The Ultimate Guide To Inbound Lead Follow-Up & Conversion

spiceworks | ZIFF DAVIS B2B Skaled

Introduction

Only 10% of B2B companies follow up with inbound leads within the optimal 5-minute window.[1] We wonder why this is the case when we know Sales is hungry for leads and will take a full pipeline over a dry pipeline any day. One hypothesis is that Sales doesn't have the bandwidth to handle high volumes of inbound leads in a timely manner (i.e. 5 minutes or less). The second hypothesis, and the most likely, is that Sales doesn't seem to have the bandwidth because they haven't put the proper processes and technology in place to help them succeed.

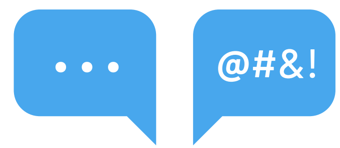
B2B buyers are busier and more informed than ever. They want fast, relevant follow-up and they want your organization to make it as easy as possible for them and to communicate through the channels they prefer. What does this mean for lead follow-up by Sales and your organization as a whole? That fast, multi-touch, omnichannel follow-up is crucial to closing deals and hitting revenue goals.

That's why Skaled and Spiceworks/Ziff Davis B2B have partnered to bring you *The Ultimate Guide to Inbound Lead Follow-Up & Conversion* that covers best practices for handling high volumes of inbound leads starting from Marketing and Sales alignment, to the Marketing to Sales handoff, to fast Sales follow-up, and the technology needed to make the process more efficient.

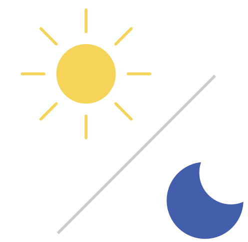
The Ultimate Guide to Inbound Lead Follow-Up & Conversion addresses the first breaking point in the sales process and surrounding factors beginning with marketing alignment. There is often a gap in organizations' understanding of what should happen post lead generation and post marketing qualification and the first steps sales should take to increase contact rates and conversion.

We've surveyed 100 senior B2B Sales and Marketing professionals to get a deeper look into the challenges of team communication, handoff, and follow-up within B2B organizations. Our analysis of answers showed a few trends across companies:

27% believe their Marketing and Sales teams still aren't aligned on when a lead generated by Marketing should be followed up with by Sales.



Communication was the top frustration in the sales to marketing handoff.



Only 11% of organizations follow-up on marketing qualified leads within 5 minutes. The most popular response time was within 24 hours at 37%.

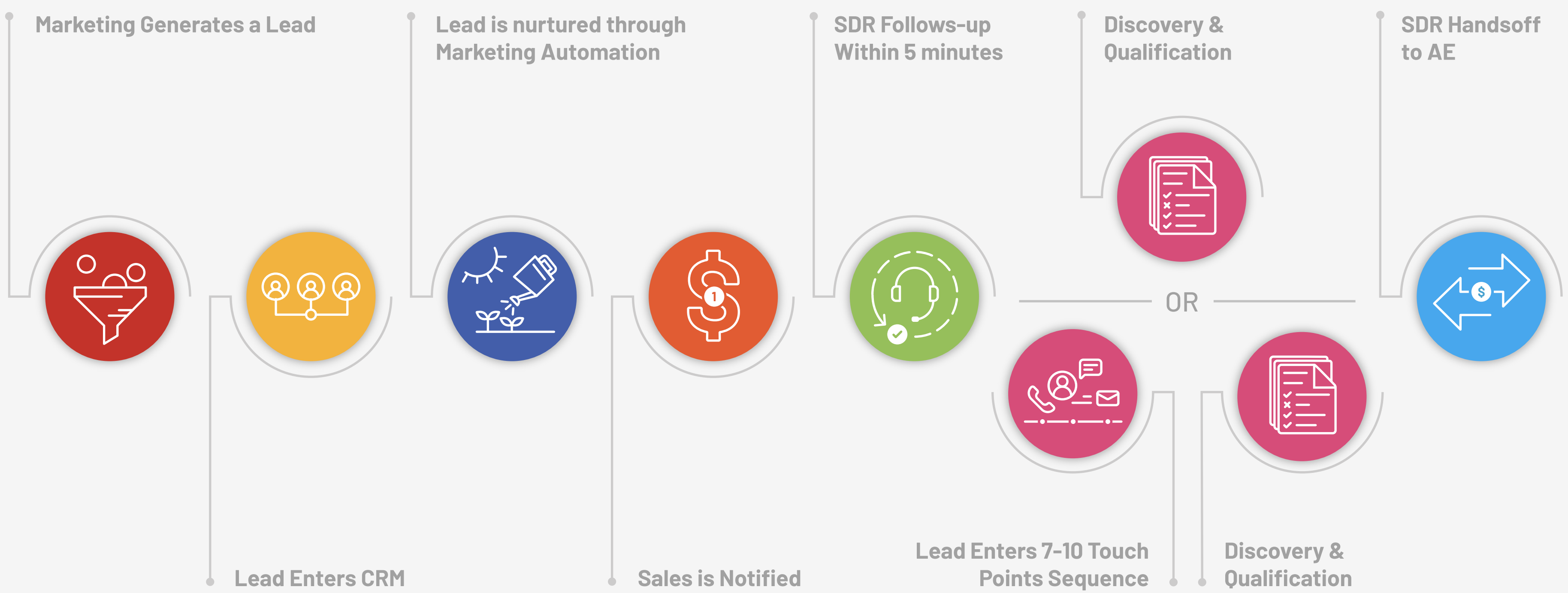
We also interviewed 15+ Marketing and Sales experts, from Directors to CMOs and CROs, to get a better look at both sides of the coin. We started with Marketing gurus to address the alignment of Sales and Marketing, technology integrations and nuances, and the process behind lead generation/lead nurturing before a lead is qualified and followed up with by Sales.

Then we spoke to Sales gurus to address the follow-up process once an inbound lead comes in, alignment with Marketing from their perspective, and the tools necessary to execute fast, effect follow-up. We've included their experience and knowledge through this ultimate guide in order to help you build an even better follow-up Sales engine.

Table of Contents

*In this ultimate guide, we'll be covering the follow-up process and tactics of inbound leads by Inside Sales teams. Depending on your organization's structure, you may route inbound leads through Sales Development Reps, Business Development Reps, Lead Developments Reps, or straight to sales reps who qualify and close deals. To remain consistent in terminology, we'll use the term Sales throughout this ultimate guide, but it is meant to be an umbrella term to cover all aforementioned roles, as long as the function of the role is to follow-up with and qualify inbound leads from Marketing.

The Inbound Lead Journey



Perfecting the Marketing to Sales Lead Handoff

35-50%

We've all heard the mind-boggling statistic that says 70% of the buyer journey is complete before a buyer speaks to Sales.[2] It should make the lives of our Sales reps easier, right? The buyer already knows your organization's solutions, they're interested, they're considering, they may even have already shown intent to buy. So, where's the problem?

A lead coming to Sales 70% of the way through their purchase decision simply means the conversation and follow-up are now different. Not that the buyer has already done 70% of Sales' job for them. Competition is fierce in the B2B world and a Sales rep's window to respond and convince is now even tighter. Therefore, there can't be any leaks between Marketing's touches and Sales' or buyers will absolutely find another solution.

of sales go to the vendor that responds first.[3]

It's up to Sales to follow up within 5 minutes with the appropriate message, but it's Marketing's role to make sure the right leads get to Sales. Therefore, before we get to follow-up best practices, let's make sure your Marketing to Sales handoff is buttoned up and your pipeline isn't leaking deals.

Understanding What Ultimately is Considered a Lead

Ultimately, the disconnect between Marketing and Sales is communication. In order to truly understand what an MQL or an SQL is, you have to have set rules of engagement. If SDRs, BDRs, AEs, and Marketing don't have alignment on what is an MQL and what is an SQL, reps can finesse the system and create chaos across the board.

What I see as a major disconnect is not understanding what truly is a lead.

Now you have pipeline that isn't real. You have deals that aren't closing and the projections that you have from a sales ops perspective are completely off. So, what I see as a major disconnect is not understanding what truly is a lead. That also stems from not communicating on what that means for the organization, and is this truly going to build pipeline or X revenue for us.

Morgan J Ingram
Director of Sales Execution and Evolution, JBarrows Sales Training

Responsibilities & Alignment

ROLES & RESPONSIBILITIES: INBOUND SALES & MARKETING FUNNEL

Marketing
To contribute to revenue goals by generating quality leads.

Sales
To generate revenue for the organization with effective follow-up, qualification, and high conversion.

- Owns the top portion of the Marketing and Sales funnel including the stages of Awareness, Interest, Consideration, and Intent.
- In being responsible for the top half of the funnel and content production, Marketing's role is to drive demand and generate quality leads by delivering the right content at the right time for the right audience.
- Marketing generates MCLs and further nurtures them into MQLs before handing off to Sales.
- Marketing must help Sales prioritize inbound leads by exposing their intent to purchase and identifying them as a good fit for the company's solutions.
- Convinces buyers through relevant content and messaging that their service or product can solve a problem that they have.

- Owns the bottom portion of the funnel including the stages Intent, Evaluation, and Purchase.
- Sales is responsible for inbound lead follow-up and qualification specifically focusing on the overlapping section between Marketing and Sales: Intent.
- Must build and continuously optimize the follow-up process to improve conversions and help move deals through the path of purchase.
- Sales not only qualifies MQLs to SQLs but must create a feedback loop with Marketing so Marketing can better understand why certain leads were qualified and some were not.
- Identifies the unique needs of buyers and provides them with a solution to their problem, be it a service or product.

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A big obstacle between Sales and Marketing can be the perception that the focus of Marketing is just MQLs and the focus of Sales is just conversions and bookings. That's a missed opportunity for collaboration because it fails to acknowledge the fact that there's that space in the middle where everybody needs to work together.

Ethan Zoubek
CRO, Campaign Monitor

CONSCIENTIOUS ALIGNMENT: BUILDING YOUR HANDOFF PROCESS

Sales and Marketing may have different metrics and KPIs that hold them accountable, but both teams have one overall goal: to generate revenue. The biggest misalignment between Sales and Marketing is not conscientiously aligning under this shared goal or having an agreement in place that holds them to it and genuinely sheds light on separate and combined goals of each team.

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Chaz Knauft
Senior Manager of Sales Development, ZoomInfo Powered by DiscoverOrg

> Both sides need to understand what matters to the other. From a Sales standpoint, I really care about conversion rates, and our Marketing team has done a really good job of understanding that. We've also done a really good job of understanding what Marketing cares about at each point in the funnel, and what do they need from us to create a better buyer experience. Communication is just about being honest with one another and it's probably been the biggest factor in being able to achieve what we've done here.

Before a lead is ever qualified by Marketing and on its way to Sales to further qualify, Marketing and Sales need to have agreed upon two things: a clearly defined Service Level Agreement (SLA) and the specific buyer personas within your Ideal Customer Profile (ICP). For Marketing to properly segment and route leads and for Sales to properly follow-up with inbound leads, an SLA and clearly defined buyer personas are a must-have, and they must receive the stamp of approval by both teams.

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The value of marketing is really in Sales and our ability to help not only keep the lights on but make things shine brighter.

Ryan Hadfield
Director of Marketing, Lead Generation
ZoomInfo Powered by DiscoverOrg

Service Level Agreements (SLA)

Documenting an SLA between Sales and Marketing makes sure both teams understand the goals of the other and are aligned on what actually qualifies as a lead and can be converted to new business. An SLA can also be a map to exactly when Sales needs to follow up with a lead while helping them to prioritize.

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Udi Ledergor
CMO, Gong.io

A common frustration in the Marketing to Sales handoff is simply Marketing sending leads to Sales that should not have been sent in the first place. This is usually caused by either a lack of an agreed set of qualification criteria between Marketing and Sales, or Marketing taking too many liberties around what constitutes a qualified lead. On the other side, Sales may not always keep their end of the deal, and just because they don’t see an immediate opportunity in an otherwise qualified lead, they may choose not to accept it.

For example, a lead that fills out a Request a Demo or Contact Us form warrants immediate follow-up. Whereas a lead who downloads a single white paper would typically need to meet other criteria or be nurtured by Marketing before warranting a Sales follow-up. In which case, Sales and Marketing would have documented in their SLA to split leads into two buckets of hot leads that go straight to Sales to be contacted and warm leads that would enter a nurture campaign until meeting, for example, a set criteria of downloading 2 other pieces of content, visiting the website multiple times, or reading 5 blog posts, etc.

EVERY SALES AND MARKETING SLA SHOULD COVER AT LEAST THESE KEY AREAS:

1. Summary of Agreement
2. Goals of Marketing
3. Goals of Sales
4. Clearly defined MQL, SQL, SAL, ICP, and buyer personas
5. Needs of Marketing to Reach Their Goals
6. Needs of Sales to Reach Their Goals
7. Consequences if Goals are Not Met (for both parties)
8. *Conditions of Cancellation (in pursuit of a better SLA)

A common mistake when developing a Sales and Marketing SLA is being too broad or high-level. Yes, leadership needs to have a birds-eye view into who is responsible for what portions of the buyer journey and who is on the hook for what portions of the pipeline, but Sales and Marketing teams also need a concrete understanding of what is considered marketing qualified and sales qualified: if there are gaps in the process, if there are common obstacles, and how they should be addressed.

> Honestly, the most important thing is actually coming up with a process. Once the process is documented it will provide full visibility, allowing both Marketing and Sales to be on the same page. As for what does that sales process look like, take a holistic look at it and say, okay, here are the drop-offs, how can we make this process a little bit more seamless? Are there any roadblocks? Those sorts of things. That's what you need to do in order to optimize the sales process, allowing for informed decisions.

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Verrion Wright
Director of Marketing, Contently

Ideal Customer Profile & Buyer Personas

An Ideal Customer Profile (ICP) helps organizations identify what companies would benefit most from their solution and have a real need for it. An ICP clearly defines these hypothetical companies by company size, average revenue, industry, location, etc. Without a documented ICP in place, Sales and Marketing will most likely be targeting two different profiles or casting a wide net with low conversations.

> **Buyer Personas are semi-fictional and generalized representations of your ideal customers. They help you to better understand the behaviors, goals, challenges, and concerns of prospective customers in order to create tailed content and have valuable conversations.**

> What more organizations need to do, and what we did first in marketing, is go through an ideal customer profile exercise. There will be plenty of people that will come inbound to many businesses, but they're not always going to be the right buyer. So there needs to be a filter that says here are the new names, but then here's a stage that says this is a new name and an account I can sell to and is exhibiting the right set of behaviors. It's important to very clearly identify what is in your ICP so all net new names have to hit another set of criteria before moving through.

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Heidi Bullock
CMO, Tealium

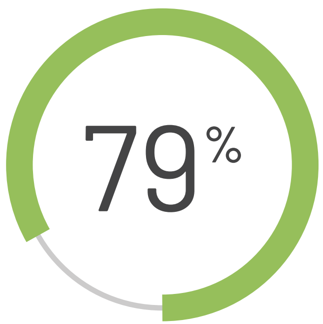
When documenting your buyer persona's make sure to include:

- Demographics/Identifiers - What is their age? Income? Education? Does this position skew male or female? What is their communication style?
- Goals - What are their primary goals in this position? What would they be measured on for success?
- Challenges - What are their common challenges?
- What We Can Do - How can your organization help this persona achieve his/her goals?
- Common Objections - What are the common objections this persona would have about your product/services?
- Real Quotes - How would they put their goals and challenges in their own words?

Every B2B company has an ICP, but within this ICP are different points of contact or buyer personas that Marketing must nurture and Sales must connect with. Setting buyer personas in stone helps Marketing further target and qualify leads before alerting Sales to follow-up. It allows them to segment their campaigns and provide valuable information to Sales based on what content that persona interacted with most. A common disconnect between Marketing and Sales is Marketing will generate their required number of leads, but if the leads they are attracting aren't within the right ICP or have decision making power, Sales will not be able to turn leads into deals because the company isn't a right fit or Sales will be talking to the wrong person without a clear line of sight on how to get to the right person.

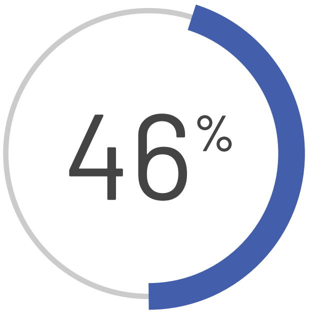
USE LEAD DATA & LEAD SCORING TO INCREASE ALIGNMENT

After Sales and Marketing have sat down and defined their SLAs and buyer personas, the next step in ensuring a smooth handoff and more quality leads in the pipeline is to utilize lead data and lead scoring to develop more robust campaigns that allow Sales to focus on the leads that matter most.



of B2B marketers also have not established a system for lead scoring.[9]

of leads are legitimate and should advance to sales.[10]



of marketers with mature lead management processes have sales teams that follow up on more than 75% of marketing-generated leads.[10]

Less than 25% of new leads are sales ready.[4] Lead scoring helps Marketing rank leads and determine the sales-readiness of the majority 75% based on behavior, demographics, and firmographics. Lead scoring can further strengthen the relationship between Marketing and Sales by eliminating the distraction of unqualified leads and increase sales productivity by setting a black and white methodology for follow up.

Your organization may lead score using a point system or A, B, C, D rankings. Either methods work - choose the best fit for your company. The important factors that must be included in your scoring system are the combination of behaviors + demographics/firmographics to determine scores or ranks.

At the end of the day as marketers, we know which variables make the most sense and what it is that we're trying to learn from these different audiences. And most of the time it comes from the demographic and behavioral metrics. We know what those demographics are. We know what those behaviors are. We don't need to divvy them up in different areas or make it more complex to apply those scores and to make it make sense... If you get a CMO from a country that you don't sell to, then you know that's a waste of time for the SDRs. So one of the first things you can do is degrade certain regions or countries from a scoring standpoint to help prioritize high volumes of leads.

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Verrion Wright
Director of Marketing, Contently

For instance, a lead may meet a certain score threshold based on their actions and behavior, accumulating a high score because they frequently visited your website, downloaded content, and opened/clicked emails. However, their type of business or company size could be completely wrong for your solution. In which case, they haven't really met the criteria set in your Marketing and Sales SLA. Or a company's profile could be within your ICP, but if they haven't shown interest or intent by behavior then they are not ready to be passed to Sales. And that's how lead data (demographics/firmographics) plays into your scoring system. A system that tells Sales the right time to follow-up backed by a lead's contact data to help eliminate ambiguity of lead qualification.

Lead behavior can be broken down in a few different ways such as recency, frequency, and type of engagement.

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Nick Robinson
Digital Demand Gen Director,
SAP North America

Types of engagement should be assigned different levels of points. For instance, an event lead is obviously going to have a larger score versus a lead who downloaded a white paper. Recency is self-explanatory and looks at the last time a lead engaged with you and will degrade over time. Frequency is how much they've engaged with your content.

All of that is just to get somebody from somewhat interested to hit a certain scoring threshold and then the lead gets routed to your business development or sales development team.

What also works well when handling high volumes of inbound leads is tiering leads by priority based on their behavior. For instance, a priority-one lead would be someone who requests a demo, pricing, or submits a contact us form. Priority two would then be based on the frequency or amount of content they've consumed.

As much information as Marketing can pass to Sales before they connect with a prospect is extremely valuable to follow-up and this starts in the actions a buyer takes before becoming a marketing qualified lead. It helps your team avoid being a part of the 42% of Sales reps that feel they don't have enough information before making a call.[13]

More Shared Context & Information Creates a More Delightful Experience

There's just not enough context and information in the handoff to make both the salesperson's role, but more importantly, the lead's buying journey, delightful. There's nothing more frustrating, even as a consumer, to be looking for help or information and the first person to pick up the phone asks some identification questions, you give them all of that, tell them your story and they put you on hold, and five minutes later you're talking to someone else and they ask you the same set of questions again.

A lot of the time B2B sales experiences feel like that as well. Why are we not expecting our B2B process to be as smooth as the consumer buying process that we all want to experience at home? If an SDR already asks a buyer questions or the buyer has filled out some information on a marketing form, all of that information needs to be available and read and used by the salesperson taking the demo. They should not be repeating all the questions a buyer has already answered either in a form or discovery call. To do that, you need to have a system in place to aid capture, transfers, and aggregates that information throughout the process, and use that information to provide a delightful buyer experience.

Udi Ledergor
CMO, Gong.io

ESTABLISHING CLEAR LEAD ROUTING RULES

Implementing proper lead routing not only affects speed to lead but conversions. It goes hand-in-hand with tiering or scoring leads based on behavior and demographics/firmographics and nurturing them until they are ready to be routed.

Step one is routing leads at the right time. Determining if a lead isn't a demo request or contact me now about pricing, what does the nurture process look like for a lead that isn't a "demo request" or a "contact me now about pricing" before routing that lead to Sales?

Step two is routing them to the right person. The round-robin approach is a common practice when a lead needs to be qualified by a qualification rep: SDR, BDR, MDR, etc. However, if a lead requests a demo or pricing, and they're a VP of a 1000+ company, you may want to route them directly to an AE for a higher-level conversation and skip the discovery step (hint: especially if they've engaged or shown interest in the past). Perhaps, a lead comes in from a specific account a certain rep is already going after. Obviously, this lead needs to be routed straight to that particular rep. Depending on the depth or intricacies of your organization, a "tiered round-robin" approach is more effective and will better serve your buyers.

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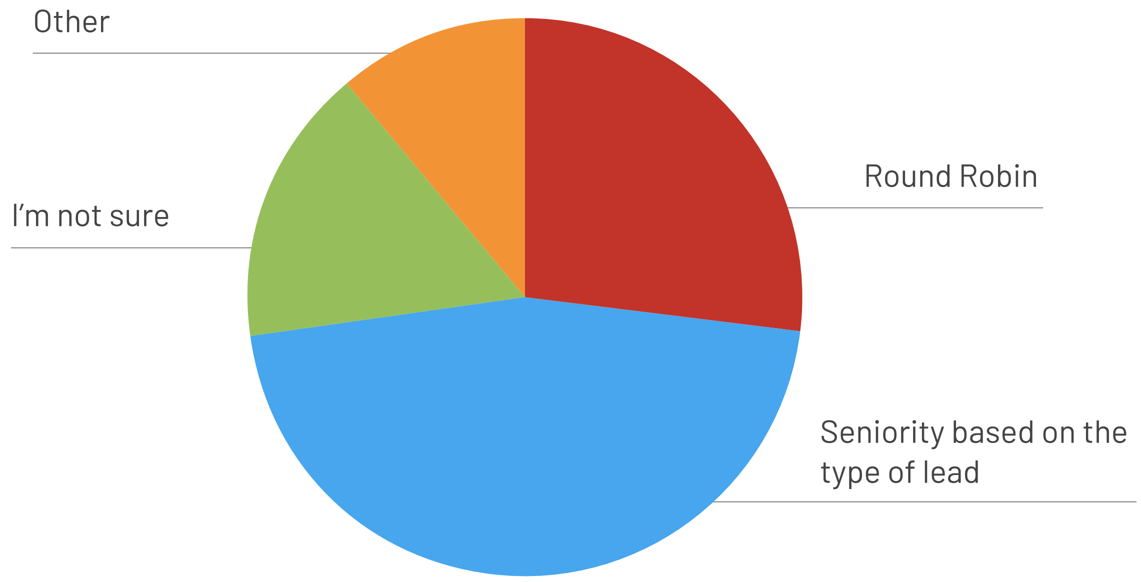
Sam Glushakow
Director of Sales,
ZoomInfo Powered
by DiscoverOrg

We've actually tiered our round-robin approach so certain inbound leads go to certain reps based on criteria we have in place. So maybe an enterprise level lead or account comes in, they would get routed to a more experienced AE versus an AE that was just promoted from SDR.

Step three is being able to follow up with the right message. This seems pretty obvious, but organizations can often overlook this step. Especially for leads who aren't as simple as "requested a demo." When a lead gets routed to Sales, a rep may have the same conversation or formula for every single follow-up. This goes back to a rep not having all the information or insights into a buyer's actions. Knowing what content a lead downloaded or frequently viewed can paint a pretty clear picture of what they're interested in if your organization has multiple products or solutions. This lead or contact information must also be routed to Sales in order to follow-up with the right message.

How does your organization structure lead routing?



Value		Percent	Responses
Round Robin		27.0%	27
Seniority based on the type of lead		46.0%	46
I'm not sure		16.0%	16
Other		11.0%	11

Totals: 100

CREATE A FEEDBACK LOOP

Creating a consistent feedback loop between Marketing and Sales is a final but important step in aligning the two teams for a more effective inbound lead follow-up process. Marketing could think they are doing everything right - they're generating leads, scoring is established, routing is smooth - but conversion and close rates are still not as good as they could be.

A great feedback loop from Sales to Marketing consists of both qualitative and quantitative feedback to really understand what's working and what's not working. KPIs and metrics are critical, but there's a lot of insight that can be lost if we only look at numbers. Teams should also look at why leads from this campaign are good, and why leads from another campaign are not. This helps Marketing get input from Sales to actually drive change in their investments and initiatives and so on.

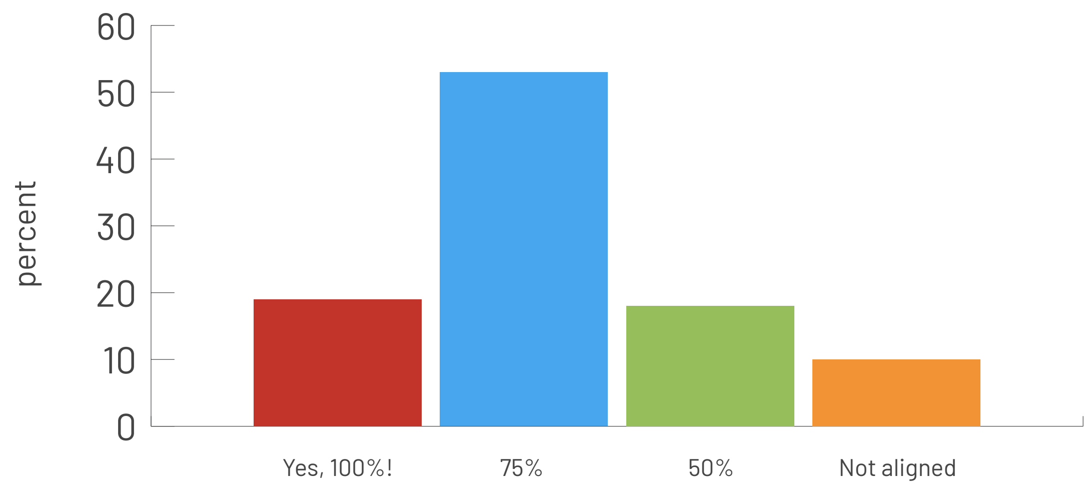
“” **Felipe Engelhardt de Carvalho**
Director of Customer Operations, Pipefy

Our business operations team has been extremely instrumental in helping to put in place systems and processes to ensure that leads and contacts don't age inappropriately. We have quick, standing meetings multiple times a week where we review reports of everything that's come in and what's happened with it. We go from MQL to SAL to SQL to review every step of the process through to active pipeline. And we do these reviews with the Marketing and the SDR teams so there's a continual feedback loop so everyone knows what's going on and what to optimize.

“” **Ethan Zoubek**
CRO, Campaign Monitor

Sales can complain all day that leads aren't qualified or closing but without sitting down and creating a weekly standup to walk through the way some leads are qualified and some leads aren't, Marketing won't know what to change and what to optimize. Take a queue from a company that emphasizes multiple standups.

Do you believe your Sales and Marketing organizations are 100% aligned?



Value	Percent	Responses
Yes, 100%!	19.0%	19
75%	53.0%	53
50%	18.0%	18
We’re not aligned at all.	10.0%	10

Totals: 100

Expert Insights

WHAT WOULD BE YOUR TOP TIP FOR MAKING THE MARKETING TO SALES HANDOFF SMOOTHER?

Set appropriate and realistic expectations during the planning process for both Marketing and Sales and then over communicate. Once you set expectations, you must have very clear visibility on how you're tracking those expectations and your KPIs. Create the necessary dashboards and reports that allow you to baseline and track the activity within each team and the handoff.

For instance, make sure to have clear SLAs for sales and make their job easier by including the necessary lead information right when they receive it - behavioral/activity data, firmographic data, lead score, etc. This will not only allow you to build stronger relationships with your sales org, but it will also increase your conversion rates.

> **You must operate as one aligned team. You won't be successful operating in a silo.**

Harmony Hickman Anderson
Director, Demand Generation at Outreach

WHY DO YOU THINK YOUR ORGANIZATION HAS SUCH COHESIVE ALIGNMENT?

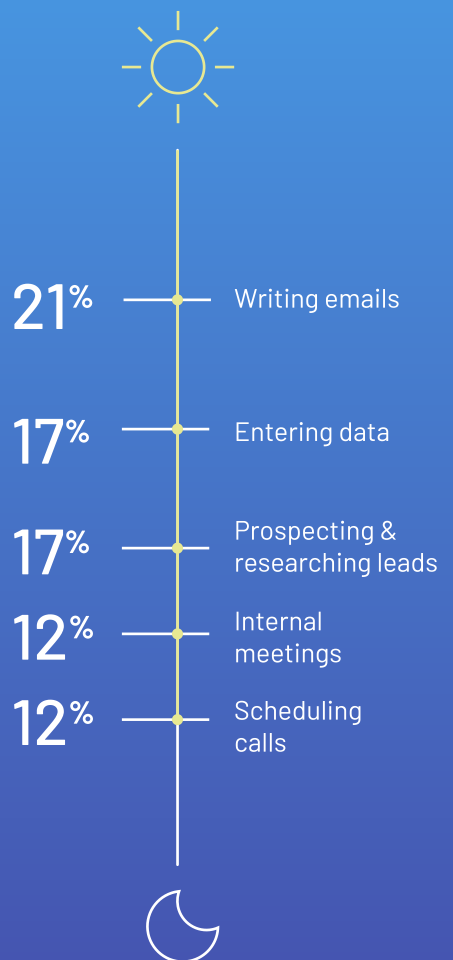
We have a great culture of alignment between sales and marketing. Two things I want to call out: First, we're aligned on what we celebrate. Second, Sales is open to experiments by Marketing.

Marketing only celebrates if we hit the quarterly bookings target. There are no points for generating a bunch of leads if we don't hit our bookings number. That builds credibility so that Sales is open to trying a potential new lead source even if it's not proven yet, which ultimately helps us tap new sources of demand without facing friction.

Ryan Nichols
VP Product and Marketing, Zendesk Sell

A DAY IN THE LIFE OF A SALESPERSON

Salespeople spend just one-third of their day actually talking to prospects.



Building an Effective Inbound Sales Follow-Up Process

According to a 2018 lead response report study by Drift, only 42% of B2B companies are following up within a five-day timeframe.[1] This means that 58% of companies aren't responding within five days when the optimal time is within 5 minutes![5] The same report also shows that although 42% of companies are following up within a few days, 90% of the total companies from their report still didn't hit the 5-minute benchmark.

10x 10X decrease in contact rate after the first 5 minutes.[5]

46hrs Calls made within one minute more than double the contact rate of waiting the industry average of 46 hours to follow up.[7]

27% Research by InsideSales.com showed only 27% of leads ever get contacted.[8]

The first step in building an effective inbound lead follow-up process is exactly that: building a process. From our own research, 37% of the organizations we surveyed set the standard that all inbound leads need to be followed up with within 24 hours, but after that initial touch, then what happens? When do you follow up next? Is it via phone or email? How many times should you follow-up before giving up?

In this next section, we'll cover industry best practices and teach you how to build a foundation for your follow-up process. Keep in mind that every organization is unique and should continue to test their own sequences, communication channels, and number of touchpoints overtime to find the best mix that produces optimal results.

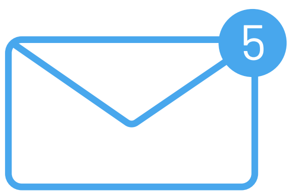
The need for sales engagement and automation software is also imperative to setting up a follow-up process and sequences for high volumes of inbound leads. It's really no longer an option not to automate follow-up. Sales just has to be very deliberate in their messaging to still bring that relevancy and personalization to lead follow-up as much as they can.

> A lot of people have a tendency to think about automation and engaging with a salesperson as two different processes. Yet, when it's done well, the two work together. The right information flows to both the prospect and the salesperson. That allows any member of your team to engage in a highly personalized way and improves the overall experience that customers have with your brand.
>
> **Adam Johnson**
> Senior VP of Sales,
> Active Campaign

CRAFTING YOUR FOLLOW-UP SCHEDULE & STRATEGY

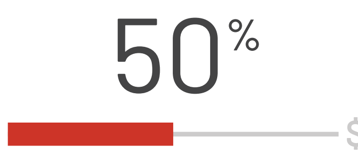
After your organization has gone through the steps of building an SLA, nurturing leads to intent, and smoothly handing them off to your Sales qualification team, it would be silly to let leads trickle from the pipeline now. Developing a follow-up schedule and communication standards will make sure your qualification team knows exactly when and how to follow up with leads.

A follow-up schedule should aim to be reasonably persistent to keep your company top-of-mind, but not berating to where leads know who you are, but feel less of a propensity to work with you on account that you've become irritating.



The optimal number of email messages is five.[12]

93% of all converted leads are reached by the sixth call attempt.[12]



50% of sales happen after the fifth touch.[13]

The exact number of touchpoints for more conversions will vary per organization and buyer, but a good rule of thumb to start with is 7-10 touches.[11] This number may seem low compared to outbound efforts, but remember this type of lead has already shown interest by requesting more information or to be contacted.

In our example follow-up sequence in the next couple of sections, you'll notice we suggest "16" total touches. This is because we include LinkedIn in our follow-up schedule and consider connecting on LinkedIn and interacting with content touchpoints as well, although you could consider it a soft touch.

When crafting your follow-up schedule, you also want to build in the right amount of time to wait between each touchpoint. At least 24-48 hours between touchpoints in the beginning of your schedule and about 72 hours the longer a lead goes through your sequence without a response. You want to give leads time to respond, but be persistent enough that they don't move on to a different solution. As long as you're "professionally persistent" most inbound leads who have reached out to your company first, will appreciate the consistent follow-up.

> The vast majority of the time, even with a very persistent amount of follow-up, most prospects say, 'Hey, you know, I've been thinking about you guys. I've been busy. I appreciate you continuing to follow-up.'

Chaz Knauft
Senior Manager of Sales Development,
ZoomInfo Powered by DiscoverOrg

Phone and email follow-up should also be conducted at different times of the day. This seems obvious, but so does creating a follow-up schedule. Often times we'll space out our outreach but don't think about varying our times and days of the week.

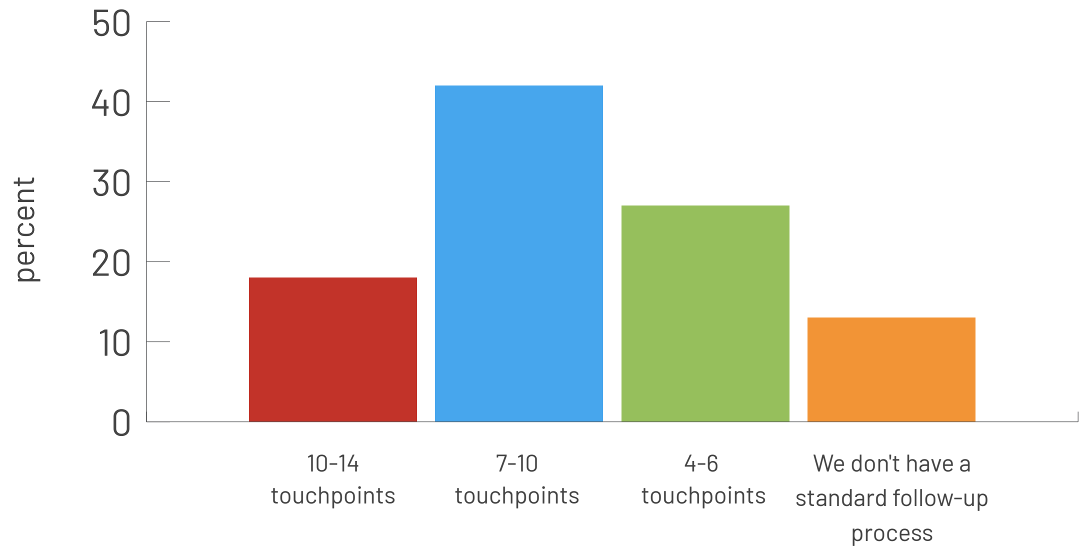
A prospect may have a recurring meeting every Tuesday at 2:30 PM. Therefore, if you call them at 2:30 every Tuesday, you'll never be able to connect with them.[16] In the section, Response Time: The #1 Way to Increase Contact Rates, we also cover the best times/days to call and email leads to think about when crafting your follow-up schedule.

You also never want to set and forget your follow-up schedule, meaning after you craft it, report on results. The first sequence you build will probably not be the best and your buyer's behaviors will change over time.

> We used to see much lower numbers and a lower connect rate before we started doing a lot of experimentation and iteration in the process to bring this up, and now we have the best connect rate we've seen in the past few years.
>
> We experimented with different cadences or emails and different lengths of cadences. For example, does a longer cadence have more impact or a shorter cadence with more touchpoints? Does a local dialer work better in getting people to pick up the phone? There are a bunch of small hypotheses that we run every month to continually tweak and improve our process.

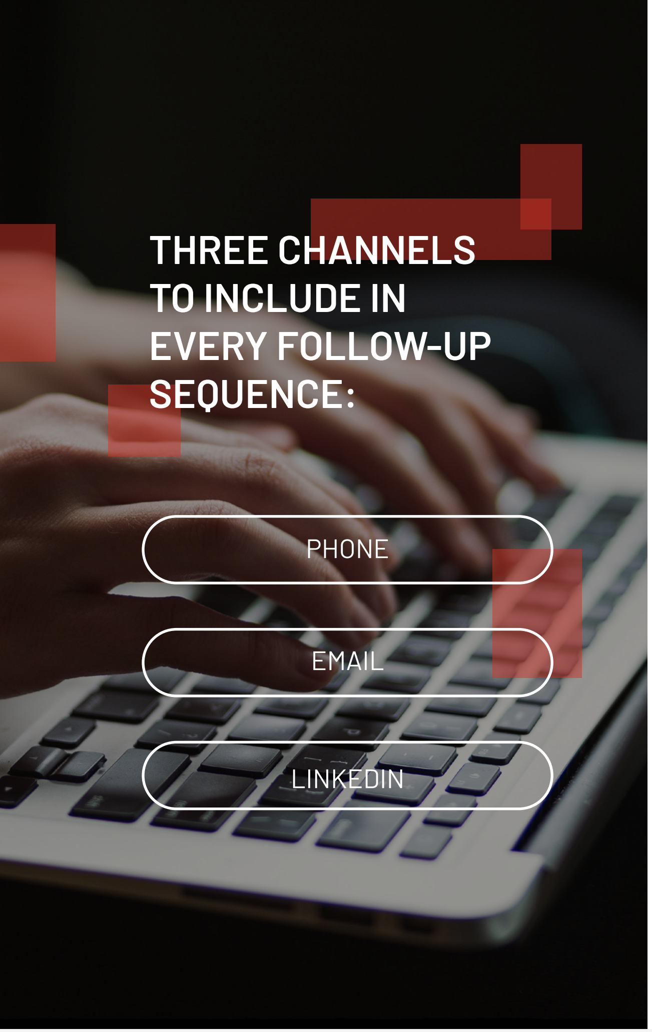
Felipe Engelhardt de Carvalho
Director of Customer Operations, Pipefy

How many average touchpoints have seen the most success in conversion in your inbound lead follow-up process?



Value		Percent	Responses
10-14 touchpoints		18.0%	18
7-10 touchpoints		42.0%	42
4-6 touchpoints		27.0%	27
We don’t have a standard follow-up process.		13.0%	13

Totals: 100



THREE CHANNELS TO INCLUDE IN EVERY FOLLOW-UP SEQUENCE:

- PHONE
- EMAIL
- LINKEDIN

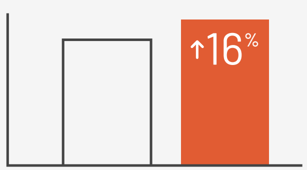
COMMUNICATION CHANNELS

The basic two communication channels in a follow-up sequence are phone and email. Leads that are sent email messages in-between phone contact attempts have a 16% higher chance to be contacted by phone.[12] However, there is a third channel of communication that should be built into every follow-up sequence.

> You have to have a multichannel approach. You should immediately, if a lead comes in inbound, connect with them on LinkedIn. It's important that you immediately put a face to the name. People are used to automated emails on, 'Hey, saw you download the white paper,' or 'Hey, saw you checked out the webinar,' but not a lot of reps follow-up with LinkedIn as a step. Someone comes in inbound, connect with them on LinkedIn, putting a face to the name, and they'll view your profile. Then send your emails, do your calls, and leave voicemails. Those three or so steps on multiple channels will get you more meetings.

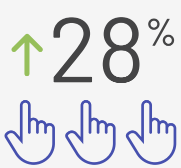
“”

Morgan J Ingram
Director of Sales Execution and Evolution, JBarrows Sales Training



Leads that are sent email messages in-between phone contact attempts have a 16% higher chance to be contacted by phone[12]

73% of salespeople using social selling as part of their sales process outperform their sales peers



SDRs that leverage a triple touch approach have a 28% higher SQL conversion rate than SDRs that just use phone and email[13]

Taking a cue from effective Sales prospecting, LinkedIn engagement, connections, and messages should also be built into your communication calendar. Although these types of leads are inbound and have already shown interest in your company's solutions vs a cold outreach campaign where a prospect may know little to nothing about your company, a Sales rep still needs to build trust with inbound prospects.[14]

The nuance of LinkedIn, however, is not just to add an InMail message to your campaign sequence. This would be the same as emailing leads, just in a second inbox. No, the nuance of LinkedIn is to engage with a prospect's content (if they are actively posting), their company's content, connect with them, reach out to them with the information they'll find valuable, and start building a little bit of relationship capital. Salespeople who mix social selling into their sales process exceeded quota 23% more often, making LinkedIn a very viable channel for inbound Sales follow-up as well as outbound.[13]

EXAMPLE FOLLOW-UP SEQUENCE

Goal: Get the lead on the phone or book a Discovery Call.

TOUCHPOINT

1-2 — Day 1

5 minute (or less) follow-up Call #1

If no answer, leave a VM and follow up with a quick Email #1

Wait 24-48 hours before reaching out again.

3-4 — Day 2

Follow-Up via Email #2

Interact with their content on LinkedIn

If still no response, wait 24-48 hours before reaching out again and reach out during a different time of day.

5 — Day 3

Call #2 - Leave VM
(can reference Email #2)

6-7 — Day 5

Call #3 - No VM

Interact with their content on LinkedIn

After about a week of follow-up and interactions on LinkedIn, then send a connection request and send a custom message.

8 — Day 7

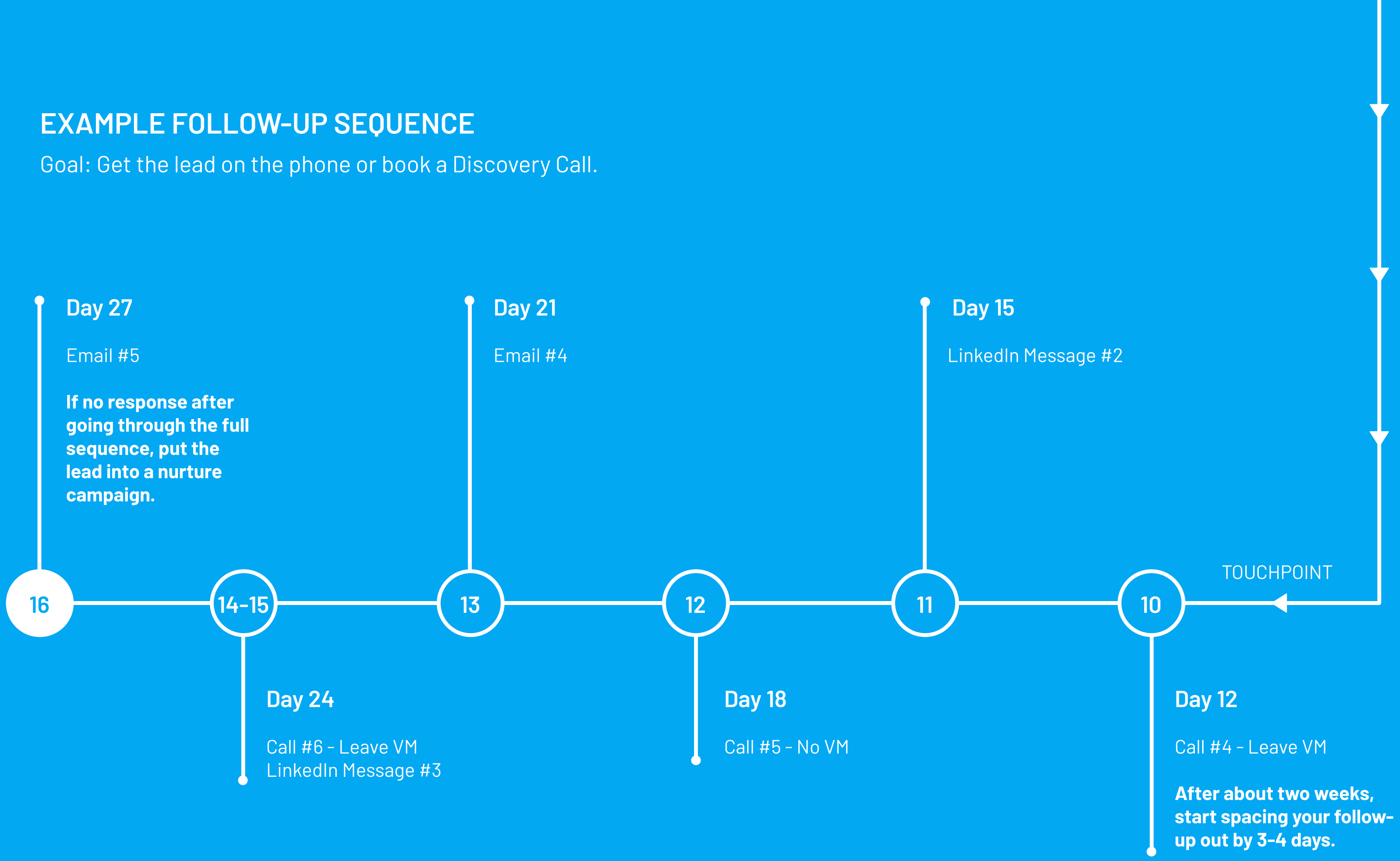
Connect on LinkedIn with a short note. Customizing the message based on previous research.

9 — Day 10

Email #3

EXAMPLE FOLLOW-UP SEQUENCE

Goal: Get the lead on the phone or book a Discovery Call.



We have multiple cadences. The one we run depends on how the lead came into our universe, such as whether it's an inbound lead, a prospect we're proactively targeting, etc. In most situations, our follow-up tends to align with the trial period that we offer.

Each step in our follow-up cadence is relevant to where the lead is within that trial period. When a trial ends, if they haven’t converted, the lead is then moved to a nurture campaign.

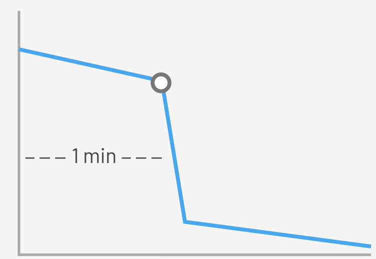
Adam Johnson
Senior VP of Sales, Active Campaign

Response Times: The #1 Way to Increase Contact Rates

> We have set the standard to get back to leads within five minutes, and that creates a delightful experience for the buyer and much better conversion rates for us. If someone is on our website and just interacted with a chatbot or filled out a demo request form, that buyer prefers to get that demo right now. That's why they've cleared the time to visit our website. They don't want someone to get back to them in three days, they want to hear from us right now, and so we try and create that immediate experience as best we can.

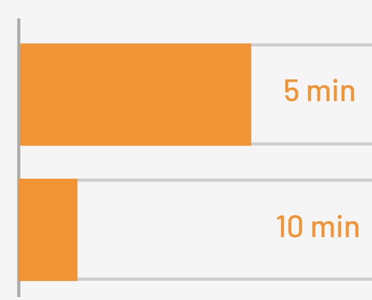
Udi Ledergor
CMO, Gong.io

What if, within the same 5 minutes or so, a lead submits a request on your website to be contacted and a second request on your competitor's website? If your competitor responds before you do, most likely the opportunity will go to them. Thirty-five to fifty percent of your sales going to the other vendor who responded first is a large amount of lost business.[3] There is no doubt that response time plays a leading role in conversions and closed deals.



Sales conversions are 391% higher when inbound leads are contacted within the same minute of requesting a demo[36].

By studying 60,000 calls, Hubspot found that calling leads within 5 minutes produced a 51% contact rate [7]



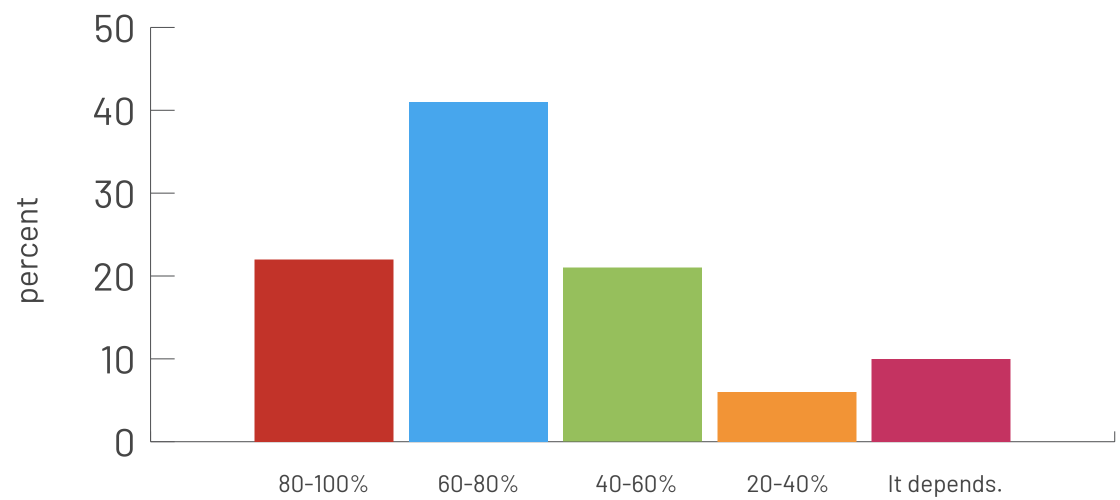
There is an 80% decrease in the odds of qualifying a lead when you respond in 10 minutes vs 5[38].

Depending on your volume of inbound leads per rep, 5-minute follow-up for every request or MQL can pose a challenge. Capacity sometimes being the biggest bottleneck in your inbound engine. The solution to fast response times, higher contact rates, and more conversions is operating on a tiered system. The phrase "not all leads are created equal" is cliche, but still true, and tiering your leads will help your team prioritize high volume. These tiers can also have a direct correlation to your average contact rate as well.

> **"The contact rate is defined as a meaningful conversation with the prospective customer that initiates a conversation leading to the qualification of an opportunity.[15]"**
>
> HubSpot

For instance, a lead who fills out a request a demo form is more likely to connect on your first follow-up attempt because they are most likely looking for an instant response. In which case, you should expect a much higher contact rate for demo requests and as such should prioritize them over leads who should first go through a nurture drip.

What do you consider a good 1st contact rate within your organization after an inbound lead is qualified as an MQL and routed to Sales?



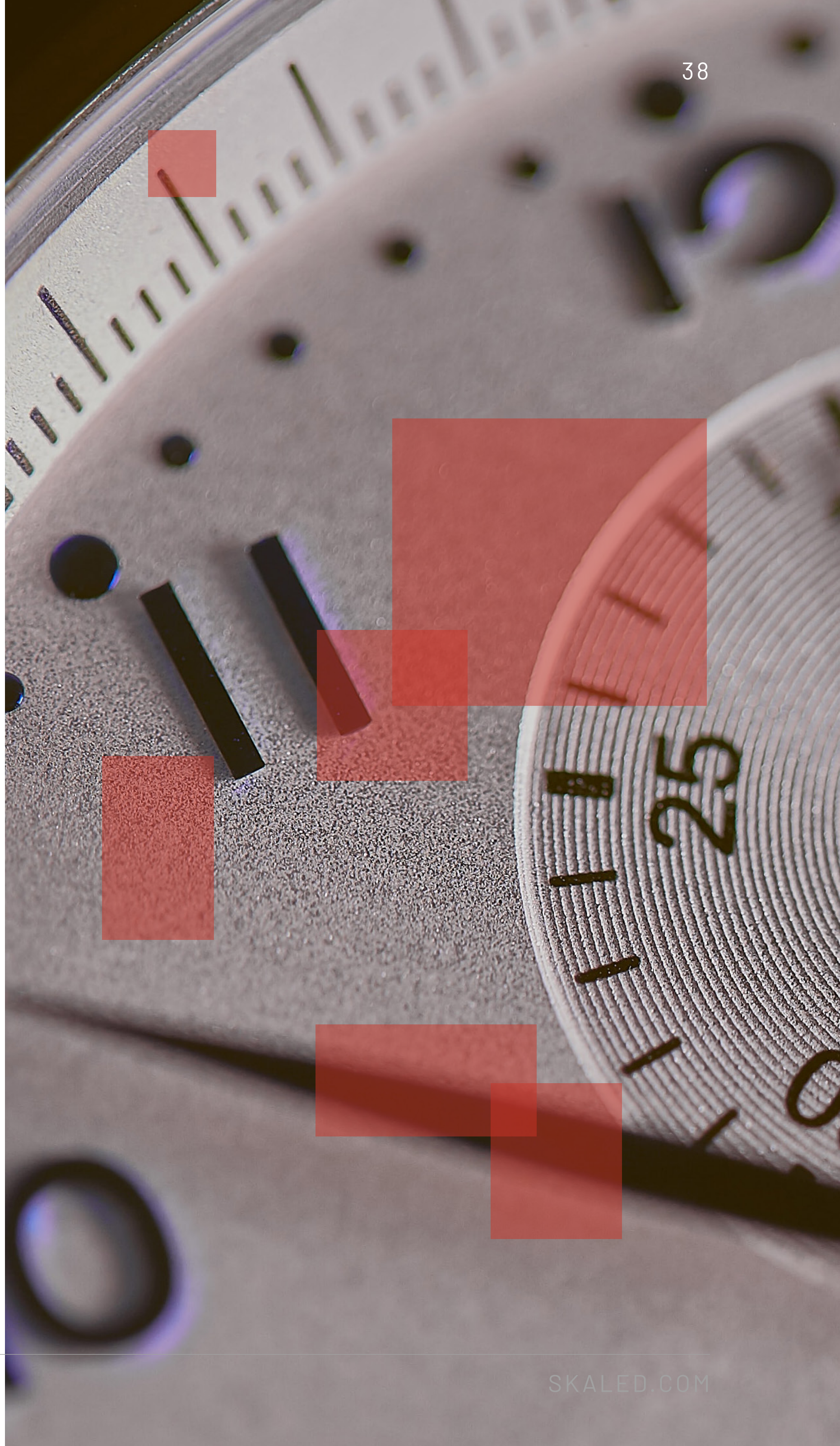
Value	Percent	Responses
80-100%	22.0%	22
60-80%	41.0%	41
40-60%	21.0%	21
20-40%	6.0%	6
It depends.	10.0%	10
		Totals: 100

Why is speed so important for demos and contact us forms? It's not because you and your competitors are literally calling at the same time and the first one to dial wins the prize. It's the experience you're creating for a buyer. If they want to be contacted now to get answers to their questions, then contacting them now is what will make them happy and it creates a positive experience with your brand.

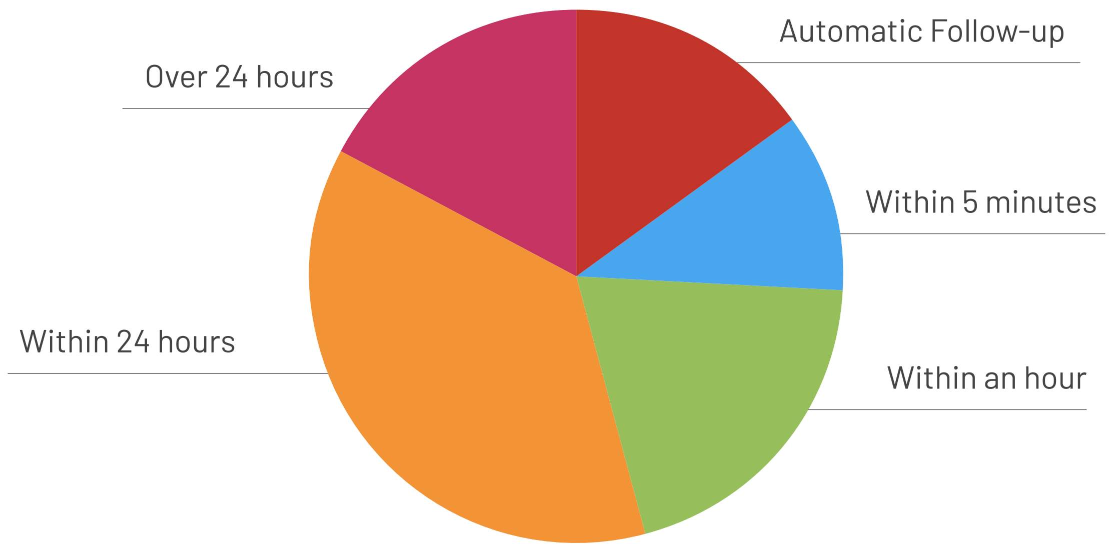
The key to tiering leads for fast, effective follow-up is tailoring your communication to a buyer's place in the buyer's journey and centering your outreach around their needs. The needs of a demo request are immediate. The needs of a warm lead who has downloaded multiple pieces of content are not as immediate. These use cases are also something that should be defined in your SLA so there is no ambiguity on who to prioritize and who to nurture.

> Once we qualify the lead, our expectation is that Sales is following up within minutes with the right information. Which our product, Outreach, allows us to do. We automate all these operations and instead of a 48 hours SLA, we follow-up within 15 minutes - drastically increasing conversion rates and ROI.

“ ” **Harmony Hickman Anderson**
Director, Demand Generation at Outreach



What is your average/required response time after a lead is qualified as an MQL?



Value	Percent	Responses
Automatic Follow-up	15.0%	15
Within 5 minutes	11.0%	11
Within an hour	20.0%	20
Within 24 hours	37.0%	37
Over 24 hours	17.0%	17
		Totals: 100

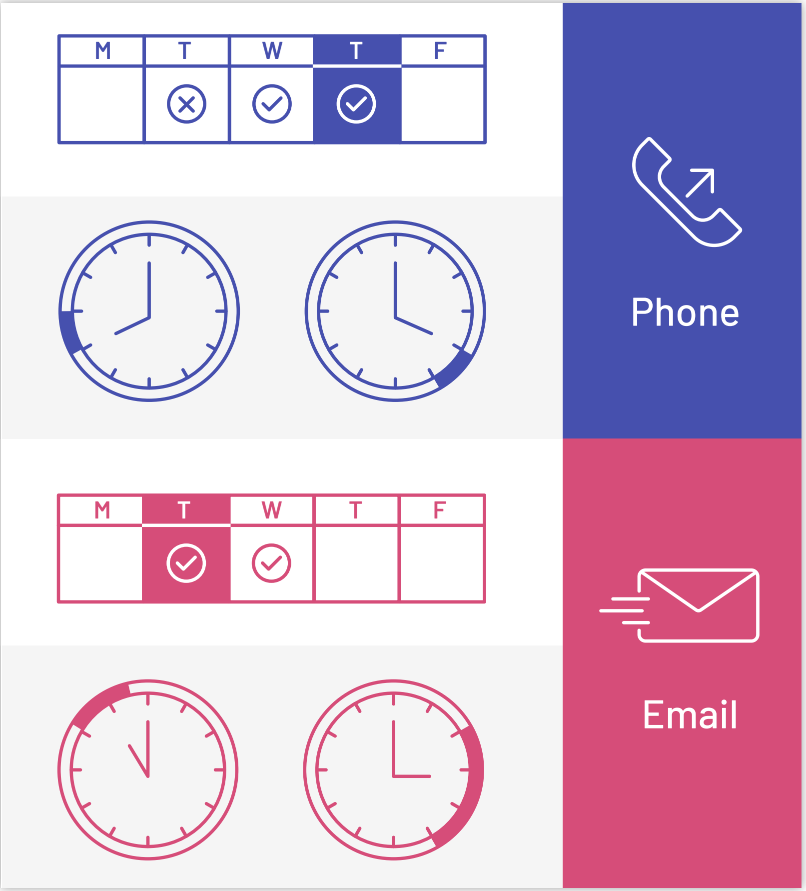
“Response Times” does not only mean speed. There have also been studies and trails to determine the best days and time of day to contact or qualify leads. No matter what day or time a lead comes in (during business hours), 5-minute follow-up is still a best practice, but when crafting your follow-up process, you’ll also want to take into account when the touchpoints in your sequence fall. If touchpoint #3 is an email that falls on a Sunday, you probably won’t have a high chance of connecting. Consider these “best” days and times when crafting your follow-up sequence but continue to A/B test and monitor your response rates.

Wednesdays and Thursdays are the best days to call and make contact with a lead. In fact, Thursday is a 49.7% better day to call than the worst day, Tuesday.[18]

Prime times to contact and qualify leads are between 8:00-9:00 AM and 4:00-5:00 PM.[21] The worst times to call are Mondays from 6 AM to noon and Fridays in the afternoon.[21]

The best days to email are Tuesday and Wednesday[21], but Tuesdays still win as the highest open rate compared to all other weekdays.[20]

The best times to email are typically in the morning between 10:00-11:30 AM[21], but between 2 PM and 5 PM also sees good activity.[19]



“”

I still see the handoff as process being executed based on limited knowledge of the buyer and it’s because of data. The process requires a broader view of what the customer is doing. And again, it's a cliche to say this, but we need a 360-degree view. If we could incorporate information around buyer behavior from other places and not just a singular point in time, and you make that available in the business rules that dictate the routing and the enablement of sales teams, I believe the handoff will be much more effective. But today, it’s based on too limited, or too narrow, a view of the world.

Nick Robinson
Digital Demand Gen Director, SAP North America

Avoiding Incomplete Lead Data

"How do you navigate working with incomplete data? How do you fill in the blanks?" When we surveyed 100+ Sales and Marketing leaders, the top 2 responses were:

26%	28%	32%
Manual research through LinkedIn	Contact database software	A mixture of LinkedIn research, contact databases, and guessing

You may be surprised by how many organizations suffer from incomplete, inaccurate, or old lead data and the cost it has on time and profit. 62% of organizations rely on marketing or prospect data that is 20-40% incomplete or inaccurate,[22] wasting 27.3% or 546 hours per year of a single full-time sales rep's time.[13]

Ideally, leads should never be qualified by Marketing and sent to Sales with missing data, but only so much information can be captured from a form. The best way to fill in the gaps is by using contact databases or data enrichment tools like ZoomInfo Powered by DiscoverOrg, Clearbit, LeadGenius, or InsideView. Aside from just filling in the blanks, lead enrichment can also have a very powerful effect on your inbound engine.

> The biggest effect of lead enrichment for Sales and Marketing is it helps with lead routing, segmentation, scoring, and maintaining the accuracy of a record while it is being worked in the CRM or marketing automation system.
>
> **Krystan Resch**
> Director of Partnerships, ZoomInfo Powered by DiscoverOrg

With a tool like ZoomInfo's Form Complete, you can even reduce your form fields and ZoomInfo will auto-populate the rest of their information into your CRM or Marketing Automation platform based on a lead's email address, giving you more information than a single form can capture and making the process easier for buyers.

"

Krystan Resch
Director of Partnerships, ZoomInfo Powered by DiscoverOrg

> You take a snippet of code provided by ZoomInfo and put it into your web form, allowing you to shorten down the number of fields that you're asking a lead or buyer to complete.
>
> Maybe you just ask for first name, last name, company name, and email. You don't need to ask for company size, phone number, or industry, or other details because the minute that form is completed, ZoomInfo immediately enriches a record from that code as it comes through the form. Whether that's a Marketo form, HubSpot, or custom developed.

If these resources aren't a part of your tech stack and integrated with your CRM, LinkedIn Sales Navigator is also another great tool to fill in contact and company data points. G2 is a great source to look at what a company sells and their top competitors. Data enrichment can sometimes only take us so far in the sales follow-up process and a human touch or investigation is also necessary to help make follow-up more personalized.

> I would look at a couple of things depending on what I am selling. First, I would check out their LinkedIn profile. If I'm selling a technical tool, I might want to look at BuiltWith to see what they're currently using in their tech stack. I would also look at G2 to see what kind of products they sell and how it's rated in the market. I would then look at Crunchbase to see how much funding they have received, and how recent was the last round. From an internal standpoint, I would look to find if we have some of their competitors as current customers and how are those customers doing on the platform? Can we leverage that in proving we have product fit in their category? You can go one step further by sharing a case study or G2 review of their competitors expressing their love for your solution.

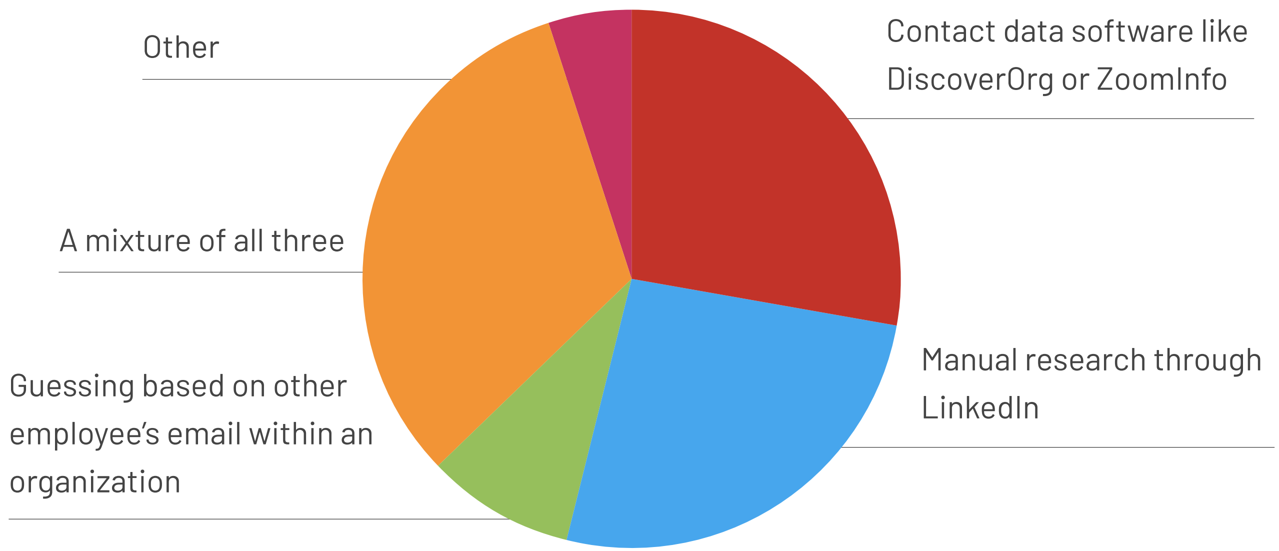
“ ”

Olivier L'Abbé
President, Metadata.io

With the amount of data software and tools (paid and free) out there, 62% of organizations relying on bad data is astounding and almost completely avoidable.

There are certain cases when a lead will enter their personal Gmail or Yahoo email address, and sometimes you will be able to find their company's information in a database based on that. However, there is an argument to be made that this lead may not have true intent but it can be very tempting to follow-up if they're in your ICP. This is a standard that must be set by your organization beforehand. Are all leads followed up with no matter what but some get higher priority? Do you put Gmails in a drip until qualified at a different time? There isn't a one-size answer. The important thing is to make sure next steps are defined to eliminate ambiguity and ensure fast follow-up of priority leads.

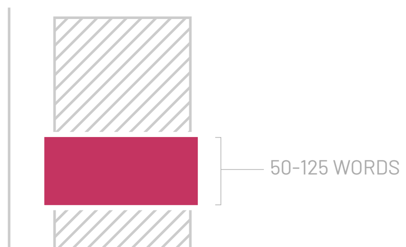
How do you navigate working with incomplete data? How do you fill in the blanks?



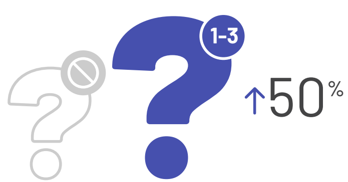
Value	Percent	Responses
Contact data software like DiscoverOrg or ZoomInfo	28.0%	28
Manual research through LinkedIn	26.0%	26
Guessing based on other employee's email within an organization	9.0%	9
A mixture of all three	32.0%	32
Other	5.0%	5

Totals: 100

Subject lines with 3-4 words have the best response rate.[23]



Keep it short. A 25-word email is roughly as effective as a 2000-word one. Best practice is between 50 and 125 words.[24]



Emails that contain 1-3 questions are 50% likelier to get replies than emails without any questions.[24]

WHAT TO SAY

It's finally complete. Your organization just did an overhaul of your Marketing to Sales handoff, documented a beautiful SLA that is sure to help your organization focus more on qualified leads, Marketing and Sales meet once a week to create a feedback loop, and your sales reps have killed their 5-minute follow-up times and implemented a stellar touchpoint calendar, ***but you're still not converting...***

What could be wrong? You've followed this *Ultimate Guide to Inbound Lead Follow-Up and Conversion* to a tee so far. But unfortunately, buttoned-up processes and quick follow-up are only half the battle. There's still a quarter of the battle dedicated to your tech stack and another quarter dedicated to what you actually say to prospects in your follow-up schedule in order to get them to discovery and Sales qualified.

Email Scripts

Your follow up emails and scripts should be specific to a trigger event or how that lead was qualified. It's important to state in your first follow-up email why you're contacting a lead and how you received their information. Recap your solution quickly and always include a clear, single CTA.

Your subject line is also the #1 reason why a prospect will open your email. As you build your perfect follow-up schedule, A/B test different subject lines to improve open rates. If you're feeling bold, and it's part of your company's brand, also test out emojis in your subject lines. A study by Experian showed that adding emojis in their subject lines increased opens by 56%.[34]

Post 1st Follow-Up Call

Recipients

Subject

Hi [Misha],

I just called to [explain your purpose].

In my voicemail, I mentioned that I'll try you again on [date and time], but feel free to reach out to me at [phone number] or shoot me an email beforehand if you have any pressing questions about [product/service].

I'm here to help.

Best,

Send

Lead Submitted Contact Us Form

Recipients

Subject

Hi [Thomas],

I got your request for more information about our [product/service]. I'd be happy to connect and talk to you more about what we can offer [Lead's Company] in terms of [solution].

Would you have time for a call on [date and time] or [date and time]?

Let me know what works best for you, or if you have any conflicts with those times. I'd be happy to work around your schedule.

Best,

Send

MQL Based on Frequency Behavior (Downloaded Multiple Pieces of Content)

Recipients

Subject

Hi [Mary],

I wanted to touch base and see if [content download] was able to answer your questions around [problem]. Have you had a chance to read through it? If you haven't implemented these solutions yet, I'd love to see what we can do to get you started.

Are you available to hop on a quick 15-minute call on [date] around [time]?

Let me know if [day of week] works or if there is another time that works better with your schedule.

Best,

Send

Follow-up to the Follow-up

Recipients

Subject

Hi [Phillip],

I know how busy you are managing a team of X and helping them [job function]. I hope the resource I sent you last week on [XYZ] was helpful. If it's easier, I'd love to walk you through it and how [Rep Company] can help you solve this common [problem] in [industry]. Here it is again (hyperlink here).

Would you have time to connect on [date and time] or [date and time]?

Best,

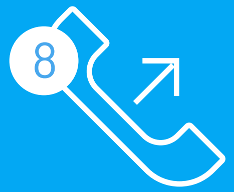
Send

↓40%

Using "Did I catch you at a bad time" makes you 40% less likely to book a meeting, while asking "How are you?" increases your likelihood of booking a meeting by 3.4X.[24]

11-14

11-14 questions total is best for a successful discovery call.[26]



In 2007 it took 3.68 cold call attempts to reach a prospect. Now it takes 8 attempts.[27]

Call/Voicemail Scipts

As stated multiple times throughout this guide, speed to first follow-up is crucial to connecting with leads. After you dial their number in 5 minutes or less, there are three scenarios that will play out on this initial call:

1. **The buyer answers and are ready to talk now.**
2. **The buyer answers but needs to set up a later date and time to talk.**
3. **A buyer doesn't answer and you need to leave a voicemail.**

Request Submitted, First Follow-Up

Hi [John],

It's [Rep Name] with [Company Name]. How's it going?

Great! I just called to follow-up on your request for [Demo/More information]. Do you have about 10 minutes to speak now?

[If yes] Awesome, I just wanted to take this time to learn more about your company goals and inquiry around [solution]...[continue with qualification].

[If no] No worries, would later this week be better for you? (Make sure to set a time before hanging up and send a calendar invite directly after.)

Request Submitted, Voicemail

Hi [John],

How's it going?

Great! I just called to [explain your purpose]. Do you have about 10 minutes to speak now?

[If yes] Awesome, I just wanted to take this time to learn more about your inquiry about [solution]...

[If no] No worries, would later this week be better for you? (Make sure to set a time and send a calendar invite directly after.)

Your script for each of these scenarios will be pretty standard. Remember to be brief, be courteous, don't apologize or ask if it's a bad time, and have as much information about the prospect available to you upon your screen.

Fun Fact:
If you smile while speaking, people can hear it in your voice.

LinkedIn Scripts

LinkedIn can be an extremely effective channel when used as more than a second inbox to reach leads. InMail messages are important as they're not as saturated as a normal inbox, but LinkedIn is so much more than just unsolicited messages. It's the social media platform businesses and professionals go to for valuable content and information. Do not message a lead on LinkedIn without first engaging with their or their company's content and without connecting with them. LinkedIn follow-up is a three-step process: **engage, connect, then message.**

96% of sales professionals use LinkedIn at least once a week and spend an average of 6 hours per week on LinkedIn.[19]

79% of salespeople achieving quota used social selling techniques.[28]

91% of executives rate LinkedIn as their first choice for professionally relevant content.[29]

Keep your call to actions in your email sequence. Don't go straight for the ask in a LinkedIn conversation without first sharing value and establishing a little bit of relationship equity.

Message, Follow-up to an Email

Hey [Joe],

I sent you an email the other day on an article we just posted on the surprising link between [relevant topic A] and [relevant topic B]. Thoughts on the article? Is this a link you've seen in your organization as well?

[insert link URL here]

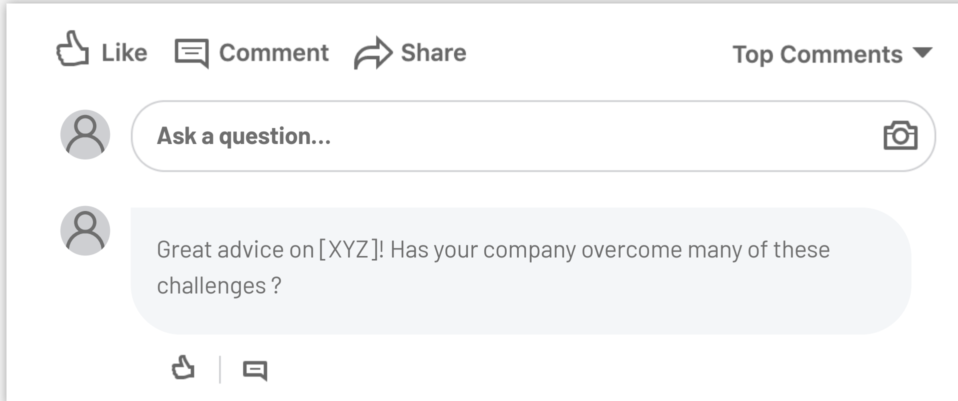
1st Message, After Engaging & Connecting

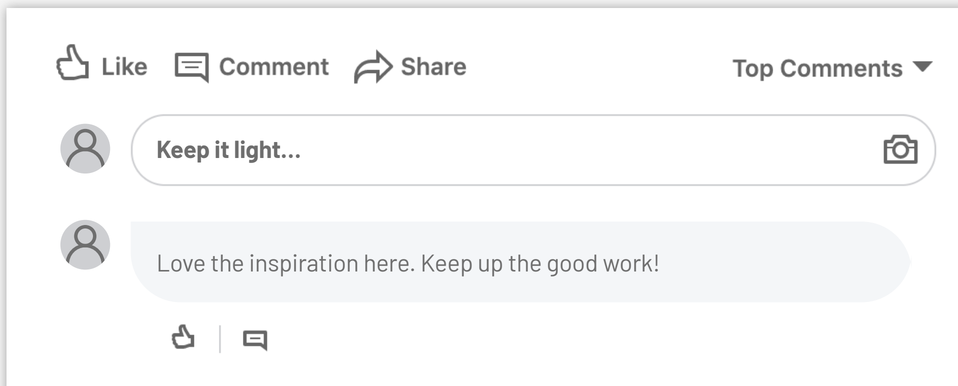
Hi [Jen],

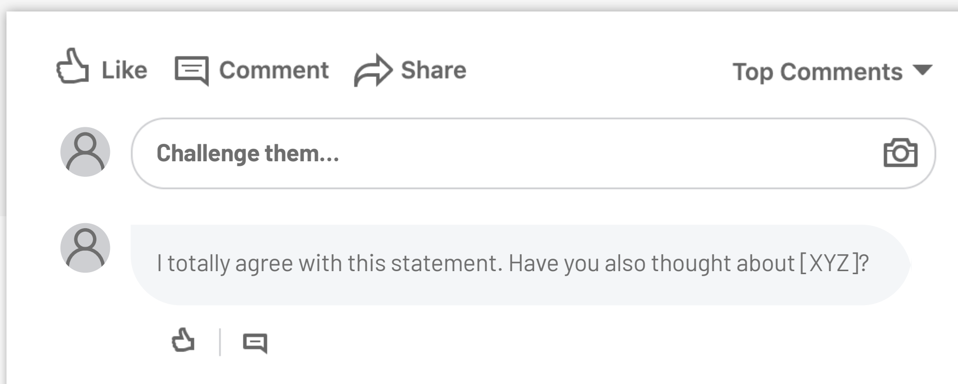
I noticed your company is posting a lot about [XYZ]. We've worked with companies like [Company and Company] who've seen results in [ZYX]. I thought I'd send you over a quick link to a resource to tell you more about it. Check it out.

[link]

Commenting on a Post





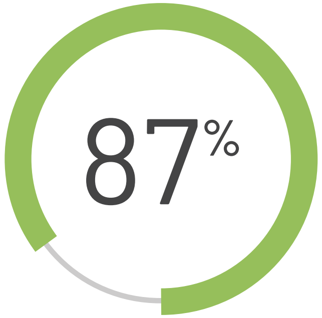


Video Follow-Up

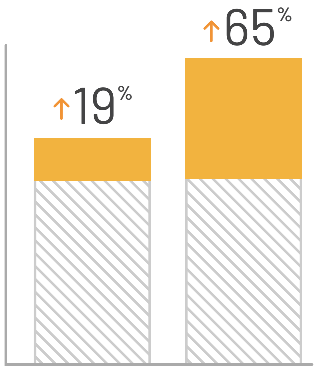
Video follow-up is also an underutilized technique in B2B sales. B2B marketers have long upped their video game to simplify complex topics and create targeted content. Sales can also use video to send a quick video follow-up through email that will help them stand out in the inbox. With the ability to easily video a screen share or take a selfie video with your smartphone, there really isn't any resource or technical limitations for Sales reps anymore.

Video communications earn 3x more responses.[37]

87% of Marketing teams use video on a regular basis.[38]



According to a report from HighQ, you can boost email open rates by 19% and click-through rates by 65% by simply adding "video" to your email subject lines.[39]



Screen sharing is great for a quick feature walkthrough when you're trying to get someone on a demo. Use it to tease the buyer and make them want the full demo. Selfies are great for introductions and putting a face to the rep who's been or about to start calling and emailing a lot. It's also great for those longer emails that buyers may not want to read, but you don't want to compromise the value you're trying to explain by shortening the copy. These are just a couple of ways to utilize video in lead follow-up. The key is to get creative and be super personalized and targeted.

The format for adding video to your emails or LinkedIn messages is also really simple:

Start with a quick 2-3 sentence intro, a thumbnail of your video with a play button icon, and the thumbnail must be clickable and link to YouTube, Vimeo, etc.

Demo Tease

Hey [John],

Just wanted to shoot you a quick video around a question our team has been getting a lot lately about our software. That is, does [Product Name] solve [Problem].

The short answer is yes. But I also wanted to show you how… (Proceed with a 60-90 sec demo.)

[Video Visual with Play Button. Image must be clickable.].

*You can also embed videos in your emails, but whether it plays or not depends on a buyer's email client (Gmail, Outlook, iOS, etc.).

Thoughts On Texting in B2B Sales

Marketing text campaigns and sales follow-up haven't had as much of a greenlight in B2B like they do in B2C. However, based on high open and response rates and the speed of texting, the medium has potential and could become as much as a game changer as using LinkedIn and video effectively if it makes sense for your buyer.[3]

98% of text messages are opened (compared to 20% of emails).[32]

95% of texts from businesses are read within 3 minutes of being sent.[30]

90s The average response time for a text message is only 90 seconds.[30]

These numbers show the potential of texting for marketing, sales, and customer experience, but they are not a verification that leads and prospects will welcome a text message from a rep they've never spoken to. The stats on B2B inbound follow-up effectiveness for text messaging have yet to really be studied and calculated on a large scale, but if you're willing to test it, there are a few best practices that have been established for texting leads. The important thing to keep in mind is texting is a very intimate medium and you must always get permission from a lead or prospect first.

7 B2B TEXTING BEST PRACTICES

1. Depending on your products or services, if it makes sense to add an "Ok to text" or opt-in feature to your online forms, do it. If a buyer tells you texting is their preferred way of communication, then you have a 98% chance of them seeing your message.

> Lead conversion requires engaging with prospects when and where they want. With a 98% open and read rate, SMS can be extremely effective in an omnichannel outreach strategy. By creating multiple avenues to engage with prospective customers, you can meet them where they prefer, providing a more personalized experience. Typically, B2B trends follow B2C and, with 89% of consumers wanting to use messaging to communicate with businesses, we see it as an increasingly valuable avenue for lead conversion.

Chris Piwinski
Product Marketing Manager, Twilio

Where we mostly see texting in follow-up today is with AEs after they've built a little bit of rapport with a prospect and have established that texting is OK. At this stage, texting can actually help push deals through faster.

Texting is more of an extra touchpoint. Nowadays in sales, you have to have an omnichannel approach. You've got to use LinkedIn, social media, phone, and email and texting is just another touchpoint.

I would say you do have to go with your sales intuition and your gut. If you don't think someone on the other end is going to be receptive to texting, don't text them. And texting is more so beneficial after you build really good rapport, and you've come to terms on next steps and a timeline. I would probably say I use texting in 90% of my sales cycles. But it's more along the lines of if they're late for a meeting, I'll shoot them a quick text. If I send a DocuSign out, I'll shoot them a text. So it's little tidbits. It's not for delivering value via text or asking for a meeting.

“ ”

Sam Glushakow
Director of Sales, ZoomInfo Powered by DiscoverOrg

2. The biggest no-no in texting is not getting permission. Just like email, texting is regulated and subject to fines if misused. Refer to the Telephone Consumer Protection Act (TCPA) for regulations. Both Twilio[45] and Zipwhip[46] have put out white papers explaining different regulations and terms.

3. Do not text prospects cold. If you don't get permission from an opt-in to text them, do not text prior to making your first contact over the phone. If you send a text to a lead or prospect before connecting with them over the phone, the likelihood of contacting that lead decreases by 39%. However, using text after your initial conversation can increase conversion rate by 100%.[31] Again, make sure to get a verbal OK first.

   "[Hey Jack], would it be okay if I texted you to follow-up? My customers tell me it's faster and more convenient to confirm our meetings or get information over text than email."

Example Texts

Form Fill:
(if permission to text)

Hi Jeff! I got your inquiry about [solution]. I'm excited to touch base. What day/time works best for you this week?

Delivered

After First Call:
(if permission to text)

Hi Jeff. Thank you for taking the time to speak with me today. I just sent you the information we talked about. Please let me know if you need anything else prior to the demo.

Delivered

Quick answer to a question:
(if permission to text)

Hey Jeff. Just wanted to let you know I checked with X and we are good to go with adding Y to the proposal. I'll send the updated version your way this evening.

Delivered

Sent proposal:
(if permission to text)

Hey Jeff. We updated the proposal this afternoon, and I've sent it over via DocuSign. Looking forward to the partnership!

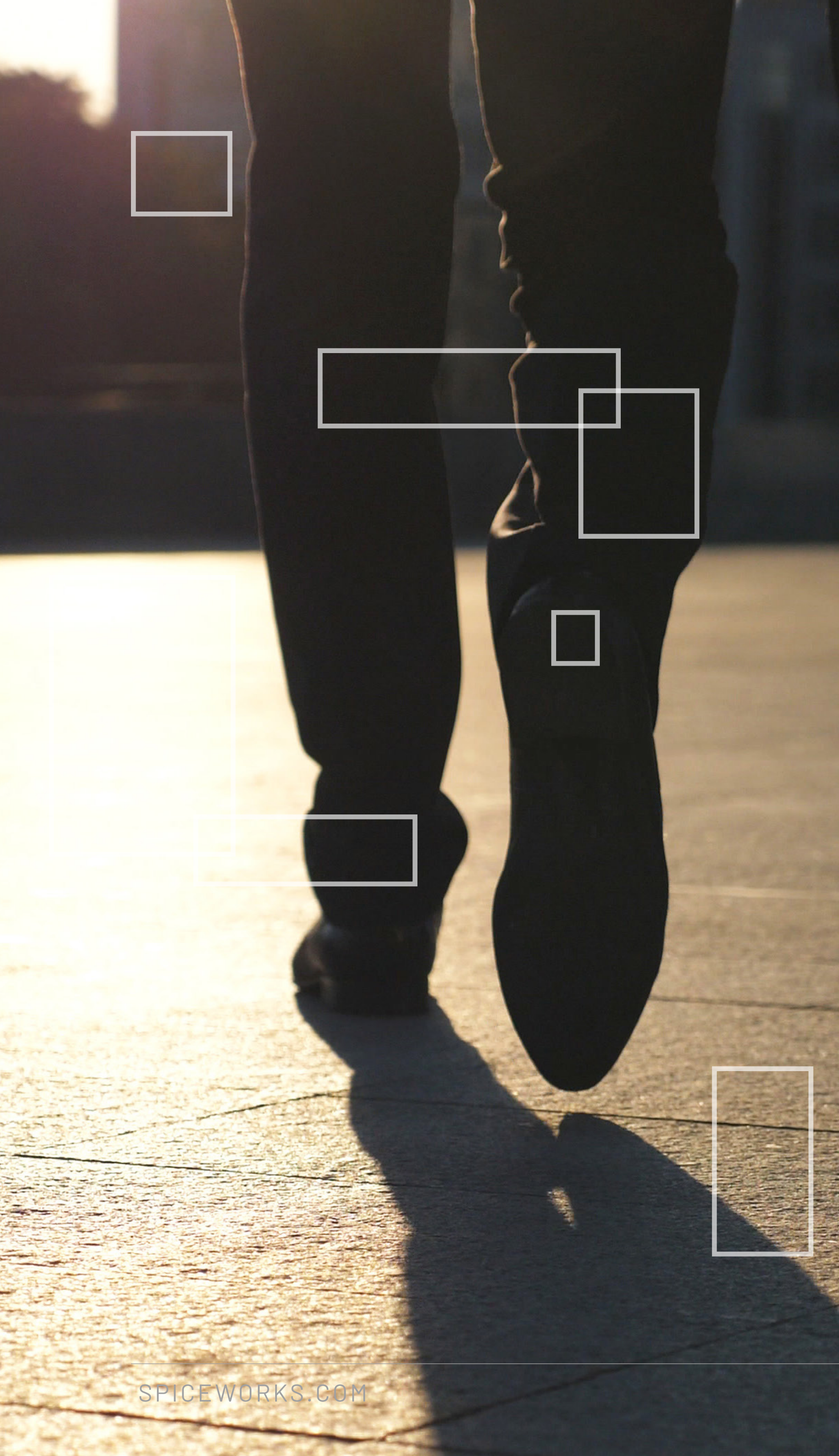
Delivered

4. Be conscious of when you are texting a lead or prospect. Keep it to 8 AM-5 PM business hours within their time zone.[44]

5. Consider your audience. Are you speaking to a company that does everything by the book and would prefer to stick to email communications? Are you speaking to a younger generation of B2B buyer? For instance, 60% of millennials prefer to communicate with businesses via text messaging and believe it's less invasive than a phone call.[41]

6. Brevity is key. It is a text message after all, and SMS texts are limited to 160 characters.[40]

7. There are also a number of solutions that provide automated text messages and workflows much like email automation that you can integrate into your sales tech stack to make texting even easier and at a larger scale. Whether it be for Marketing or Sales purposes.



Don’t be Afraid to Move On

One of the most common mistakes a sales rep will make in the follow-up process, after not following up quickly enough and giving up after the first 2-3 touchpoints, counterintuitively, is not knowing when to move on.

There are three main situations in which you should move on from a prospect and spend your energy more productively.

1. **No response (after proper follow-up)**
2. **Not the right fit (solution or budget)**
3. **Not the right time**

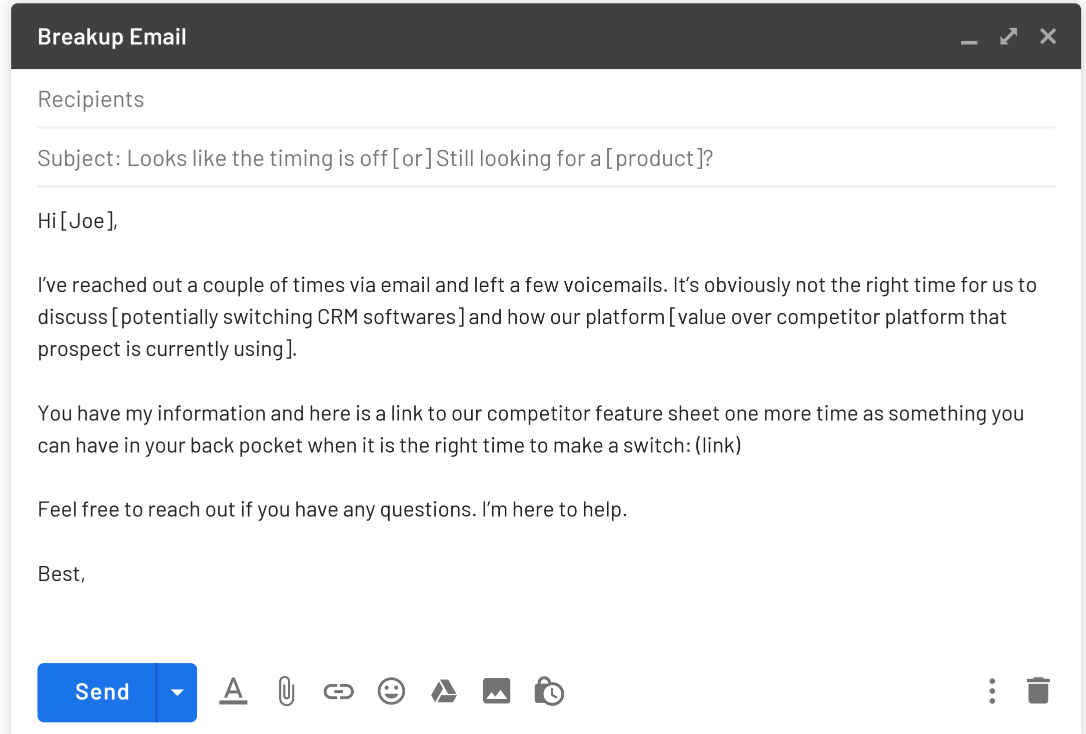
Moving on from a sale is not the same as giving up on a sale too early. “Giving up” is laziness, “moving on” is productive.

You will not be able to change the facts of one of the three situations stated above, but you can position yourself for future opportunities by leaving the door open and realizing some sales relationships aren’t about closing deals now. They could be referrals or more business down the road by building trust. Sometimes it’s just a hard no and moving on in the interest of time and resources is best for both parties.

No Response: Send a "Breakup" Email

If a prospect has gone completely through your 10 or more touchpoint sequence or has become unresponsive, then assume they're not interested, busy, or it isn't the right time. In which case, every follow-up sequence should conclude with some version of a "breakup" email as a final attempt.

Because you never really know what a prospect's reason is for not answering, it's also best to then put them through another nurture campaign after all attempts have been made. If they opt out of the campaign, then you know it wasn't meant to be.



Breakup Email

Recipients

Subject: Looks like the timing is off [or] Still looking for a [product]?

Hi [Joe],

I've reached out a couple of times via email and left a few voicemails. It's obviously not the right time for us to discuss [potentially switching CRM softwares] and how our platform [value over competitor platform that prospect is currently using].

You have my information and here is a link to our competitor feature sheet one more time as something you can have in your back pocket when it is the right time to make a switch: (link)

Feel free to reach out if you have any questions. I'm here to help.

Best,

Send

A common argument against sending a breakup email, is it's too final and can sometimes be rude. So never tell a prospect you'll stop contacting them. Opt for "It's just not the right time" or "I know you're busy" and leave the door open. Especially if you are going to put them into a nurture campaign. Breakup emails should also be tailored to the buyer's interactions with your company. Did they show intent but then never connected? Did they go through Discovery, but then you never heard back? Tailor your breakup email to these events.

Not the Right Fit: Always Be Helping

If a prospect isn't the right fit for your product or service, don't just say, "See ya later." Chances are you have an idea of the right solution for them, whether it be a direct competitor or a company that is similar to your own but caters to a different set of needs. Don't hold that information close to the vest because you don't want to help a competitor out. It's not about you, but the buyer, and sometimes an Always be Helping mentality will help you close more deals and build more relationships in the long run than Always be Closing.

For example, when talking to a prospect in January, they may be looking for a quick and simple solution to improve some internal processes so you steer them towards a different provider to suit their immediate needs. Then in October of that same year, they decide they're ready for the next step in their business plan. Who do you think will be top of mind? Sometimes not the right fit translates into not the right time. Be mindful of that, and if it really isn't a good fit, then you helped a fellow person out.

Even if you're just the qualifier and the first contact in your organization, position yourself and your company as a trusted advisor. The Always be Helping mentality is really a cross-organization adoption that can improve brand reputation among buyers.

Not the Right Time: Nurture Further

You'd be surprised how many times timing can be the deal-breaker even after a lead has traveled down the marketing and sales funnel, has been qualified by marketing, and has shown intent to purchase your solution. However, this prospect could still just be doing some early research.

A lot of the time directors or managers will ask someone on their team to start shopping solutions for an initiative that won't kick off for another two quarters. Sometimes your solution is something a lead came across organically and they're just curious.

Whatever the reason, timing still plays a part in inbound lead follow-up as much as if does in your outbound efforts.

If timing is the reason, make a note in your CRM to follow-up closer to the time a prospect said they'll want to make a decision, but don't stop there. A prospect can still be shopping during this time and choose to make a decision earlier than what you were told. This would be another scenario in which to pass them back to Marketing and put them in a nurture campaign to keep your solutions top-of-mind during the period you're not talking to them.

Driving Next Steps (Closer Handoff)

Congratulations! At this point, a buyer has made it all the way through the marketing portion of the funnel, was quickly followed up with by Sales, qualified as a good fit for both parties, and is now ready to take the next step.

Depending on how your organization is structured, an SDR, BDR, or LDR handled the initial inbound lead follow-up and is now charged with smoothly handing them off to an Account Executive (AE) on the Inside Sales team to demo or close the deal.

> **Rep:** "Ok, we talked about XYZ, and we've talked about ZYX, and here are the problem sets that you said you currently have... The next best step is talking to our expert in [Department/Service], who I think would be really good at explaining more about how we can help. Does next week sometime work for you and [Sarah] who you said would need to be a part of the final decision?"

During Discovery, a rep should have already gathered information on the buyer's goals, their problems, and who needs to be a part of the decision-making process, then reps don't need to ASK about next steps. They will be able to smoothly drive a buyer to next steps by making them feel comfortable and confident they are making the right decision to move forward and with clear guidelines of how to do so.

Expert Insights

WHAT WOULD BE YOUR TOP TIP FOR INBOUND LEAD FOLLOW-UP?

A few things actually. One is, of course, be as quick as possible, but also keep it as simple as possible. These leads or people are reaching out to you and they already have some type of understanding of what your service or product does.

Also, take advantage of the inbound. With an outbound call it's hello, pitch, one question, then let's set up a time for you to connect with my AE. With inbound, because they're expressing interest in you, I would say to use up that time as effectively as possible. Don't rush the call, ask as many questions as you need, and set that tone from the beginning. Don't abuse their time either, but try to get as much information as possible in the time you have them on the phone.

Sam Glushakow
Director of Sales, ZoomInfo
Powered by DiscoverOrg

WHAT WOULD BE YOUR TOP TIP FOR A NEW SDR ON EFFECTIVE INBOUND FOLLOW-UP?

There are a couple of things. First and foremost, I would say SDRs are extremely valuable to any business and it's especially important for new SDRs to understand that value. They have a tremendous impact on the performance of the entire business. They increase the efficiency of the Sales team and drive real revenue, even though they don't always see that early on. Even more importantly, they create a better customer experience.

Second, I would encourage them to not get too locked into a script. They have an opportunity to do meaningful Discovery and start the process of understanding the people and the businesses on the other end of the phone. I would encourage them to make sure that they understand the intent behind their scripts and cadences and not just get locked into a formula. They are an important human portion of the sales process. They should not turn that into a robotic experience for customers.

Adam Johnson
Senior VP of Sales, Active Campaign

Utilizing the Right Tech for Better Follow-Up & Higher Conversions

There are a number of instrumental tools in the Sales tech stack that help organizations be more successful. This next section will cover some of the most used tools that enable inbound lead engines to excel, features to keep in mind when looking for new tech solutions, and some top providers.

Depending on your stack, some software can do the work of two or three in one. On average, SDRs use six tools day-to-day. [33] Some of the most frequently used being a CRM, sales engagement and email automation, data enrichment, smart scheduling, phone and conversation intelligence, and webchat.

When thinking specifically about the right technology to decrease follow-up time and increase conversions, there are three key "features" that help make the sales process easier for reps and seamless for buyers: integrations between systems will make transferring more data smoother and more accurate.

Integrations between systems will make transferring data smoother and more accurate. The sharing of data and information from Marketing to Sales and vice versa has been a frequent notion and frustration in this ultimate guide. Utilizing the right technology and integrations is how your Sales and Marketing teams are going to be able to achieve this.

Marketing and Sales need that unified view of a customer. When Marketing has one perspective of what's happening and Sales has another, that isn't a good thing. Both teams need to have clarity and be on the same page with an account - who's actually in an account and what the activity looks like. Technology can provide that unified, single view of a customer. It's essential to Sales and Marketing, but first and foremost, it allows the customer to have a great experience. What we don't want is Marketing doing a set of things and then Sales doing a set of things that aren't complementary.

Heidi Bullock
CMO, Tealium

Ease of use should always be a top factor because if your teams have a hard time using a software, then you won't achieve widespread adoption, and that software essentially becomes an added expense with no ROI.

There are hundreds of platforms and tools to choose from that help propel the success of Sales and Marketing organizations, but it's up to the right people and processes to put the right technology to work for you.

An organization's infrastructure to generate, capture, and nurture high volumes of leads is built on the right tech stack with the right sophistication and workflows. However, without widespread adoption and the proper processes in place, even the best tools in the market mean nothing.

At this point, the B2B ecosystem is also about your Sales Ops and Marketing Ops team, who's running what, and having the right people understanding what the organization is trying to get to. I don't think it's any single catch-all feature in tech, but internal alignment around how we're going to use this tool and for what.

Ryan Hadfield
Director of Marketing Lead Generation
ZoomInfo Powered by DiscoverOrg

Mobility, mobile integration, or mobile-friendliness is something that is often forgotten and really underutilized in B2B more so than B2C Sales and Marketing organizations. We are in a mobile-first era and getting instant mobile alerts, being able to pull up contact data, or reply, send, update sequences from your phone app can be crucial to fast follow-up.

A great resource to help you build your stack, or rebuild your stack, is VendorNeutral. An advisor on identifying the right B2B sales tech based on company needs and goals outside of just your inbound engine.

Feature Breakdown & Top Providers

MARKETING AUTOMATION

The marketing to sales handoff can be made much smoother the more information that can be shared and the faster it can be shared. For example, lead scoring and management are mostly under Marketing's hat, but the criteria to qualify a lead as an MQL and a target audience is determined by both parties. This tool in the stack is mostly utilized by Marketing, but the more visibility we can give the left hand into what the right hand is doing, the better. Therefore, a top feature we'd call out for this tech is integrations and data transfer.

> People treat marketing automation like it's an email tool, but it's much bigger than that. It's a platform for engagement. And so what is engagement? Engagement is interactions across sales, marketing, and customer success and support. How does that platform ingest all that and help you better segment communications and offers to customers based on all those touchpoints? That requires integration.

Nick Robinson
Digital Demand Gen Director,
SAP North America

Our survey of 100 Sales and Marketing leaders said these are the top five features they look for in a Marketing Automation platform.

01 CRM Integration

02 Email Marketing

03 Lead Management

04 Reporting/Analytics

05 Website Tracking

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Think of your CRM as your data warehouse. It just isn't possible to manage high volumes of leads in different stages of the cycle, communicate effectively, stay on top of notes and tasks, and have accurate reporting without one. You can also think of it as the middleman between Marketing's marketing automation software and Sales' sales engagement software and pretty much any other tool in your stack.

A CRM is pretty much standard for every organization nowadays, but that doesn't mean it's being used to its full potential for effective lead follow-up and tracking deals. One thing that is really underutilized in this data warehouse is the accumulation of conversations with leads and prospects and automatic capture of these activities. A buyer may speak to an SDR, AE, and Product or communicate via email, call, and text. Your CRM should be able to track all of this so buyers don't have to repeat themselves.

We want to help companies be the sort of company that their customers want them to be. And that means selling the way your customers want to be sold to and marketing to them the way they want to be marketed to. That's what our software does and that's also how we operate internally.

For example, it's really important to us that even though you've talked to an SDR first and then you talk to a salesperson, you don't have to repeat yourself. That really annoys us and we know it annoys our prospects. Nobody likes to repeat themselves. That's why it's important to have those phone calls and those emails recorded and in front of the salesperson, so they don't need to ask the same questions. They can have all the context from the first conversation.

Ryan Nichols
VP Product and Marketing, Zendesk Sell

Our survey of 100 Sales and Marketing leaders said these are the top five features they look for in a CRM.

- **01** Reporting/ Analytics
- **02** Email Integration
- **03** Contact Management
- **04** Lead Management
- **05** Forecasting

SALES ENGAGEMENT PLATFORM

Your sales engagement platform is what is going to help you automate your follow-up schedule and remove repetitive and tedious tasks. A qualified lead from Marketing may route through your CRM, but then your sales engagement platform steps in to help you keep prospects on your follow-up schedule.

A sales engagement platform is also one of the techs in your stack that can essentially be a two or three in one technology that has voice dialing, SMS, and social features.

Top Sales Engagement Providers

- Outreach
- SalesLoft
- groove
- HIGHSPOT
- Yesware
- Mixmax
- HubSpot
- Reply
- XANT
- CLEARSLIDE

**Sources: G2 Best Sales Engagement Software & TrustRadius Best Sales Engagement Platforms (SEPs)*

SALES DIALERS & CONVERSATION INTELLIGENCE

Aside from reps just actually calling a lead that comes down the pipeline from their personal phones, there are software and apps that can make teams more efficient by tracking, reporting, routing, and recording calls that can feed data into your CRM.

Or, more and more CRMs and Sales Engagement platforms are adding call capabilities, call tracking, and call recording as a native feature like Hubspot and Salesloft reducing the need for another tool.

Softwares like Gong.io and Chorus.ai take call tracking and recording ten steps further with conversation intelligence by monitoring customer interactions (call, video, and email) with what Sales is saying and analyzing what worked and what didn't from these conversations.

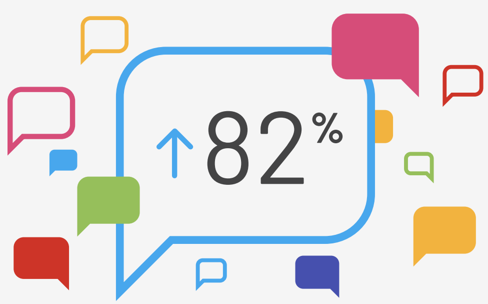
Top Dialers & Conversation Intelligence Providers

- Five9
- NICE · inContact
- talkdesk
- GENESYS moments connected
- PhoneBurner
- Gong — Conversation Intelligence
- CHORUS — Conversation Intelligence
- ringDNA — Conversation Intelligence
- CallRail — Conversation Intelligence
- EXECVISION — Conversation Intelligence

**Sources: G2 Best Conversation Intelligence Software & G2 Best Auto Dialer Software*

CHATBOTS, LIVE CHAT, CONVERSATIONAL MARKETING SOFTWARE

There is no doubt chatbots and real-time sales should be a part of your inbound sales strategy, especially if you have a high-volume of website visitors. Chatbots and live chat is really another channel that Sales and Marketing can use to not only capture leads but further qualify them and route them to the right people. As far as being used for fast, effective follow-up, Sales can use chat to book meetings in seconds, circumventing longer follow-up cadences, or connect in real-time if a key prospect or account has come back to the website that they've been trying to connect with.



On average, Intercom found that website visitors who chat are 82% more likely to convert to a customer and pay 13% more than those who don't.[35]

By utilizing chatbots, Sales not only can connect to promising leads in seconds, but bots can be used to answer general qualification questions and set up meetings automatically for Sales and instantly for the buyer - reducing tedious tasks on the sales-end and providing a better buyer experience.

> Chatbots are enabling our sales team to be more efficient while maintaining a positive customer experience. We're using them to handle the upfront, repetitive parts of the sales process, from engaging website visitors to booking meetings.[43]

“” *Intercom on Sales*

Using a combination of both live chat and bots on your website is a best practice for this type of tool for booking more meetings with leads. Conversations are 5X more likely to convert when a human jumps in, however, bots are great for first qualifying the need for Sales to jump in. [42]

The beauty of live chat and chatbots is since you can engage in a conversation and ask/respond to questions, you're more likely to gather the information you need to help you qualify a lead upfront, and the buyer is willing to take the time to have an interactive conversation with a bot or person over filling out your 10 field form.

All of this information should also be integrated into your marketing automation system or CRM. Say a buyer converted on an ebook and two weeks later they visit your website. Chats can greet that buyer by name, and record back into your CRM that they then chatted with the bot and was routed to an SDR who booked a meeting.

Jared Fuller
Sr. Director, Partnerships, Drift

And yet, with all these possibilities of utilizing chatbots and live chat on a website, the B2B world just hasn't caught up to the needs of B2B buyers who prefer real-time messaging.

15% Drift found that only 15% of B2B companies are utilizing chatbots[1]

So we asked Jared Fuller with Drift, why he thinks only 15% of B2B companies have adopted chat.

I think it's due to people and companies having this jaded perception of chatbots in a B2C support scenario versus chatbots in a B2B marketing scenario.

It can be much more helpful if you're just trying to book a meeting, book a demo, or get that question answered about pricing or to talk with someone now because you need help and you're the right type buyer. What a chatbot can do is get you in touch with someone now or schedule the meeting immediately. We just have to set up workflows that route people to the right place and the right person.

Jared Fuller
Sr. Director, Partnerships, Drift

**Sources G2 Best Conversational Marketing Software & G2 Best Live Chat Software*

Top Dialers & Conversation Intelligence Providers

1. Drift
2. Intercom
3. Zendesk Chat
4. Podium
5. Zoho SalesIQ
6. Verloop.
7. Exceed.ai
8. Freshdesk
9. LiveChat
10. FreshChat

Key Takeaways

Top 3 Common Mistakes in Sales Follow-Up

1. NOT HAVING A DEFINITIVE SLA THAT ALIGNS SALES AND MARKETING

SLAs should align the goals of Sales and Marketing and put them on the same hook. That is, not only should the SLA hold them accountable to each other, but to a unified goal - revenue. An SLA not only documents the responsibilities of Sales and Marketing but also clearly defines the alignment of the two teams. See Conscientious Alignment: Building Your Handoff Process for a breakdown of what your SLA should include.

> If you want to make sure Marketing and Sales are working really, really well together, there are four key principles. The first being clarity around the process. So if we're talking SLAs or a handoff from Marketing to Sales, whether it's an inbound lead or even if the team is going outbound, do people know the process? Is it clear? Is it documented? That's principle number one.

“” **Heidi Bullock**
CMO, Tealium

2. DEVELOPING A FOLLOW-UP SCHEDULE AND NOT CONTINUALLY TESTING

Build a follow-up schedule and test it. This ultimate guide is a fantastic place to start in building your schedule, but depending on your buyer, the optimal number of touchpoints and even communication channels can vary. Build your schedule, build your messaging, but always be testing and adjusting to fit what works best for your buyer and be flexible with new techniques and technologies such as bots and texts.

3. GIVING UP TOO EARLY/NOT KNOWING WHEN TO MOVE ON

Inbound lead follow-up is a balancing act. The average salesperson only reaches out to prospects twice before giving up. But there is a reason why organizations bake 7+ touchpoints into follow-up sequences. Even inbound leads need a bit more convincing and nurturing.

Then there is the other side of the scale and knowing when a lead is a lost cause or not the right fit. Building a follow-up schedule and qualification guideline is what helps keeps sells as productive as possible by setting a standard at which they should operate and teaching them how to move on from a lead that will probably never close to a buyer that will.

Top 3 Tips for Effective Sales Follow-up

If you only take a few things away from this ultimate guide, it should be these three tips. From working with 100s of clients, secondary research, and speaking to 15+ Sales and Marketing gurus, these are the top pieces of advice we've given, read, and heard the most for effective follow-up and higher conversions.

1. TEAM STAND-UPS AND FEEDBACK LOOPS

Buyers are already 70% of the way through the marketing and sales funnel before their first contact with a sales rep. By aligning Sales and Marketing your organization ensures two things:

1. Marketing is leading the right buyers and companies down the funnel to sales reps and sets a process in place that tells Sales the exact right time to follow-up.
2. Sales spends their time speaking and working prospects that are more likely to convert into sales.

Alignment is only achieved through constant communication and feedback loops.

> If you as a CMO don't know how your CRO takes her coffee, you're doing it wrong. It means you're not close enough. You should be having coffee at least once a week, so you should know by now how she takes her coffee and you should be discussing any ongoing issues and nip them in the bud before they get out of hand.

“ ” **Udi Ledergor**
CMO, Gong.io

One of the biggest complaints from Sales about Marketing is that leads aren't quality. Well, what does "quality" really mean? It means the right ICP and the right contact within that ICP. Having weekly meetings with Marketing to discuss why a lead wasn't or was not qualified so they can adjust campaigns and generate more "quality" leads.

> Getting executive alignment with the Head of Sales and Marketing is crucial for the long term success of the company. That said, alignment in different departments such as customer success, demand generation, content creation, product marketing, is just as important! Having alignment ensures that issues can be ironed out quickly and efficiently.

“ ” **Olivier L'Abbé**
President, Metadata.io

2. SPEED

Contact rate decreases by 10X after the first five minutes. 35-50% of sales go to the venue who responds first. Calling back within a minute instead of waiting an hour can result in an 89% increase in first qualification in a study by Hubspot.[7] It's a wonder with stats like these that speed is a top tip for effective follow-up. As soon as a lead is ready to be contacted, so must sales be.

> In highly competitive markets where sales cycles can be short, speed of response is critical because buyers are sometimes in the market for minutes, hours, or days - not weeks or months. If you don't quickly respond and engage a prospect, they'll move on to someone else.

Ethan Zoubek
CRO, Campaign Monitor

3. OMNICHANNEL "EXPERIENCE"

Reps that leverage a triple touch approach have a 28% higher SQL conversion rate than reps that just use phone or email.

Email, calls, LinkedIn, and even text (if applicable) should be built into your follow-up schedule. Every buyer is different, and you'll have higher contact and qualification rates if you communicate with buyers through the medium they find the easiest. Any experience that saves a buyer time and makes the process easier for them is the best experience. An omnichannel approach allows buyers to tell Sales what their preferred method of communication is; ultimately, providing a better buyer experience.

Inbound Follow-Up Checklist

- ☐ Follow-up within 5 minutes once a lead is determined marketing qualified.
- ☐ If no answer, leave a voice message and then enter the lead into your follow-up sequence.
- ☐ On average, the optimal number of touchpoints for conversions in an inbound follow-up sequence is 7-10.
- ☐ The first 2 days of follow-up require a higher concentration of touches. About 4-5 across mediums.
- ☐ Your follow-up sequence should include email, call, and LinkedIn touches spaced 24-48 hours apart the first half of your sequence and then 3-4 days apart after about two weeks of no reply.
- ☐ Switch up the days and times you try to connect with a prospect throughout your follow-up sequence.
- ☐ Don't forget that LinkedIn is not just another inbox, first engage, connect, then message.
- ☐ Augment and enrich lead and contact data as much as possible through solutions like Clearbit, DiscoverOrg, LinkedIn Sales Navigator, etc.
- ☐ Use your prospect's preferred communication channel.
- ☐ Try adding simple videos to your follow-up sequence. In a couple of weeks, you'll know if video increases or decreases your contact rate. Our bet is it will increase.
- ☐ Text messaging can be powerful a tool in your follow-up process but always get permission.
- ☐ Always be testing your follow-up schedule and messaging. Move around touchpoints, add/subtracts days in between emails and calls. A/B test subject lines. Do your buyers appreciate more professionalism or a bit of humor? Dare you try an emoji?
- ☐ Don't be afraid to move on.
- ☐ Pull monthly reports to continuously optimize your follow-up process and create a feedback loop with Marketing on the quality of leads.

About Spiceworks/ ZIFF Davis B2B

Spiceworks/Ziff Davis B2B is the trusted global marketplace for connecting technology buyers and sellers across all marketing channels. We provide the valued information IT and business decision makers need to research, buy, and manage technology while delivering the intelligence and insights technology brands need to create and sell better products and services. By combining the breadth of depth of the Spiceworks community with expert content, trusted 1st party data and proven lead generation capabilities, Spiceworks/Ziff Davis B2B is uniquely positioned to help technology buyers and sellers to grow their businesses.

About Skaled

Skaled is a B2B sales consultancy focused on helping organizations and the people that work there reach their full potential. Today's buyers demand value-driven interactions. Skaled supports an organization's need to meet these demands using our unique approach that combines modern sales strategy, intentional digital presence, and quality execution. Our proven methodology is designed to accelerate sales impact, helping organizations achieve measurable and sustainable results.

Shoutouts to Our Voices in the Industry:

We wanted to give a few shoutouts to some amazing Sales and Marketing leaders propelling their organizations forward with innovation and grit. Sales and marketing is an ever-changing game that can make our work extremely difficult but also extremely impactful.

1. Shout out to Verrion Wright, Director or Marketing, Contently
2. Shout out to Morgan J Ingram, Director of Sales Execution and Evolution, JBarrows Sales Training
3. Shout out to Harmony Hickman Anderson, Director, Demand Generation at Outreach
4. Shout out to Nick Robinson, Digital Demand Gen Director, SAP North America
5. Shout out to Felipe Engelhardt de Carvalho, Director of Customer Operations, Pipefy
6. Shout out to Ryan Nichols, VP Product and Marketing, Zendesk Sell
7. Shout out to Krystan Resch, Director of Partnerships, ZoomInfo Powered by DiscoverOrg
8. Shout out to Chaz Knauft, Senior Manager of Sales Development, ZoomInfo Powered by DiscoverOrg
9. Shout out to Ryan Hadfield, Director of Marketing | Lead Generation, ZoomInfo Powered by DiscoverOrg
10. Shout out to Olivier L'Abbé, President, Metadata.io

11. Shout out to Ethan Zoubek, CRO, Campaign Monitor
12. Shout out to Sam Glushakow, Director of Sales, ZoomInfo Powered by DiscoverOrg
13. Shout out to Udi Ledergor, CMO, Gong.io
14. Shout out to Heidi Bullock, CMO, Tealium
15. Shout out to Jared Fuller, Sr. Director, Partnerships, Drift
16. Shout out to Adam Johnson, Senior VP of Sales, Active Campaign
17. Shout out to Chris Piwinski, Product Marketing Manager, Twilio

Survey Criteria

The Ultimate Guide to Inbound Lead Follow-Up & Conversion survey consisted of 100 respondents meeting specific demographic and firmographic criteria.

Company Size	500+				
Market	B2B				
Department	Sales (57%)	Marketing (43%)			
Team Size	10-19 (21%)	20-46 (34%)	50+ (45%)		
Job Title	Top Level Executive (19%)	Senior Vice President (7%)	Vice President (23%)	Director (30%)	Manager (21%)

The Ultimate Guide to Inbound Lead Follow-Up & Conversion survey consisted of 100 respondents meeting specific demographic and firmographic criteria.

If you'd like a copy of the full survey results, please contact Skaled at [marketing@skaled.com.](mailto:marketing@skaled.com)

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