

# SALES PROSPECTING

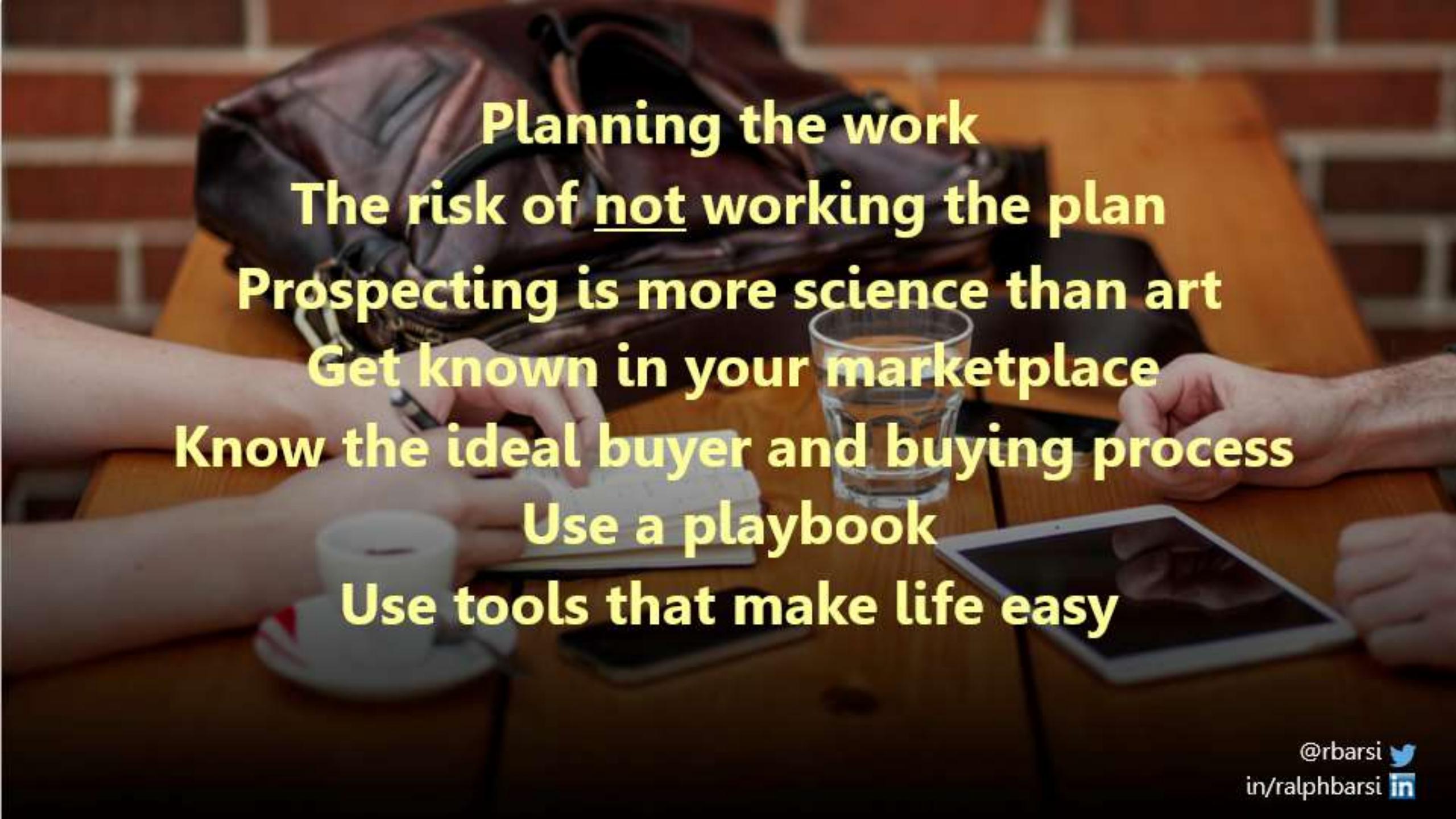
How to Plan Your Work and Work Your Plan



**RALPH BARSI**  
Sr. Director, Sales Development

**Achievers**



A person is sitting at a desk, looking down at an open book. On the desk in front of them are a laptop, a tablet, and a glass of water. The background is a brick wall.

**Planning the work**  
**The risk of not working the plan**  
**Prospecting is more science than art**  
**Get known in your marketplace**  
**Know the ideal buyer and buying process**  
**Use a playbook**  
**Use tools that make life easy**

## Planning the work at Achievers



## SALES DEVELOPMENT RESPONSIBILITIES

Sales Development **creates revenue pipeline**

SDR role is a **hybrid** (inbound *and* outbound)

Measured / comp'd on **meetings and opportunities**

Each SDR **supports AE's** in the field

Instrumental in **territory ownership**

## HOW THEY CONTINUE TO WIN

They **help prepare Quarterly Business Reviews**

They **know our ideal customer profile**

They **understand the buying process**

They **study the competition**

They get **certified on company messaging**

They **reach out to prospects with relevance**

They **always know where they are against plan**

They **take relentless action**

@rbarsi

in/ralphbarsi 

# Planning the work at Achievers

## SALES DEVELOPMENT TACTICS

**Measure progress** (weekly goal cards, dashboards x2)

**Inbound:** SLA, 10 touches in 20 days, work 3 S's\*

**Outbound:** Ridiculous branding

**5 key contacts** per account

*Up to 25 touches* per contact

**Goal:** ~30 completed meetings, ~15 opportunities  
*per quarter*

Each SDR **supports up to 3 AE's** in the field

**SDR's prospect into ~600 accounts\*\***

20% - high-value targets (Tier 1 & 2)

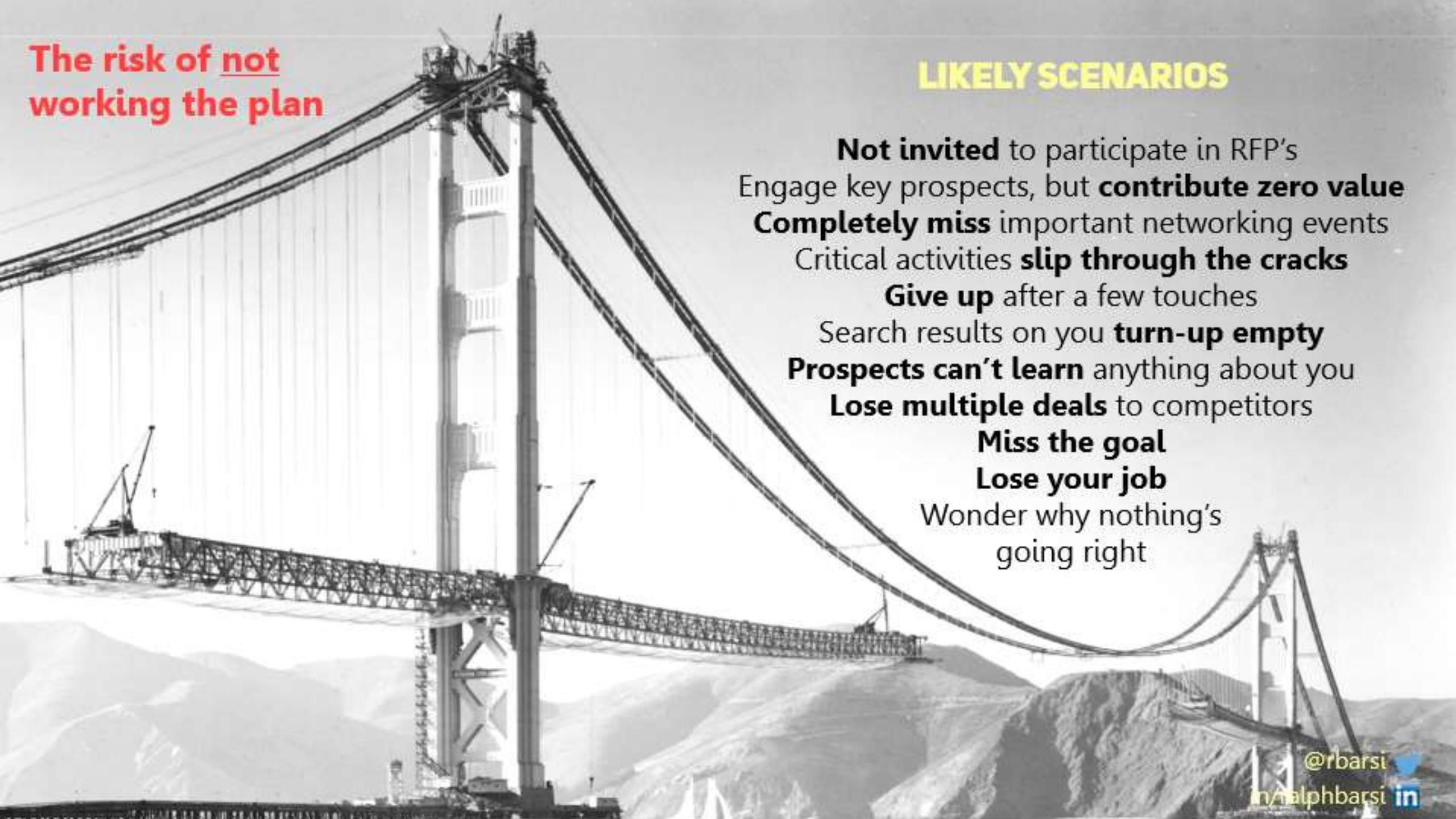
40% - solid targets (Tier 3)

40% - targets

\*Lead Source, Lead Score, Lead Status

\*\*Reconciled against rigorous market analyses





## The risk of not working the plan

## LIKELY SCENARIOS

- Not invited** to participate in RFP's
- Engage key prospects, but **contribute zero value**
- Completely miss** important networking events
- Critical activities **slip through the cracks**
- Give up** after a few touches
- Search results on you **turn-up empty**
- Prospects can't learn** anything about you
- Lose multiple deals** to competitors
- Miss the goal**
- Lose your job**
- Wonder why nothing's going right

Prospecting is  
more science  
than art



Ralph Barsi  
@rbarsi

I prospect every single day, and I've got a  
FAT pipeline. [@JohnMBarrows](#)  
[@insideview](#) #df14 #openlounge

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RETWEETS 3 FAVORITES 1



John Barrows  
@JohnMBarrows

Congratulations to the SDR team  
[@Achievers](#) for getting J.Barrows Certified!  
Excellent work, everyone!

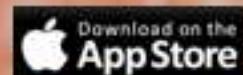
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RETWEETS 3 FAVORITES 2



6:11 AM - 13 Jan 2014

John Barrows  
Download SalesFromTheStreets.com



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# Get known in your marketplace

**Dial-in your LinkedIn profile** | [bit.ly/KokaSextonEpicList](http://bit.ly/KokaSextonEpicList)

**Get referred by your contacts** | [bit.ly/JillKonrath\\_JoanneBlack](http://bit.ly/JillKonrath_JoanneBlack)

**When prospects Google you, show up** | [on.mash.to/10aXlIE](http://on.mash.to/10aXlIE)

**Get better at networking** | [bit.ly/NetworkingDoesntSuck](http://bit.ly/NetworkingDoesntSuck)

**Become an active user of social media** | [bit.ly/VaynerchukSXSW](http://bit.ly/VaynerchukSXSW)

**Attract new business by hosting an event** | [bit.ly/WhyHostAnEvent](http://bit.ly/WhyHostAnEvent)

**Become an expert in your industry** | [bit.ly/Become\\_An\\_Expert](http://bit.ly/Become_An_Expert)

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# Know the ideal buyer and buying process

## Know your fishing spot

- Territory at-large
- Major metro areas
- Top 5 industries

## Know when to fish

- Most B2B's buy in Q1 & Q2
- Most execs talk on Tues & Thurs
- Call between 10am & 4pm

## Know why to fish

- Find relevant trigger events
- Similar companies, similar pain
- There's no bait like yours

You can't take a fishing boat out and just EXPECT fish to jump in the boat!



## Know who to invite

- Ask senior leaders for intros
- Leverage channel partners
- Bring a customer on your call

## Know what gear you need

- Sales intelligence tools
- CRM
- Auto-dialer

## Know how to use bait

- Short, concise messages
- Demand Generation
- ROI analyses

## Know what type of fish you want

- Company size (employees, revenue)
- Exact titles, roles

# Use a playbook!

## Wait. Why?

- It's **scalable & repeatable**
- It **consolidates disparate, decentralized info**
- It **standardizes messaging**
- It **helps quickly ramps-up new hires**
- It **reinforces struggling reps**
- It **reminds seasoned reps**
- It **increases productivity**
- It **drives corporate initiatives**
- It **prevents stuff from falling through the cracks**
- It **influences behavior**
- It **pushes YoY growth in multiple areas**

## Hmm. How?

- Choose your **stakeholders and author(s)**
- Get **support from senior leadership**
- Establish **a deadline for getting it done**
- Fix one problem** (prospecting, qualifying, closing)
- Know **it's an ever-evolving document**
- Make it **accessible from anywhere**
- Find and talk to **organizations** already using one
- Search **#salesplaybooks** on Twitter
- Tie it to the **organization's goal**
- Map key areas of the **playbook to your CRM**

## Use tools that make life easy\*

**bit.ly** - shorten, share, and track your links 

**Evernote** - the workspace where everything gets done 

**IFTTT** - put the Internet to work for you 

**Tripit** - keep all your travel plans in one spot 

**Klout** - helps you be great at social media 

**Hootsuite** - enhance your social media management 

**Buffer** - an easy way to share what you're reading 

**InsideView** - stay informed about your prospects 

**SalesLoft** - helps you find the exact prospects you want 

**MailTester.com** - test the validity of email addresses 

**RelSci** - identify contacts who may not be online 



\*These are just a few!

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