

01

Cold Calls

Best Practices

Workshop

02

Emails

Best Practices

Workshop

SECTION 01

.....
Cold Calls

What Makes an Effective Cold Call?

Research

Before picking up the phone, do research (internal database and external sources) to make sure you understand who you will be speaking with.

Goal Identification

Understand the goal of the cold call -- to engage, generate interest and qualify the person/organization.

Be Prepared

Be prepared to concisely explain why you are calling. Preempt FAQs and common objections.

Cold Calling

Be persistent - cold call effectiveness doesn't start until the 4th to 5th touchpoint and it peaks at the 9th touchpoint.

Gatekeepers are valuable sources of information.

- You can find out about the contact's schedule and organizational structure.
- They can point you to more relevant contact.
- Make them feel valued!

Tone & pitch

What is the Impact?

What does the tone of your voice convey? Does it reflect confidence? Friendliness? Boredom? Immaturity?

Are you speaking too fast? Too slow?

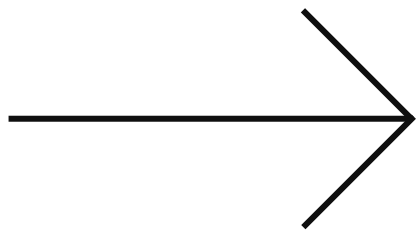
Vary your pitch and inflection to create more energy

Many studies have shown that we perceive people with lower-pitched voices to be more competent and trustworthy

Best practice

Listen to you own calls so you can adjust on all factors listed here.

Core Components

**01**

Introduction

02

Confirm Role

03

Confirm Need

04Giving Value or
Potential Fit**05**Ask - Referral or
Meeting

Sample Call

Introduction + confirm role

“Hi Rob, this is Katie with New York Jets I saw after talking to a few people they suggested that we should set up a quick conversation

No pause - I was forwarded to you by way of <Referral if you have> - they said that anything business growth or for your revenue targets this year that you were the right connection?

Sample Call

Confirm need

“Ok great - we work with many Sales and Success Leaders who face challenges around retaining clients and more importantly, helping the client accounts grow year over year.

Is new client retention and growth a key focus this year?

Giving value + asking for the meeting

Sample Call

“Yes, we know this is an issue for many leaders in Customer Success and it sounds like you might be seeing this at [Company name] as well.

Why don't we set up a 10 minute call to chat in more detail? That way, I can share how other [job titles] are partnering with [Company] to build their [potential you bring]. Hold on one second...let me pull up my calendar...How does DATE and TIME look on your end?

Sounds good, looking forward to our call.”

Cold Calling

Persona, persona, persona.

Treat the call as an opportunity for education.

Use location, industry, and competitors.

Be brief and don't oversell.

Confirm there is a need and secure the meeting or ask for a referral.

SECTION 02



Emails

The essential
part of a successful
outbound sales
effort.

Strong Outbound Messaging

Messaging should be personalized when time permits, consistently relevant, and have a call to action in each note.

Messaging cadences (rate and form of outreach) should be tailored to the industry and buyer persona.

Email Structure

Subject line

On average, email open rates are between 20% and 30%

Having a subject line means relaying your key message even if the reader doesn't open the email

Use descriptive subject lines or clear call to action

Opening

The preheader appears next to the subject line in most email clients, generated from the first line of text in your email

Frame the messaging around the prospect's position

Include messaging that is relevant to the prospect

Add personalization where possible

Body

Keep this short and simple

What is the value proposition for the prospect?

What is a quick value add piece of information you can share?

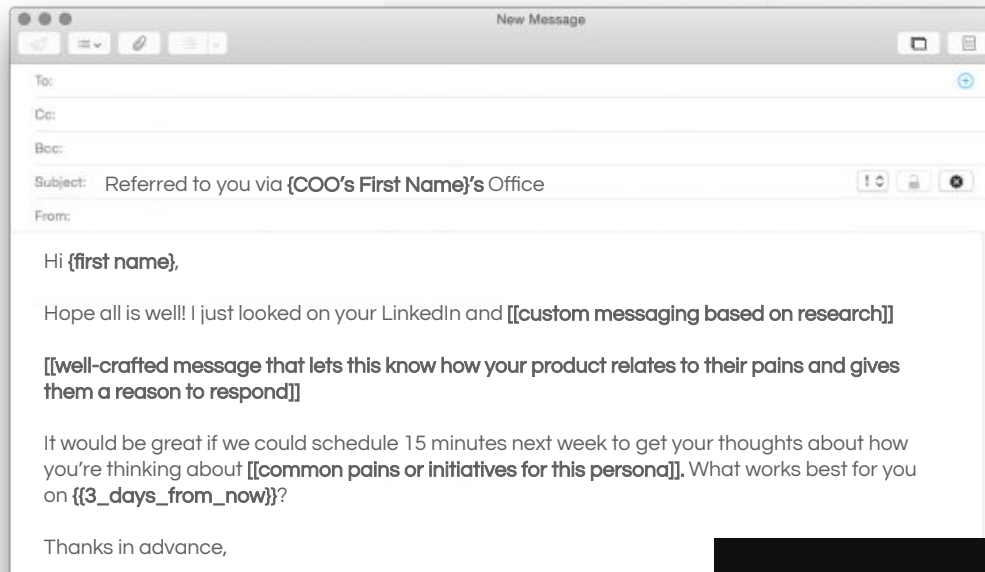
Call to action

End the email with a call to action

Ask to schedule a quick 8 minute conversation on a specific date and time

Bulk Example

Great subject,
great
message



Open : 61%

Reply: 26%

Opening: establish credibility

Option A

Discuss why you are reaching out to them in particular because....

- They are a specific title in a type of company that should care because (Industry/functional trend).
- They showed some interest.
- You were referred by one of their peers.

Option B

Demonstrate industry expertise, or the results of your work with their competitors.

In working with [insert industry], they mentioned [relevant point]:

- When researching (industry/topic), we found (relevant statistic) and thought it would be interesting to share.
- Relevant articles.

2nd paragraph: outline the pain

Option A

Discuss their pain points and challenges. Ex:
As the *(title)*, I'm sure you are well aware of
(relevant pain points).

Option B

Discuss threatening industry trends. Ex: We've
seen a lot of *(relevant titles)* struggle to
(achieve / overcome XYZ) given *(industry
trend)*, so there is a growing need for
(challenges Ultimate solves for).

Email

- Understand who you are reaching out to
- Target more than one person in the company
- Create credibility – reference relevant industry clients
- Add value - highlight their specific pain and give a solution
- Only share relevant content to who you're emailing
- Show proof that you've done research and understand their role and organization

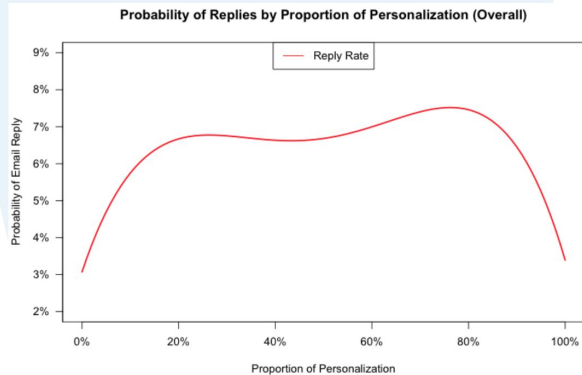
It really matters

Personalization

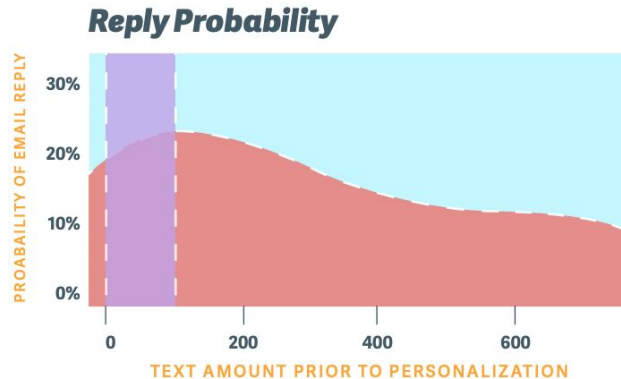
Increase response rate 2-3x in 5min

Personalizing the first 20% of your email results in 2x response rates, but ROI decreases if you spend more than 5 minutes personalizing

Always include personalization early on and leave the remaining 80% templated



Sales email probability of replies proportion of personalization



Personalization and Customization Tips

X factors they care about that are relevant to your product

Example:

I noticed that your company had a few reviews on Glassdoor mentioning a desire for more social outings for the team.

Use statistics that are relevant to them

Example:

Inc.com recently published a study around the importance of getting teams out of the office together...

Relevant information on their LinkedIn or company news

Example:

I saw on LinkedIn that we're from the same 5,000-person hometown - love it. Did you go to the Diner on Rt. 9 as much I did in High School?

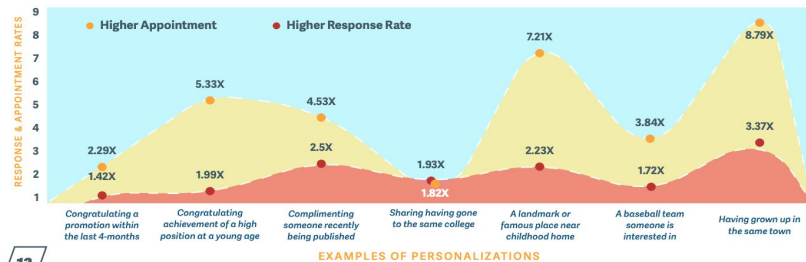
Things to Consider

Sentiments

Using the word “congrats” in-reference to a personal achievement increases reply rates 2x and appointments by an avg. of 4x

Use LinkedIn steps to expedite this research step

Person-Specific Personalizations



12

Bias towards informal

Use 1 to 4 word subject lines

Do:

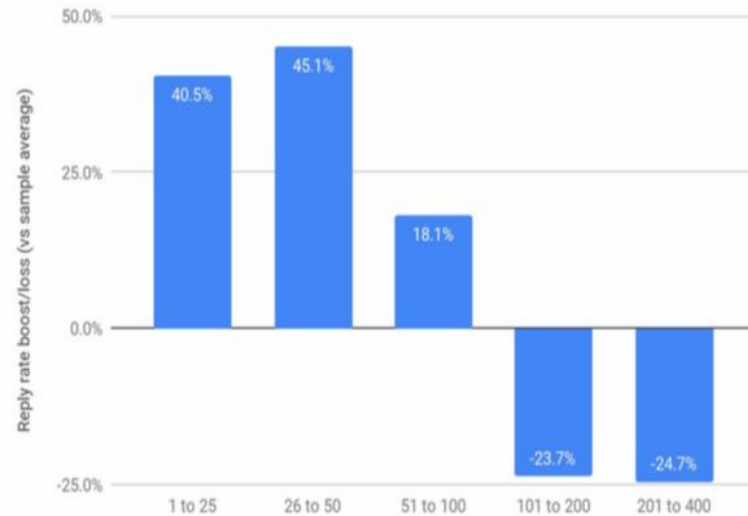
- Keep it mobile-friendly
- Emails with under 100 words are more effective Writing with an elementary vernacular is 95% more effective
- Be clear + direct

Don't:

- Use bullets
- Include multiple links
- Use more than 2 images
- Include a p.s.

Sign-Offs:

- "Best" is the most effective
- While "thank you" is least effective



Source: SalesLoft

It All Starts with Messaging

86%

of the value propositions
salespeople present aren't
relevant enough to get the
customer to take action."

– *CSO Insights*

*Frame your messaging
thoughtfully.*

*Keep it simple, limit the
choices and the call to action
(CTA).*

*Sell to the individual → then
the employee → then the
company.*

Let's recap

Frame your messaging thoughtfully - start by empathizing with the persona.

Keep it simple, limit the choices and call to action (CTA).

Sell to the individual, then the employee, then the company.