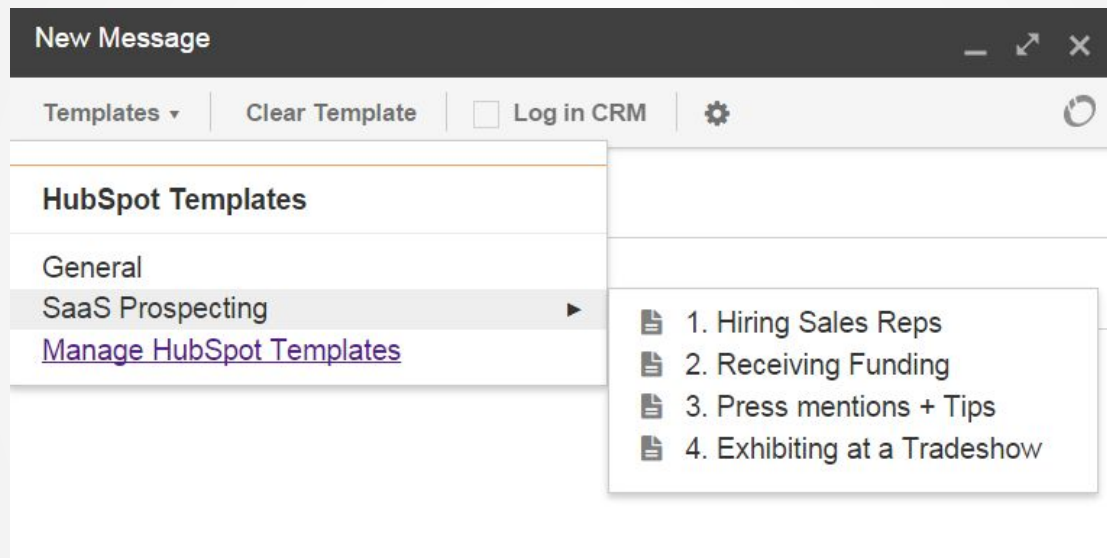
HubSpot is typically a great fit for marketers who want a more integrated platform of tools. Our software is easy to use, all in one and helps with net new lead generation as well as nurturing. You can run all of your marketing processes through HubSpot. By using HubSpot your marketing will become more data driven and more personalized.

If you are assessing marketing platforms here are some helpful resources for you.

- [The Global Marketing Playbook](#) - Develop a global marketing strategy.



Make templates easily accessible for re-use



...and customize slightly for each prospect

“So I create great emails, **but most prospects still aren’t going to respond.**
What next?”

Good question!

8- : Number of touches to
reach a decision-maker by phone,
even when they are interested in
your products or solutions

Use a prospecting sequence to maximize your chance of connecting with a decision-maker

- 1 **Day 1 – Be helpful and attempt to connect**
 - Call / email

- 2 **Day 3 – Did you get my message – Who is the right person?**
 - Call / email

- 3 **Day 6 – Continue to be helpful and attempt to connect**
 - Call / email

- 4 **Day 10 – Continue to be helpful and attempt to connect**
 - Call / email

- 5 **Day 13 – Am I being helpful?**
 - Email

- 6 **Day 16 – The Break Up**
 - Email

Can extend for really good prospects

Example attempts in full included in the [Proactive Prospecting Playbook](#)




Your prospecting plan - summary

- 1 Create prospecting templates
 - Based on prospects with similar characteristics
 - Easily accessible for re-use
 - Customized slightly for each prospect
- 2 Use your templates in a full prospecting sequence of at least 8-12 touches

4 3 More Quick Tips for Success

Tip 1. Use the same approach for inbound leads

New Message

Templates + Clear Template ☐ Log in CRM 

Hi John,

I got a note that you came to our website recently and downloaded our guide SaaS Marketing for CEO's: How to Get to the Top of the Market and Stay There.

If you are interested in the topic, you might also like this accompanying blog article: [SaaS Marketing Trends and Challenges for 2015](#).

I took a quick look at your website and noticed a couple things that would help you to quickly drive more qualified traffic and leads through your site.

Is this a timely conversation to have? Is there a good time to connect?

1

The reason for outreach

2

Provide value

3

Transition to a clear and direct call to action

Tip 2. Monitor engagement & prioritize accordingly

Even if a prospect doesn't respond directly, it doesn't mean they aren't engaged, perhaps very much so



Mark Roberge clicked on link in your email – **Re: 2016 Growth Plan**

06/09/2015



Mark Roberge clicked on link in your email – **Re: Follow Up**

06/09/2015

Spend your best efforts on prospects who read and click your emails (and visit your website)

Tip 3. Continue to nurture your prospects over time

- Not every prospect you reach out to will be ready to buy when you first interact with them.
- Keep a list going of good fit (but not hot) prospects and reach out to them occasionally using the same format outlined in this presentation

5 Wrap up and final thought

What was **ONE**
KEY TAKEAWAY
from the session?



What we reviewed today

1. Why most prospecting attempts stink
2. The format of a successful prospecting email
3. How to make your prospecting as custom but repeatable as possible
4. How to use a prospecting sequence to maximize your chance of connecting
5. 3 more quick tips for success

RESOURCES

....mentioned in this session

1. Proactive Prospecting Playbook
<http://bit.ly/proactiveprospectingplaybook>
2. Youtube for sessions 1-3 on-demand.
<http://bit.ly/ss-vids>
3. Series resource page
<http://bit.ly/ssfa-resources>
4. Agency Grader benchmarking tool (requires email address):
www.agencygrader.com/google



FINAL THOUGHT - AND NEXT STEPS

- Do not sit in a lab for two week creating 25 perfect emails!
- Instead – Just do It!
 - Put together a list of target accounts
 - Start creating and sending Proactive Prospecting emails/voicemails and connecting with prospects
 - Start turning those into customizable templates to which you'll add over time
- Stay tuned for our upcoming Connect Call Lab

QUESTIONS?



Google HubSpot

The break up email is especially effective, but you have to earn it through your previous attempts!

1 Day 1 – Be helpful and attempt to connect

— Call / email

2 Day 3 – Did you get my message – Who is the right person?

— Call / email

3 Day 6 – Continue to be helpful and attempt to connect

— Call / email

4 Day 10 – Continue to be helpful and attempt to connect

— Call / email

5 Day 13 – Am I being helpful?

— Email

6 Day 16 – The Break Up

— Email

New Message

Templates +

Clear Template

☐ Log in CRM



Subject: Re: Acme Software & Sales Positions (reply to thread)

Hi John,

I didn't hear back on my emails below. Given that, I'll go ahead and move on

Did you find the information I shared helpful? If so, check out our [blog](#), where you'll find other great content on growing a SaaS business.

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

Find more email and voicemail
examples in the **Proactive Prospecting
Playbook**

<http://bit.ly/proactiveprospectingplaybook>