cognism

The no stone unturned guide to sales stratergy

Contents

Introduction: why you need a sales strategy

The world of **B2B sales** has changed.

Gone are the days of the charismatic salesperson armed only with a copy of the phone book and a telephone. Over the last 10 years, improvements in internet speeds and technology have sparked a revolution in sales. Contact data can be sourced at the click of a button; today's sales tools aren't physical objects, but exist in the cloud.

This sea change in sales has made the job both easier and harder. Easier, in that there's now a whole host of tools that make sales faster and more efficient. Harder, in that it can be difficult to know how to navigate this new landscape. What tactics are the ones that really work? What metrics are the ones that really matter? What tools are the ones that really help?

This is why you need a **sales strategy.** There are so many ways for you to sell and so many paths to follow. Here at Cognism, we've tested several different approaches and we believe we've arrived at a strategy that really, truly works. And now we're going to share it with you.

Here's what you can expect to learn over the course of this guide:

- How to set, meet and exceed sales goals.
- How to build and maintain a strong sales pipeline.
- Practical cold calling tips, including scripts, templates and cadences.
- Advice for structuring and training a winning outbound team.
- A rundown of the metrics and tools to power your strategy.
- Key takeaways from some of the brightest minds in B2B SaaS sales.

This is **The No Stone Unturned Guide to Sales Strategy** – presented by **Cognism**, the world's best B2B prospecting solution.

Part 1: Sales process

The secret formula for setting B2B sales goals

Sales is a demanding, fast-paced industry - but have you ever stopped to ask yourself: what's my goal?

For most B2B **SaaS sales** leaders, the answer to that question is simple: to achieve consistent revenue growth. Constant, predictable growth is the holy grail of SaaS - and here at Cognism, we believe we've unlocked the secret!

Our growth trajectory is rightly the stuff of SaaS legend - from 657% growth in 2018 to 180% in 2019. But what's behind the numbers? What's our system, our process? What helped us to build a sales strategy that delivers outstanding success year-on-year?

This is how we built a formidable sales engine at Cognism - in 5 key steps.

Step 1 - Start with revenue

If revenue is your ultimate goal, then make it the number one benchmark that you measure everything else against. Everything you do in B2B SaaS sales must relate back to revenue. If there's something you're doing that isn't helping you hit your revenue target, drop it.

This top-down sales approach shows you where you should be focusing your energies. When you've worked out your revenue target, you can then work out which activities will help you achieve that target.

Typically, these will be:

Outbound sales
When salespeople engage with decision-makers inside a company to generate interest and make a sale.

Inbound marketing
When a marketing team generates opportunities for the sales team to action.

Upsells
The process of selling more to your existing customer base.

Every revenue-generating activity you engage in must be tracked by underlying metrics. These include:

Capacity/budget
How much do you expect these activities to cost?

Conversion rate
How well is each activity performing in terms of converting leads into customers?

Cost per lead
How much does each conversion cost?

These are the top-level sales metrics that you need to track. In the next step, it's time to get more granular.

Step 2 - Calculate the maths of outbound

The old-school view of **outbound sales** is that it was an art - you had salespeople who engaged with leads and, through sheer force of personality, persuaded them to buy.

This approach just doesn't cut it in the 21st century. Today's SaaS companies have transformed outbound sales into a science. You can calculate exactly how many sales reps you'll need to hit your revenue target - and this is the secret formula.

- Let's say you have 1 outbound sales rep. He or she is making 200 dials every day.
- Those 200 dials lead to 60 conversations and 15 follow-ups. It's important to note follow-ups, as they typically have higher conversion rates than a first-time cold call - the lead is already "warmed up" and aware of your product/service.
- Those 60 conversations and 15 follow-ups lead to 20 product demos.
- Those 20 demos lead to 10 opportunities, and finally, 3 deals being signed.

From this calculation, you can work out…

- **The number of deals** that you'll need to be signed every month in order to make revenue.
- **The number of salespeople** that you need to generate the opportunities that lead to those deals.
- **The average cost per deal,** which will you help you in terms of allocating resources.

The next step is to put all this together in a practical, repeatable way.

Step 3 – Follow the capacity model for B2B sales

The capacity model is how you take the ideas from Steps 1–3 and build them into a scalable, repeatable sales process. This is the system that Cognism follows. Here's how it works:

- As with Step 1, start with revenue. What's your target?
- Then work backwards. What resources do you need to reach that target?
- Your monthly revenue target will indicate how many SDRs you need to book X number of meetings.
- From that, you can extrapolate how many meetings will lead to a demo, how many demos will lead to opportunity, and how many opportunities will convert into a customer.

This is the science of predictable B2B sales. Below, you'll see a table showing the capacity model in action at Cognism, from H1 2019.

Revenue Target	SDR	SDR Target P/W	Monthly MTGS	Marketing Meetings	Total Meetings	Meetings Attended	MTGS>> Opp	Opps Created	Deal won conversion rate	Deals won	Numbers of AEs	Meetings per AE per week	Meetings per AE per Month	SDR Ration BDM	
January	£32,000	7.5	45	180	54	234	175.5	55%	97	25%	32	5	12	47	0.63
February	£36,000	11.6	70	233	116	349	262	55%	144	25%	36	6	14.75	59	0.79
March	£44,000	14.2	85	284	142	427	320	55%	176	25%	44	7	15.25	61	0.93
April	£44,000	14.2	85	284	142	427	320	55%	176	25%	44	7	15.25	61	0.93
May	£44,000	14.2	85	284	142	427	320	55%	176	25%	44	7	15.25	61	0.93
June	£48,000	15.5	93	310	155	465	349	55%	192	25%	48	7	14.75	61	1.05

I recommend this model wholeheartedly if you're a scaling B2B SaaS company. It allows you to accurately predict revenue and successfully manage resources month-on-month.

Step 4 – Improve sales efficiency

When your **B2B lead generation** machine is up and running, your next task is to keep that machine well oiled. There are a number of things you can do as a sales leader to improve the efficiency of your team.

Here are my top tips:

Identify your ideal customers

Create an **Ideal Customer Profile (ICP)** for your business. This is a representation of the perfect buyer for your product/service. Once you've defined your ICP, use it to find decision-makers who exactly match that persona.

Align sales and marketing

Your B2B sales rocketship will never get off the ground if your sales and marketing teams are at loggerheads. They must work together symbiotically, with marketing attracting and nurturing high-quality leads for sales to action.

The number one thing you can do to drive alignment is to put both departments under the same umbrella. Instead of looking at them as 2 separate teams, view them as all 1 team - the revenue team!

Nurture your leads effectively

Within that, it's important that your B2B marketing operation is strong. Use every tool in the marketing toolkit to **nurture your leads** until they're ready to buy.

Start a blog, publish quality content aimed at your ideal buyers, run paid ads and launch email marketing campaigns. Keep that pipeline full of warm leads!

Measure your results weekly

Select your metrics and track them on a weekly basis. Measure everything to the smallest detail - number of dials, conversion rates, demos attended...the list goes on!

By tracking everything weekly, you'll be able to quickly spot errors in your sales process and fix them.

Invest in the best B2B sales tech

There are a plethora of tools that can aid your sales team in their **B2B prospecting quest.** A word of advice, though - don't implement tech for the sake of it. When looking at providers, always ask yourself: what problem is this going to solve for my team? If it's not resolving an issue, don't buy it.

Step 5 - Don't forget your people

All this talk of processes, tech and **B2B data** can lead us to forget the most important element of all: your people!

Sales is still a people process. Tech and data can help, but it's people that drive the engine. Make sure you don't lose sight of your team when setting your sales goals.

Hiring the right SDRs is one critical element; providing them with clear progression opportunities and world-class training are others. If you can get the right salespeople, give them everything they need to succeed, and incentivise them to achieve their very best, then you'll find that your sales operation will run like clockwork.

Key takeaways

That's my rundown of setting B2B sales goals and building a sales engine that succeeds. These are the 5 key points to remember:

1. Make revenue your number one goal and structure every sales activity around that.

2. Create a sales model that drives growth. The capacity model will help you to plan the resources you need.

3. Break down the sales process and apply metrics to track in all areas.

4. Use tech to improve the process and accelerate your sales.

5. Hire well and construct a sales culture that encourages success. Invest some time in aligning sales and marketing.

The 8 stages of the B2B sales process

A B2B sales process is a set of steps designed to help salespeople convert prospects into customers. **Jonathan Ilett**, Sales Director, explores the Cognism sales process.

cognism

Here at Cognism, our 8-step sales process is the cornerstone of our sales strategy. It's helped us to stay focused and hit our revenue targets, even during the challenging working environment of COVID-19.

These are my thoughts on the B2B sales process, how it works and why having one is so necessary for a scaling company.

Why you should develop a B2B sales process

Most salespeople enjoy the freedom that comes with their role. The ability to bring their personality into every **cold call** and adapt to changing conversations.

However, the best salespeople aren't artists, they're scientists. They use data to form insights and create a strong sales process.

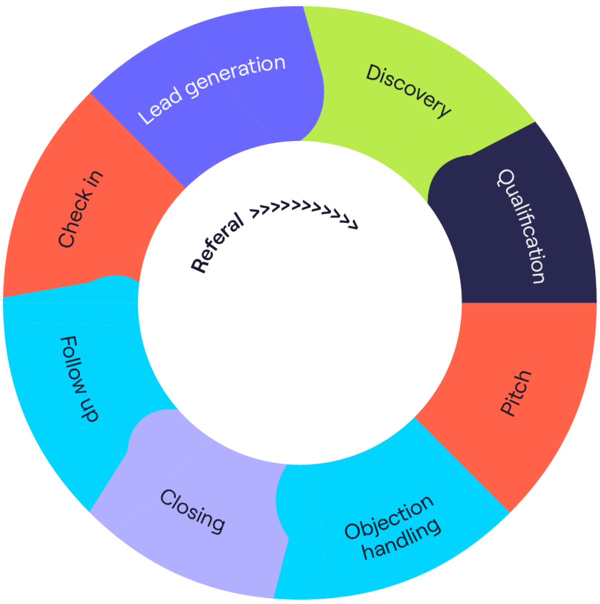
A sales process provides a framework upon which a salesperson can improvise, while providing four additional benefits:

- Having a more rigid process in place makes it easier for new starters to get up to date.
- Breaking a sales strategy into stages makes it easier to identify aspects which aren't working, and adjust them.
- Having a more structured sales approach will make it impossible to overlook important steps.
- Seeing where customers are in the sales process makes it easier to forecast more accurately.

The B2B sales process explained

The first thing to do before you start prospecting is to research your target market and define your **Total Addressable Market** (TAM). Once you've done this, you will be ready to kickstart the sales process.

We've broken our one into 8 separate stages, which are outlined in the infographic below. This is the exact process we follow at Cognism.



1st stage - Lead generation

Lead generation is the process of finding sales qualified leads; people who've expressed interest in your product and who you should reach out to! If you have a good understanding of your TAM and the right lead generation software in place, this step should take no time at all!

These are the top 3 lead generation tactics in B2B sales:

Cold calling
Contacting leads via the phone, qualifying them and then arranging a meeting.

Outbound email
Contacting leads via email, containing compelling and personalised content.

Social selling
Engaging with leads on social networks - in B2B, the main one is LinkedIn.

2nd stage - Discovery

Every good salesperson should know their product inside out. Every great salesperson should also understand their prospect's business. By putting in the groundwork and trying to understand the prospect's pain points before you speak with them, you'll be able to provide them with solutions. This research stage is called **discovery**.

Researching the prospect also gives you an opportunity to qualify the lead before you pick up the phone. Here are some tips:

Connect with the prospect on LinkedIn
Check their recent activity. What have they commented on? What have they shared? Have they written any articles or been featured in someone else's? Insights like these can be great for building rapport on your cold calls.

Click on their company's website
Have they published any news stories or press releases recently? Scroll through their blog, if they have one. Take note of the language/terms that are used by the company. Again, this is all good information that you can use in your calls.

Read up on the latest news in their sector
Subscribe to industry news websites or LinkedIn groups. When you call the prospect, you want to sound like an expert - not just in your field, but in theirs!

3rd stage - Qualification

Now that you've done the groundwork, it's time to get on the phone.

During the first section of your sales call, you should be assessing the prospect's suitability as a customer.

Ask them open-ended questions, focus on their problems and determine whether you could solve them. If not - don't force it! Time is of the essence, and if you have a good lead list, you'll have plenty of other people to speak to.

4th stage - Pitch

You should by this point have a good idea of the struggles the prospect faces. If so, you'll be able to deliver a pitch which is tailored to solving their problems.

This is where your creativity comes in. The most detailed sales process in the world can't replace charisma or charm...this is why we often avoid detailed scripts.

A good sales pitch should last around 30 seconds. During this time, you'll need to show the prospect that you've done your research. Hit on key points of value which are relevant to them. Here are some tips:

- Quote the types of businesses that the prospect's company prospects to - this is a great way to demonstrate that you've done your research!
- Arouse curiosity in the prospect. Avoid over-explaining your product or service; you want the prospect to follow up with some questions.
- A sales pitch isn't an excuse to list all of your wonderful features. Prospects don't want to hear it! Focus instead on how your product can help them. What results can they expect to see if they become a user?

5th stage - Objection handling

A prospect will rarely be ready to buy immediately after your pitch. They'll most likely have some questions which you'll need to answer.

When it comes to **objection handling**, the prospect is never wrong. If you flat-out disagree with a prospect's objection, they'll hang up. Instead, listen to what they have to say, and reposition your offer in a way which answers their question. The chances are they've just not heard the right information yet.

Over time, you'll develop an arsenal of objection resolutions. Until then, just listen to the objection, acknowledge it, and propose a reasonable solution. If this goes well, it'll be time to close the deal.

6th stage - Closing

This stage of the B2B sales process should be the most exciting part for the prospect. You've demonstrated the value of your product, handled all of their objections, and convinced the prospect that your solution is an investment which can't be passed up on!

Discuss prices and negotiate if necessary. Offering some free added value to the deal can help get it over the line.

Also, be sure to discuss all of the remaining steps before the call ends, including speaking about all of the stakeholders that need to sign off on the deal. This will ensure that there are no surprising bumps along the way; now the signed contract will be in sight!

7th stage - Follow up

After the sales call, send the prospect a follow-up email. Due to the number of people that are usually involved in signing a B2B purchase, it's important that you leave a good impression!

Keep it professional and provide next steps. Include a summary or (even better!) a recording of your conversation, as well as any additional useful information. Leaving the conversation on a positive note will leave the door open for repeat sells and upsells.

Plus, if you're going to continue working with the new client, you'll be getting your new working relationship off to a great start.

8th stage - Check in

Congratulations! The prospect has become the client. There's just one step left.

After you've waited for the client to see the value of your product, it's worth reaching out to them one last time. Check in with them to see how they're doing.

Not only can you gain great feedback from this step, but if they've been enjoying the product, you can ask for a case study or referral. This will give you a great new lead to restart the B2B sales process with!

How to speed up the B2B sales cycle

Justin Stephenson, sales expert and Partner at **Sandler Training,** explains the steps you can take to shorten the B2B sales cycle and land more deals, faster.

Sandler Training

How do you shorten your sales cycle?

Adding fewer steps...?

Nope.

Decreasing the time between steps...?

Wrong again.

A shorter sales cycle is the holy grail of B2B sales. Almost impossible to find - but doing so could grant your business an eternal life cycle (or something pretty close).

Here are my thoughts on the sales cycle and how you can shorten it.

What is the B2B sales cycle?

In basic terms, a broken down B2B sales cycle is a set of steps that leads a salesperson through a sale. It's part of your sales strategy and should be repeatable, optimisable and easy to keep track of.

The purpose of breaking down your B2B sales cycle is to make things easier and more efficient. If it's making things too complicated, redesign it.

4 steps for speeding up the B2B sales cycle

I spend a lot of time helping businesses understand their current sales cycle. It's often the case that companies have a natural way of handling sales, without really knowing what it is.

There are 4 steps that can help you here. They are:

1 - Have a robust sales system

When you're dealing with a smaller business, it's often the case that they have no solid sales system in place. This astounds me. Quite often they'll have some sort of system in place, but it's too loose and won't ensure repeatability or reliability. It needs to be nailed down.

This will make it much easier for the salesperson to dictate the flow of a sale.
The salesperson needs to keep control.

2 - Control the sales journey

I recommend trying to build a sales methodology that helps the salesperson to control and manage the sale. If they're unable to do this, they'll default to 'the buyer system', where the buyer dictates the process. This can be less helpful for both parties, and is particularly common when cold calling.

When a sales process is in place, the salesperson is less likely to miss important steps. This means they are more likely to attain all of the key information they need.

3 - Qualify leads thoroughly

Certain information needs to be gathered so the salesperson and prospect can decide if there is a good reason to buy the product (or service for SaaS sales).

A lot of SMEs will be so keen to get in front of a buyer, they'll hang in for as long as possible without finding a reason not to work with them. This can result in a late breakdown and wasted time.

Developing a better understanding of the sales cycle will make it easier to identify strengths and weaknesses. Fixing these is the key to shortening the entire process.

4 - Measure your results

A sales strategy should be stuck to firmly. Breaking it down into manageable chunks makes it easier for companies to gather data on each step, see where sales are getting stuck, and fix it. This process of measuring and refining will ultimately lead to a much shorter sales cycle.

Why is it important to break the B2B sales process down?

I've identified 3 key reasons:

Scaling

If you always know where you are in the sales process, you'll know how to manage it and become more effective and efficient. This helps a company to scale.

Predictable forecasting

If you're adhering to a tight process, you should have a better idea of the direction a relationship is moving in and the likely outcome. This means you can forecast more accurately.

Common language

It's crucial for a team to have an identity. You don't want mini-systems within a team. Having everyone following the same process makes it easier for sales leaders to measure, track and review performance - and implement any necessary changes.

How can you break the B2B sales cycle down effectively?

Technology, technology, technology!

And a little bit of elbow grease.

I recommend using a tool like **Gong** or **Refract**. These are going to help you analyse your team's conversations. They also make it easier to share wins and improvement points with sales leaders and team members.

One of the key reasons for breaking down the sales process is because you can increase the focus on certain steps. So use them as the pillars for your strategy. Here are 5 of the main steps you need to focus on:

Pain point identification

This is a must when making a sale. If you can't get to the root of their pain, they'll stay in a rational state. This makes a sale much harder. Work on building a highly tuned questioning strategy. It's a case of seeing what works well and doubling down on it. If you've got reliable B2B data you should be able to predict the pain points of your audience.

Willing and able

You need to find out if the prospect is capable of buying your product or service. If you wait until the end to discuss the cost - you could end up losing valuable time. This causes long sales cycles which might not convert. The best proposal is one which the prospect doesn't have to look at. They already know what they're signing up for.

Understand their process

Knowledge is power! You need to understand who is involved on their side, why are they deciding to buy, what are their logistical requirements. Ask these questions, and try to help the prospect close the deal. At this stage, you're working with them.

Fulfilment

Affirm everything that has been agreed upon. I prefer calling this fulfilment rather than closing, because if you've managed the previous stages effectively, the deal should already be closed. It's just a case of sorting out the paperwork.

Post-sell

Help to manage buyers remorse. Some buyers will have problems when signing. They might have to cut off a relationship with a previous provider or have a difficult internal conversation. Until the money is in the bank, this responsibility sits with the salesperson.

Key takeaways

"Sales is nothing more than effective communication. Whether you're in a hard negotiation or early stages, it's all about building trust and rapport. If you can't do this, you'll struggle. So many business owners have incredible technical knowledge of their product and they are fantastic advocates of it - which does help. You still need to understand the nuances of effective communication in the sales process. That's what sales is all about."

How to build a B2B sales pipeline in zero time

Having a robust sales pipeline is crucial to closing deals and generating revenue. **Jonathan Ilett** returns to show you how to build pipeline in zero time.

cognism

No matter the size of your business, your style of selling, what you're selling, or who you're selling to, there's one thing that all B2B salespeople have in common - the need for a robust sales pipeline.

Why do you need a B2B sales pipeline?

Quite simply, most B2B leads are not ready to close immediately and must be filtered through a pipeline - a stable and reliable sales cycle that helps you meet your end goal of closing deals and generating revenue.

How can you build a sales pipeline quickly?

There are many ways to go about building a sales pipeline and many different steps to follow. These can vary based on your organisation's needs and your timeline.

For most SaaS sales companies, revenue growth is the name of the game - and the goal is achieved by building a pipeline quickly.

Here's how you can do it.

1 - Identify your ideal customer

Who are you looking to sell to? You need to clearly identify the best customers for your product/service, and then focus all of your sales, marketing and advertising efforts on this customer. This process of identification is known as your Ideal Customer Profile, or ICP.

The best way to determine your ideal customer is to:

Define your product from your ideal customer's POV
What does it do for them? What problems does it solve?
How is it improving their life?

Think of your ideal customer's demographic
What industry are they in? Where do they work?
Where do they spend their time online?

Pinpoint when your customer is buying your product
Does it peak seasonally? Is it a monthly purchase?

Understand your ideal customer's buying strategy
How are they making the purchase decision? Have they bought similar products in the past? Is it one decision-maker driving the sale or is there a buying committee involved?

2 - Research your leads

The best way to show your prospects that you've taken the time to understand who they are, and that you recognise their needs, is to research them.

If you're speaking to the wrong person about the wrong thing, you're wasting everyone's time - especially yours! Time counts in B2B sales. Make sure you understand what the client needs and who the decision-maker is by conducting thorough research.

3 - Prospect effectively

"Salespeople focused on new business who exceed quota perform 52% more people searches each month. Smart searching can generate more qualified leads." - LinkedIn

LinkedIn

Aside from motivation, there's one thing that your **outbound sales** team needs every day...more prospects!

Prospecting is fundamental to the success of a business. Your salespeople must utilise a multi-touch approach to make more sales. A multi-touch strategy is the best approach, when well executed and managed effectively.

There are many methods to leverage for prospecting but the best picks are cold calling, email and social selling on LinkedIn (the number one social network for B2B).

4 - Become an industry thought leader

"By sharing your knowledge and values through digital content, you can showcase your experience, build relationships, and stand out from the crowd." - **Kelly O'Bryan da Mota, Forbes**

Forbes

You're not going to become an influencer on LinkedIn like you would on Instagram, but it's a great place to connect with people in your industry and get noticed.

Why? LinkedIn is a B2B platform, meaning you get to connect with businesses and the people who run them, directly. To become an industry thought leader on LinkedIn, you need to share your own content, and engage with the content that your prospects or others in your field are putting out there.

But how do you do it? I'll explain in the next step!

5 - Build your own personal brand

Your pathway to becoming an industry thought leader, and have prospects come to you, is to build a personal brand on LinkedIn.

Start off by contributing something of value to your target market. Create engaging content, post about trending topics in your industry, and post regularly.

Remember Step 2! Conduct some research to identify the types of content that resonate with your ideal customer.

Who are the top thought leaders in your sector? What types of posts do they share and which ones get the most likes, comments or shares? Copy their LinkedIn sales strategy but make it your own.

A great way to ensure you're putting out compelling content is to align with your marketing team. Ask them to help with content creation, whether that be blog writing, video marketing or publishing long-form eBooks.

Leverage LinkedIn further by sharing other people's content that's relevant and useful to your audience. Join popular LinkedIn groups, connect with prospects and nurture them over time.

6 - Test everything

This is my favourite part. A/B testing, also known as split testing, is an essential part of conversion optimisation.

In A/B testing, you have the original version of the content you want to use and a variant. The test shows you what's working and what to do more of, as well as what's not working and what to avoid.

In B2B sales, A/B testing works with trying different cold calling scripts and varying your email and LinkedIn InMail copy. Once sent to your prospects, you should track the results (measured against the number of conversions) over a number of weeks or months.

Then, take a step back. Study the data and see which script or template performs better. Now you'll know which approaches you need to focus your energies on.

At Cognism, we've made A/B testing a central component of our sales team's daily routine. The insights you gain from it drive improvement across the team.

Sales pipeline management 101

Ben Mouquet, Head of Sales at **Mailtastic**, brings you his tips for navigating the sales pipeline.

You can fill me up, but I can't be held.

I am valuable, but cannot be sold.

What am I...?

A sales pipeline!

Sometimes it can be hard to visualise and manage this intangible aspect of B2B sales, but learning to do so is the key to unlocking your sales potential. To make this easier, I've broken the pipeline down into 5 stages:

1. Prospecting

2. Qualification

3. Meeting

4. Consideration and decision

5. Closing

To move a prospect through these stages effectively, a salesperson needs a few things: a varied set of techniques, organisational skills and the flexibility to adapt on the fly.

Here are my tips and tricks for navigating each step of the B2B sales pipeline.

1 - Prospecting

Having worked at a few companies of different sizes, including Red Bull, Cognism and Mailtastic, I've realised that your approach to prospecting depends on the position of your company.

A smaller company, such as Mailtastic, might not have a clear picture of their TAM or ICP. It's an evolving process. You start broad, looking at all marketers for example, and then use your results to refine your ICP.

Technology can help with this stage. My go-to's are: **Outreach**, the sales enablement platform. LinkedIn and Sales Navigator, along with **Cognism Prospector**, make sure we're getting high-quality contact information. They help us build a more predictable funnel. We use a CRM to keep notes on everything.

Top tip: if you keep your CRM up to date, everything else becomes a lot easier.

2 - Qualification

Qualification isn't just 'stage 2' of the sales pipeline. It should be happening throughout.

It's important to be an ethical salesperson. You need to be sure that the person you're speaking to will benefit from what you're selling. If we're not the right fit for them, it'll lock up some of their budget. You'll end up with a problem customer - which isn't good for anyone.

Finding the right way to qualify leads depends on your company size and strategy.

There are several qualification ideologies you can use, BANT, MEDDPIC, PACTT etc. At the moment we're using **BANT** because it's more in line with our sales strategy. It's simple and we are scoping. We use the minimum requirements so we can see what works - and what doesn't.

Qualification can also be supplemented by sales technology.

The bottom line is 'if we speak to this person, will it progress to an opportunity?' You can build a better idea of this by using sales tech. Record your conversations. We use **Jiminny** to transcribe ours - and log everything of note in your CRM. The more information you have there, the more accurately you can qualify prospects.

3 - Meeting

Before any meeting happens, the salesperson needs to prepare. The quality of preparation depends on the quality of the notes. Once again, updating your CRM is key.

Before the meeting, I give myself 20 minutes to go through my CRM, my sales enablement platform, and also speak to the SDR. Because we've kept good notes up to this point, we're able to jump straight into the call without going over the same points again. Making things easier for the prospect will make things easier for you - so take good notes!

Then, once you're up to date, it's time for the sales call.

Always have your camera on. It builds trust and credibility. People like being able to see who they're speaking to - especially at the moment whilst working from home is the norm.

The start of the call is about building rapport and answering any questions they have. This helps you to position yourself as a helpful contact, and gain information about the prospect.

Throughout the call, and all other communications with the prospect, you want to be demonstrating value. They have to look forward to every conversation you have, or they'll stop turning up.

This can be done by...

- Telling the prospect about your product and the challenges it will solve.
- Answering any questions they have.
- Clearly demonstrating the value your product could provide for them.

Answer their questions on the call, and if there was anything you couldn't answer, send it through in a follow-up email. Then book in the next call and send through an agenda so you have concrete next steps on both sides. If you leave the call without doing so, the odds of you reaching them next time are drastically lower.

This is my advice for **conducting product demos**:

I always write my notes by hand. Look into the camera when you're speaking to someone and demonstrate that their time is valuable to you. If you're typing the whole way through a demo, it doesn't look like you're engaged. You're busy focusing on transcribing the conversation rather than listening to it. It takes longer to type this up after the call, but doing so helps you to recap your conversation afterwards. It's worth it.

If you do want to transcribe your call, let technology do it for you. Tools like Jiminny and Gong will transcribe everything that's said during your demo, so you don't have to worry about it.

4 - Consideration and decision

Similar to qualification, consideration isn't just a single stage of the outbound sales funnel. It's a process which is ongoing from your first meeting all the way to the last.

Arrange checkpoints every 5-14 days to catch up. You need a touch point arranged so they don't just drop off the radar, even if it's just a quick phone call. Don't just call and say **'do you have an update for me?'** You still need to provide value.

Instead, say **'Hi, I'm just checking in to see if you've spoken to X and Y. I also saw this article on LinkedIn I thought you might be interested in, here's a link.'**

Over time, a salesperson should collect the content they send to prospects, so they have a library to refer to.

You should always have some good content ready. It doesn't even have to be something your company created. Sending something relevant and interesting shows that you're really listening to the prospect and trying to solve their problems.

During the decision period, there's not a lot the salesperson can do. It's mostly about tying up loose ends and ensuring everything runs as smoothly as possible.

The best way to keep in contact during the decision phase is on the phone or via a video call. Find out where the prospect is up to with their decision, and help in any way you can. Maybe you need to arrange a meeting with other people in the company to get it over the line. Maybe you need to send through some more information. It's all about making things as easy as possible for the prospect.

5 - Closing

The prospect has made their decision. They want to buy your product and become a customer! The B2B lead generation cycle is complete...or is it? It may seem like you're at the finish line, but the salesperson's journey isn't over just yet.

You have to make the final stages go as smoothly as possible. If they have any questions, answer them as quickly as you can. Send through a contract without sending it at an unsociable hour. Signing a contract should be an easy process. If you use signing software like DocuSign, PandaDoc or GetAccept the prospect only has to click a couple of boxes to become a customer. This is really worth the investment.

Once they've signed, it's also the job of the salesperson to make sure they're ready for the next steps.

You have to deliver what you said you'd deliver. For us, this means introducing them to their dedicated Customer Success Manager and giving the CSM all the information they need. A new customer shouldn't have to worry about anything, it's all been taken care of. Throughout the entire sales process and beyond, simplicity is king.

Key takeaways

"In every aspect of sales, you need to make things as simple as possible. Be clear, succinct, upfront, and honest. Outline everything for the prospect and deliver everything you need to in as few words as possible. The easier you make the process for the prospect, the easier they will find it to sell your proposition to their team."

A quick guide to the B2B buyer's journey

Sara Cronsioe, Content Lead at **GetAccept**, shares her company's knowledge on the B2B buyer's journey and how to manage it.

HubSpot defines the buyer's journey as the process buyers go through to become aware of, evaluate, and decide to purchase a new product or service.

Today, buyers don't see any value in being prospected, demoed, or closed. They rather look for additional information about your product or service that they can't find online.

According to Sirius Decisions, **67% of the buyer's journey** is now done digitally! The plethora of quality information on the internet makes it very easy for buyers to collect information independently. And that means your outbound sales reps have less access and fewer opportunities to influence their decisions.

In fact, Gartner research finds that when B2B buyers are considering a purchase, they spend only **17% of that time** meeting with potential suppliers. And if you consider that they compare multiple suppliers, the amount of time they spend with your sales rep may only be 5-6%.

B2B sales leaders often attribute this lack of customer access to a failure on the part of sellers to deliver enough value as part of a typical sales interaction. However, the problem is rooted far less in reps' struggles to sell and far more in customers' struggles to buy.

The typical buying group for a complex B2B solution involves 6-10 decision-makers; each armed with 4-5 pieces of information they've gathered independently. At the same time, the set of options and solutions buying groups can consider is expanding as new technologies, products, suppliers, and services emerge.

These dynamics make it increasingly difficult for customers to make purchases. In fact, more than three-quarters of the customers Gartner surveyed described their purchase as very complex or difficult.

So as a successful salesperson, you better align your B2B sales process with the buyer's context by understanding the buyer's journey. Once your reps are able to connect the two they can:

- Improve the buyer experience.
- Build value for your product or service.
- Increase win rate, and...
- Move prospects quickly through the sales funnel.

How does the B2B buyer's journey differ from B2C?

1 - You sell to teams, not individuals

A B2B buyer's journey is unique in that, a B2B customer is often more than a single customer. In B2B, you're selling to an entire team or group of people, all of whom might have input in the purchase decision.

According to a **recent study**, 79% of B2B buyers said there are 1-6 people involved in the purchase process. Hence, the decision-making process is longer and more tedious. This is a clear contrast with B2C buyer's journey, where the buyer is often an individual and the purchase decision is faster.

2 - The deal sizes are bigger

B2B transactions are typically larger, both in terms of deal/order size and total revenue per customer. These deals can take a lot longer to develop. But when they do, you often make a lot more money on each sale.

This also means that, as compared to B2C companies, you can be more choosy and afford to pay more to acquire each B2B lead. You want to make sure they'll be the right fit for your business. This is why B2B companies don't need to go viral on social media, but B2C ones often do.

3 - The sales cycles are longer

When you sell a large deal to a big team of decision-makers, the inevitable result is longer sales cycles. The average B2B buying cycle is 6-12 months, which is typically much longer than B2C.

Most consumer purchases throughout the course of a year fall in the ~$100 range. And these can often be made on impulse without too much thought, research, or in-depth analysis.

That means you need a much, much slower ramp from attention to interest to purchase. You have to break down your marketing and sales strategy into bite-sized chunks that can be consumed over the course of a few months.

The trick is to provide more education and value upfront to help all of the various decision-makers get on board. In other words, you need a logical progression of micro-conversions to seamlessly lead people from one step to another.

4 - B2B is more emotional

On the surface, it seems like B2B decision-making would be more logical, while B2C is more emotional. However, that's not the case. According to CMO.com, on average, B2B customers are significantly more emotionally connected to their vendors and service providers than consumers.

According to Bain, B2B offerings provide customers with **40 distinct kinds of value**, organised into a pyramid with five levels. Yes, there are a few specific things B2B buyers look to make sure a vendor or partner is in the right ballpark (a logical decision). But after that, it becomes more about who's a better 'fit' than which one is providing the lowest price (an emotional decision).

What are the stages of the B2B buyer's journey?

From a high-level perspective, the buyer's journey consists of a three-step process:

Awareness
The buyer realises they have a problem.

Consideration
The buyer defines their problem and researches options to solve it.

Decision
The buyer chooses a solution.

When we break the buyer's journey down and set it against the classical sales process, it's easy to spot the alignment shortages many of today's sales teams are facing.

To improve your **sales effectiveness**, you have to invest time and revise your sales process. Rather than centring it on a scripted sequence of product-first messages, you have to focus first on guiding your buyers through their journey.

Aligning your B2B sales process to the buyer's journey – in 6 easy steps

Now let's deep dive into each stage and see what you can do to align your sales process to the buyer's journey.

1 - Awareness of need

At this early stage, the buyer realises they have a problem. They identify and define a challenge/issue or an opportunity they want to pursue. They're asking themselves if the need is significant enough to warrant action.

Marketing

Your job is to create awareness of your product, service, or company so that your buyers begin to understand what you do, and how you can help them. Your data driven marketing department should create content focused on your buyer's pain points - not your product or brand.

Sales

The best sales professionals don't merely wait for the buyer's journey to start - they start it themselves! For instance, in order to enter the discussion in this early part of the journey, you might take cues from broad industry issues and leverage them as insights to shape your prospect's thinking.

2 - Investigate options

Once your buyers begin to realise that they have a particular pain point, the research begins. The first stage of research begins with general, broad search terms as buyers explore the options at their disposal. At this stage, they typically look for educational material, customer reviews, and testimonials.

As they do some research, they'll begin to understand which criteria do and do not meet their needs. At this point, they might eliminate some of the vendors who don't provide the functionality or service that they're looking for, narrowing their focus to just a few competing companies.

They also define the desired outcomes, clarify which stakeholders will be involved and how success will be measured. Often, they use this information to help draft an RFP and establish a budget.

Marketing

Educational content like whitepapers, analyst reports, and industry surveys are going to be critical at this stage. Make sure you have these types of resources on your website. Consider using a marketing automation tool and build lead nurturing campaigns to gradually deliver this content to prospects.

Sales

Sales professionals need to get engaged with B2B prospects at this point because stakeholders will decide if they can develop a solution in-house. To earn the sale, it's critical for your sales reps to begin to get an accurate read on the customer's needs and demonstrate how you will deliver results that exceed an internal solution.

3 - Committing to change

At this stage, buyers have clearly defined their goal or challenge and have committed to addressing it. Once they narrow down their choices to just a few companies, they'll return to the research stage again. But this time diving even deeper into each company's specific offerings to see how they can address their particular pain points.

This is the stage where they'll start reaching out to sales reps for further inquiries or personalised product demos, so that they can really drill down into the features that matter to their teams.

At this point, more stakeholders might enter the picture. And this brings more biases and diverging opinions into the mix. As a result, priorities might change along with decision criteria and requirements. ROI enters the discussion.

Marketing

As your buyers continue their research, you can update their lead scores in your marketing automation tool to further qualify them and keep track of their growing interest.

Sales

Sales reps have to help the buyer understand what's important and what are the benefits of making a change. They always have to act like a trusted advisor and put themselves in the buyer's shoes.

4 - Solution selection

This is the stage where buyers have to secure buy-in from upper management. To get a sign-off from their C-suite colleagues, your buyers will begin focusing on content that contains information about pricing, ROI, and the bottom line to justify their expenditure.

Marketing

When creating content for this stage, remember to speak the language of the C-suite. Drop the marketing-friendly phrases like "creative new approach" and "cutting-edge technology" and focus on the big picture like "increase revenue" and "return on investment".

Sales

At this stage, your sales reps have to act like a consultant. They have to help the buyer convince internal stakeholders. Proving the value of your solution becomes very critical. You have to convince the buyer that your solution is the best.

5 - Validate choice

At this point, buyers have already decided on a solution category. Once they have the support of upper management, they're ready to select a vendor and make a purchase.

At this point, they'll start thinking about preparation, implementation, quick start costs, and customer support - the final items that will determine which solution best fits their needs and budget.

At this point, the customer gets serious about costs. They consider the risk of doing nothing and the risk of choosing the wrong solution. Customers need assurances that implementation will be fast.

Marketing

It's finally time to get brand-specific with your content. Have a number of case studies and customer testimonials on hand to show prospects what others have achieved by choosing you, and how positive their experience has been.

Sales

Each stakeholder has a different perspective on the solution. Each assigns a different value to the capabilities. Your sales reps have to create this alignment and drive the customer's momentum by articulating the opportunity costs associated with the status quo.

6 - Purchase

Finally, after all these months, your buyers have selected a vendor and are ready to purchase. It's time for paperwork, set up, and implementation. At this stage, price and terms enter the discussion. Customers will use negotiations to defray risks by seeking a lower price to reduce financial exposure.

While procurement, finance, and all other stakeholders are comparing the implicit and explicit costs associated with your solution, your buyer will continue to research best practices, implementation guides and more, to make sure they're ready to hit the ground running with their new solution.

Marketing

Consider creating a drip nurturing program for your customers with helpful content on the more advanced features of your product. Supply tips for using your product more effectively and efficiently. If you can help them see more value from your product, they're far more likely to remain your customer when renewal time comes around.

Sales

The buyer will consider what they're willing to trade or concede to get the best value. Sales professionals face customer objections. The goal is to resolve objections rather than overcome them. Overcoming an objection can result in relinquishing terms to the customer or diminishing the scope of the sale.

Leverage sales technology for alignment

According to MIH, investments into streamlining processes and technology are also changing with the clear intent on optimising the **buyer experience**. The top-three areas in spending include sales and support technology, investment in people, training and service interactions and **sales automation technology**.

Understanding the modern buyer's journey is difficult for two reasons. Firstly, it's a dynamic process. The buyer's path is not linear. It has twists and turns and traces an ever-changing route. The sales professional must anticipate these movements to stay ahead of the next curve.

Secondly, it's obscure to most sales professionals because it happens behind closed doors, within the buyer's business. As your sales rep works to advance his sales cycle, your prospect simultaneously works through a journey of their own. But you need an understanding of this unseen process because it governs the speed and distance of deals moving through the sales cycle.

Part 2: Sales tactics

The no BS guide to identifying sales-qualified leads (SQLs)

Identifying sales-qualified leads (SQLs) is all about evaluating a prospect's suitability to your product or service.

It's a big deal. Because without proper qualification, your sales team will end up wasting their time with people who aren't ready to buy.

That makes them annoyed. And it hits your business in the pocket.

So how do you go about doing it properly? Let's find out.

What is a marketing-qualified lead (MQL)?

Before we get into SQLs, we need to talk about what comes before them. That, of course, is marketing-qualified leads (MQLs).

An MQL is someone who's come through your **lead generation** strategy and has been deemed likely to become a customer. The qualification is based on engagements the person makes with your content.

The marketing team, including content marketers, campaign marketers and performance marketers, make this call. They review things like:

- Web pages they visit.
- Landing page forms they fill out.
- Whitepapers they download.

Once satisfied, the marketing team passes the lead over to sales. And depending on the strength of your qualification process, they could later become SQLs.

What is a sales-qualified lead (SQL)?

To see if the MQLs can move further through the marketing funnel, the sales team – including Sales Development Representatives (SDRs) and Business Development Managers (BDMs) – initiates direct contact with them. Usually, this takes the form of a sales phone call.

When the sales team is happy the MQLs show concrete intent to buy your product or service, like magic, they become SQLs.

How do you identify SQLs?

Now for the good stuff.

To make sure your SQLs are always on point, you need to use a formula.

At Cognism, we use **BANT** (**B**udget, **A**uthority, **N**eed, **T**ime).

Budget

To a certain extent, successfully identifying SQLs is a money question.

After all, a prospect could be your company's biggest fan. But they could have the world's smallest budget.

To avoid any awkwardness, Jon advises you to get this part of the conversation out of the way quickly.

"Always ask your prospect if they're comfortable with your price point. Then you can start thinking about building an implementation plan and setting timescales."

cognism

Key takeaway

If you want shorter sales cycles and higher conversions, you need a solid grasp of your prospects' finances.

Authority

Great, you've got a high-intent prospect.

Not so great, it's someone who's currently being onboarded at the company. In the most junior position they have.

To properly identify an SQL...you either need to speak to a decision maker or an internal champion who could influence a decision maker.

Rachel says:

"Deciding SQLs isn't single-threaded. You need to find a way to engage the multiple stakeholders who are involved in the decision-making process and understand the business impact of a purchase."

cognism

Key takeaway

Your ideal customer profile (ICP) should guide you when targeting prospects. A solid one will mean you target people with the right seniority most of the time.

Need

No one wants bad-fit customers. Literally, not a soul.

That's because your life and theirs will be made far more difficult than it needs to be. All because you didn't properly qualify a lead.

To make sure that doesn't happen...you've got to find out whether your prospects need what you can deliver.

Hugh adds:

"Prospects need to state clearly that your product or service is a top priority for them and their business."

cognism

Key takeaway

The more good-fit customers you have, the more you'll retain. That'll allow you to scale your sales quickly.

Time

Super-long deal cycles suck. That's why it's best practice to:

1. Find out the purchasing timescale prospects are running on.
2. Try to close the deal within a six month period.

Ole speaks from experience when he says:

"You should focus your attention on prospects looking to buy within the next quarter. If there's no urgency, it's likely there's no immediate need for your product or service."

cognism

Key takeaway

Clogging up your pipeline will frustrate your team. But by using the BANT criteria, you can determine if your leads are "sales-ready".

What to do after qualifying a lead

Researching your leads thoroughly, focusing on their pain points and outlining how your product solves them is the bread and butter of B2B sales.

But where do you go from there? And how can you build a predictable engine for lead qualification?

Well, at Cognism, we've developed a lead-scoring system.

By giving each lead a grade, we can prioritise warmer leads and accelerate our sales cycle. To do this, we consider lead scoring factors like:

- Responding to your cold email with questions about your product.
- Contacting you directly via email or your website's contact form.

- Registering for a bottom of the funnel (BOFU) webinar or upcoming event.
- Revisiting certain pages of your website multiple times, such as your product page or pricing page.
- Arriving at your site from a referral that has shown to produce SQLs in the past.

The final point here will depend on your business and network.

But you might find that leads from a targeted ad are more (or less) interested in buying than those who search for your business directly.

Taken collectively, these actions make it clear your prospect will be receptive to a call from your sales team.

And as a result, you'll be able to build a solid list of sales-qualified leads.

How to build a killer cold calling strategy

We asked **David Bentham**, Cognism Inside Sales Director, a simple question: what is your cold calling strategy? He replied with 5 actionable steps.

cognism

If the stats are to be believed, the dice are loaded against cold callers. On average, it takes **18 calls to connect with a prospect**.

Let's make that clear - 18 calls just to connect, not even to engage or make a sale. It's enough to make even the most battle-hardened sales veteran call in for evac!

Here's a question for you:

Does cold calling really have to be that hard?

At Cognism, I'm proud to say our B2B sales team is a model for cold calling success. Last quarter, they increased their number of meetings booked by 20%, breaking company records in the process - and all this during an unprecedented global pandemic!

What's behind this phenomenal hit rate?

Skilled salespeople, persistence, great sales tech...these are all good, but what really matters is a strategy. You need to have a sales strategy for cold calling. Without that, you're going into battle without a plan and setting yourself up for defeat.

5 tips for building a killer cold calling strategy

1 - Know who you're calling

The road to cold calling success starts long before you pick up the phone.

Your first task is to improve the list of leads you're going to call. You'll never get the results you want if you're calling the wrong people at the wrong time.

Kick-off this process by working out who your ideal customer is. Think about the type of person who would get the most value out of your product or service. Ask yourself the following questions:

- What industry are they in?
- What's their job title?
- What's their company size?
- What technology do they already use?
- What business challenges do they encounter day-to-day?
- How would your product help to solve those challenges?

When you've got the answers to these questions, put them all together to make your Ideal Customer Profile, or ICP. Your ICP should be an easy-to-understand document that tells you exactly who you should be cold calling.

Next, build out a list of leads that matches your ICP right down to the ground.

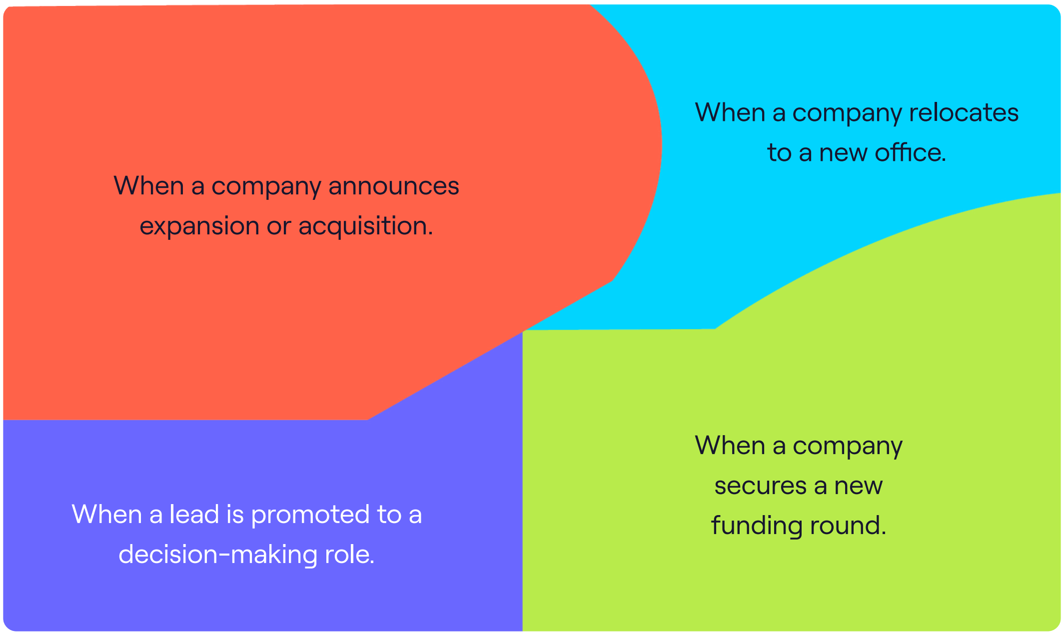
You can do this manually via LinkedIn/online research, or you can use tech to make it quicker. **Cognism Prospector** is a list-building machine - simply select a few filters, click a few buttons, and you'll be given a lead list that's 100% relevant to your chosen profile.

2 - Prioritise your cold calling leads

Knowing who you're going to call is one thing; getting their contact details is another. Once you've built a lead list containing all the data you'll need, what then?

Not every lead you call is going to be totally ready for your pitch. What you need to do is work out a system for prioritising your leads, so that you're hitting the right people, at the right time, with the right message.

Sales triggers are what will help you out at this stage. These are any events or occurrences that open up an opportunity and make a sale more likely. Examples include:



There are 2 ways of managing sales triggers: either you can track them manually, by following the lead and their company on LinkedIn - though this can be a very time-consuming and inaccurate process - or you can use tech to do it for you. Again, Cognism Prospector includes sales triggers as standard, informing you of the best times to cold call.

Prioritise your list of leads using sales triggers. Put the "trigger-ready" leads at the top of your list and the leads that aren't at the bottom. Don't worry - we're not going to ignore those "trigger-less" leads. They still fit your ICP, after all!

At this point, loop in your marketing team. Ask them if they'll be able to create some content aimed at the less sales-ready leads, warming them up while you progress to the next stage.

3 - Smile and dial!

The third stage in our cold calling process is where the action happens. This is where you pick up the receiver, punch in numbers and get selling!

Sounds easy, right?

Wrong!

This is the stage that can make or break a sales rep.

I asked my SDRs for their advice on how to make a successful cold call. Here's what they told me:

Research the lead thoroughly before you pick up the phone

Connect with them on LinkedIn. Visit their company website. Take note of anything you find that'll help you on your cold call.

Focus on pain points

Ask open-ended questions to uncover them. For example: **"How much time does your team spend on finding new business?"**

Then, present your product as the perfect solution to that pain.

Speak with energy and confidence

Be aware of how you sound over the phone. Don't be a robot! If you don't sound enthusiastic about what you're selling, the prospect won't be interested in buying.

Be an active listener

A good tactic is to repeat the prospect's words back to them. For example: **"Okay - your sales team are finding their leads through LinkedIn."**

This shows you're engaged and paying attention.

Bolster your cold calls with customer case studies

Have some stats to hand about how your product helped them. Just make sure the case study you're quoting from is relevant to the prospect's business!

Take notes

Always take notes when you're on a cold call. If you don't, you will forget what was discussed! Tidy up your notes after the call ends. The key points to focus on are the lead, their company and whether you had a good rapport with them.

4 - Add email and social to your strategy

For us at Cognism, cold calling is the most essential outbound sales activity. It's where deals are won or lost. But it can be made even more powerful if it's used as part of a combined, multi-channel approach.

Outbound email, social selling, voice and video messaging...these are all elements that the modern B2B sales rep has to master.

People are active on so many more channels, and the channel that one lead prefers will be different from the next. You want to be engaging with your leads on the channel that matters to them.

Start by creating a timeline of all the steps you're going to take and on which days. This timeline is called a cadence. Have light-touch, introductory steps (LinkedIn connection requests, personalised emails) at the beginning of the cadence, before ramping up engagement later on with cold calls and personalised videos.

The idea is to contact your leads using a mix of methods. Doing this will increase your chances of getting a response.

Now, you can manage cadences manually, using your business email account, work phone and Outlook calendar. But again, you'll find this to be a real drag on your time. The most successful B2B sales teams use prospecting technology to automate their cadences.

5 - Track your cold calling progress

Don't overlook this final, but crucial, step. Analyse your cold calls and identify areas where you can improve. Here are some practical tips:

- **Record your cold calls, both good and bad.** Listen back to them. Why did the successful ones work so well? Why did the unsuccessful ones fail? What can you learn from them?
- **Share your best cold calls with the rest of your team.** Encourage them to do likewise. Create a process for sharing knowledge across your team. At Cognism, we have a #coldcalling Slack channel dedicated to this!
- **Try A/B testing your cold calls.** Over a period of weeks or months, practice 2 different styles of sales pitch. Test each version on real-life prospects. Which style was more successful? Use any insights to improve your calls going forward.

The bottom line is: when you see a pattern of what's working on your cold calls, double down on it. When something isn't working, don't be afraid to change it. Be data-driven in everything you do.

The ultimate cold calling script for SaaS sales

Anna Crowe, Head of Content at **Leadfeeder**, asked her sales team for their top-performing cold call script. It's presented here in full.

Does the idea of cold calling make your blood run cold?

When you think of cold calls, do you think of guys in smoke filled-rooms, making promises they have no intention of keeping?

Cold calling gets a bad rap.

And it's easy to see why. If you've ever been on the receiving end of a crappy cold call, you know how frustrating it can be. Maybe you think that email is better than cold calling, so you've thrown in the towel?

The truth is cold calling still works, and it doesn't have to be sleazy.

In fact, **69% of buyers** have accepted phone calls from new providers in the last 12 months, making phone calls one of the most effective methods for cold calling — but only if you do it right.

A fully-customisable cold calling script for SaaS

Here's the thing - **57% of C-level and VP buyers** prefer to be contacted by phone. You aren't bugging most people when you call; they want to hear from you.

If you're ready to learn how to create a cold calling script for SaaS that actually works, then read on!

But there's one caveat - this is less of a script and more of a guide.

Why? Because successful cold calling is about relationships - and you can't build a relationship when you're reading a script.

That said, there are some benefits of having a script for **SaaS sales**. It gives you confidence because you won't worry about forgetting an important part of your call.

Step 1: Introduce yourself

A smooth introduction to your outbound sales call is the most crucial step.

If your introduction flops, you won't get past the first few seconds. Keep this brief, but try to generate a bit of curiosity about who you are and what you do.

Keep it simple with something like this:

"Hey <name>, this is <your name> with <company>. How's your day going?"

It's nothing fancy; it gets the conversation started. But you can get a bit more creative. How about...

"Hey <name>, this is <your name> with <company>. Do you have three minutes to talk about <the core benefit of your SaaS solution>?"

That three minutes part? It's crucial.

Why? Because most people don't want to get stuck on the phone with a pushy salesperson for an hour - especially when they should be focused on preparing for a meeting or answering emails.

By leading with the three minutes, you're reassuring the prospect that you aren't going to take up too much of their time.

Step 2: Hit them with your value proposition

You've already promised to keep it short and sweet, so there's no reason to beat around the bush.

Tell your prospect how you can help them do something better. Not what your tool does - how it makes their lives easier or their business better.

Ideally, you already have a decent idea of what type of challenges they face - either by researching them on LinkedIn, reading their blog, or digging into other content they've produced.

If not, lead with a stat and then talk about how your tool or service solves that issue.

"So I noticed your company is struggling with <challenge>. I'd love to help you out by <how you solve that issue.>"

Or:

"We've found that 89% of SMBs are struggling with <x,y,z>, which is why we want to help you <solve a specific problem> by <how your tool helps>."

Step 3: Ask questions

Here's another reason why true scripts don't work - your call should be a conversation.

You need to adjust your pitch, your tone, even your questions to each specific call. Otherwise, you'll sound like a commercial.

Ask open-ended questions that require more than just a yes or no answer. This helps get the prospect talking - which creates a bond and gives you more information about their challenges, which you can use to personalise your pitch.

Here are a few examples of questions you can ask:

- "Who exactly is your target audience - are you aiming for smaller businesses or enterprise level?"
- "What solutions have you already tried? Why didn't they work?"
- "How do you think improving <area your tool/service focuses on> would help your business?"
- "Who is part of the decision making process, and what holds them back?"

The best open-ended questions start with who, what, or how and keep the conversation going.

Step 4: Outline the next steps

Ideally, the final step is the close - they're so amazed by your product or service that they're ready to sign on the dotted line.

In reality, though?

It's usually not quite so simple. Which is why you need to make it clear exactly what the next steps are. Here are a few examples:

"Great, I'm glad to hear this will help you solve a problem. I can get you set up for a free trial so you can start seeing results today."

Or:

"I'd love to schedule a demo so I can show your team more about how we can help. How's next Tuesday?"

Or, if they aren't ready to commit quite yet, you can try:

"I understand you'll need to take this to your team. Can I send you a case study that will help you make your presentation stronger?"

Be clear about what the next step is - whether that's signing a contract, presenting a demo, or providing them with more information.

3 tips for better SaaS cold calling

If you're still doing cold calling like it's 2005, you might as well quit now. The truth is, too much has changed in the last few decades for older strategies to work.

Which is why we've put together three of the best cold calling tips for SaaS teams who want to make more sales.

Tip 1: Establish a connection before the call

Traditional B2B sales tips often say you have five to ten minutes to make your case - I'd argue you have much less.

Most people don't want to be on the phone, they want to be focusing on their work (or maybe playing Candy Crush on their phone!)

You have to hook them fast.

The best way to do that is to make sure you know who you're talking to, before you ever pick up the phone.

So, how do you do this?

Hit up LinkedIn and view the prospect's profile. Learn who they are, what type of content they share or even write. Are they into anything like cars or sustainable gardening? Use a lead generation tool to see if anyone at their company has visited your website, and find out what pages they visited.

This information will give you the insider knowledge you need to build an actual connection.

Tip 2: Get creative to overcome objections

You'll need to solve customer pain points to close the deal. So, what do you do when your prospect has an objection? Here are a few ways to overcome them.

"Sure, send me an email."

If the prospect says this, ask a basic question to qualify them. If you can keep them on the phone, you might not need to send an email at all.

"I'd love to but so I know exactly what to include in my email, can you tell me <who your target audience is, etc."

"I don't have time."

Say to them:

"No problem, when is the best time to schedule a quick, two minute conversation? I want to see if our tool is a good fit for the challenges you have before I take up any more of your time."

This lets them know you only need a few minutes, and they might just stay on the phone once they realise you'll be quick. Try not to be overly pushy - if they need to go, offer to follow up another time.

"I can't make a decision right now (or I need to talk to my boss, board, etc.)"

Don't let them off the hook - find out when the meeting is, who will be involved, or what they are worried about.

Tip 3: Set a goal - for rejections

Entrepreneurs often struggle with cold calling. Maybe you hate calling people or you don't like feeling pushy. The feeling of rejection stings, and feeling like a nuisance sucks.

So, try this.

Instead of setting sales goals, or even a goal for the number of calls you want to make, set a goal for the number of rejections you want to get in a day or week.

Make a spreadsheet, draw a pie chart on a poster board; whatever makes you feel motivated.

Each time you get rejected, mark the occasion. Celebrate it - you are one step closer to your goal!

Overtime, those rejections will start to sting a bit less, and you'll see your sales numbers start going up.

2 cadences for content leads

Evangeline Crossland is Cognism's MDR Sales Team Leader. In this section, she shares 2 winning cadences that she uses to engage with marketing leads.

cognism

At Cognism, we've pioneered a brand-new B2B sales role: the Marketing Development Representative (MDR).

It's a step-up from the normal SDR role. Instead of researching leads and cold calling prospects, the MDR actions leads generated by the marketing team. These include:

- Prospects who have completed a desired action, such as filling out a form or requesting a demo from a website page.
- Prospects who have engaged with the content produced by marketing, such as downloading a whitepaper or signing up for a webinar.

As the leads have already interacted with our content and are aware of our brand, they tend to be "warmer" than the cold leads generated from **outbound sales**.

Because of this, the sales cadences used by MDRs have a slightly different emphasis and style. They're more about sharing knowledge and insight, rather than pushing product features and benefits.

Which isn't to say that they've been any less successful than an ordinary **B2B prospecting cadence** - quite the opposite, in fact! In Q3, closed-won deals from marketing content increased by nearly 8% compared to Q2; a lot of that success is down to the cadences.

What follows are 2 of the top cadences that I use to connect with and nurture marketing leads. Starting with...

1 - Cadence for content downloads

Cadence timeline

Day 1	**Day 3**	**Day 4**	**Day 5**
Step 1: Email **Step 2:** LinkedIn InMail	**Step 3:** Email	**Step 4:** Phone call **Step 5:** Email	**Step 6:** Phone call
Day 12	**Day 9**	**Day 8**	**Day 6**
Step 13 Phone call **Step 14:** LinkedIn InMail **Step 15:** Email	**Step 11** Phone call **Step 12:** LinkedIn InMail	**Step 9** Phone call **Step 10:** LinkedIn engagement	**Step 7:** Phone call **Step 8:** Email

Cadence breakdown

Day 1

Start with a polite email, thanking the prospect for downloading the content - and then give them something extra. Make sure the "extra something" is related to the content the prospect has just downloaded. It could be a blog you've read or a podcast you've listened to.

Here's an example:

To:
Subject:

Hi (first name),

Thanks for downloading our lead gen guide, hope it's been useful.

I wanted to send across this recent blog post our CMO published. It's all about turning your hard-fought website traffic into leads. I thought there were some good tips in here - especially the ones around building a tool and compiling lists of software - I know these are hacks that are working well for us right now.

You can read the full post here:

https://www.cognism.com/blog/how-to-turn-website-traffic-into-leads

Thanks,

You should also send the prospect a LinkedIn message. Check if they managed to download the content and if they received your email.

> **New message**
>
> Type a name or multiple names...
>
> Hi (first name),
>
> Thanks for downloading our lead gen guide.
>
> I'm just checking in to see if you received the guide? Also, I've sent you an email with a link to a blog we've just published, written by our CMO. I think you'll find it very useful!
>
> I'd be very happy to hear your feedback.
>
> Kind regards,

The reason for sending 2 different messages on 2 different platforms? You want to be initiating conversations on as many channels as possible. You want to make your outreach unmissable!

Also - be sure to ask the prospect for feedback on your content. This is a great way of starting a dialogue.

Day 3

After giving the prospect a day's break (they'll need the time to look over the content you've sent them), it's time to re-engage.

Send them an email with another content link. Pick out something that's relevant to their business or industry, but not necessarily something produced by your company. Try not to be too "sales-y"; instead, give them things that they'll find valuable.

To:
Subject:

Hi (first name),

I've been listening to a number of marketing podcasts recently. I'm always on the lookout for ones that provide actionable tips and tactics I can share with our marketing team and my network.

This one from The SaaS Marketing Show was a real winner for me, as it was stuffed full of actionable advice on Chargebee's current paid strategies:

https://podcasts.apple.com/us/podcast/how-chargebee-increased-sals-by-40-episode-016/id1504073555?i=1000484506398

Their use of intent data and some of their approaches to Google Ads really stood out. Hope you find it interesting.

Kind regards,

Day 4

The prospect has received some top content from you over the last couple of days. Now it's time to pick up the phone!

Give them a call and ask them for their thoughts on the content you've been sharing. If they give you positive feedback, use it as a means of building rapport and deepening the relationship. Say that you have even more great content to share with them.

If they give you negative feedback - don't panic! Say that you'll follow up with some even more relevant content that's better suited to their interests.

Here's how you can word a follow-up email:

To:
Subject:

Hi (first name),

Thanks for speaking with me earlier. I just shared this with our marketing team, so I wanted to send it across to you as well:

https://www.linkedin.com/posts/a-croucher-mcim_theres-a-rich-landscape-of-content-out-there-activity-6689436152572854272-fiPC

It's a comprehensive list of some of the best B2B content marketing resources out there. I've signed up to a few of the newsletters and have seen a lot of value there, so thought you might want to take a look too.

Kind regards,

Day 5 / Day 6

On these 2 days, keep the momentum going with a few calls to the prospect. Remember, the aim of this cadence isn't to go in for the "hard sell" straight away; it's to grow the relationship.

Here are some tips for building rapport on your SaaS sales calls:

- Research the prospect before you call. Look at their LinkedIn profile. Have they commented on an article or shared anything exciting to do with their career or business? If so, be sure to mention it!
- When the prospect picks up the phone, acknowledge that their time is limited and ask for their permission to continue. People rarely want to say "no"!
- Mirror the way the prospect speaks. Listen out for the way they talk and the words they use - then match them! This makes the prospect more open and comfortable in talking to you.

Also on Day 6, you can bolster your calls by sending another content-focused email. Here's an example from the Cognism archives:

To:
Subject:

Hi (first name),

I've been listening to Mailtastic's Marketing Rebels webinar series and I thought you might find it interesting. They interview marketing leaders and share little-known hacks for topics like growth marketing, SEO, revenue and lead generation. Definitely worth a share! Here's the link:

https://info.mailtastic.com/marketing_rebels_webinar_series

Kind regards,

Day 8

On this day, do something different. Go to the prospect's LinkedIn feed and see if they've recently shared an article, or better yet, written one of their own. Like it or add your own comment.

Make sure you're engaging with the prospect wherever they are. The more touchpoints you create, the more likely it is that they'll interact with you.

Day 9

As well as calling again, send the prospect a LinkedIn message. Ask them what kind of content they enjoy. This gets the prospect to reveal more about themselves and what they want from you.

Also, sending them an ungated, actionable piece of content, such as a template or worksheet, can be a great value add.

Try something like this:

To:
Subject:

Hi (first name),

Did you get a chance to look at the content I've sent you? Let me know what you thought of it. It'd be great to hear what you'd like to see more of in your inbox.

We've been talking a lot in our team recently about attribution and tracking our marketing impact. One thing that came out of it was the importance of having a structured process around using UTM links and ensuring consistency with this.

Our team built a sheet for their own use, which saves them a lot of time and pain! I thought I would send it across, as it may be useful for you as well.
Here's the link:

[LINK]

Kind regards,

Day 12

It's the final day of the cadence. This is where, instead sending the prospect some content, it's time to be more direct.

Has your company published any **case studies**? Pick out one that matches the prospect's industry. Send it to the prospect via email or LinkedIn (whichever channel has been most successful thus far). Include the offer of a call so you can discuss further.

Here's an example:

To:
Subject:

Hi (first name),

I thought I'd send you this - it's a case study we published recently with a UK-based marketing agency. We helped them to boost their lead gen and close 2 deals worth £70,000 in revenue - very impressive, don't you think?

Check it out here:

https://www.cognism.com/blog/goude-mind-case-study

If you'd like to discuss our services in more detail, I'd be happy to jump on a quick call. When's the best time for you?

Kind regards,

With any luck, you'll get that call booked in and that demo arranged! If not - and this is the sad part - it's time to go for the break-up.

2 - Cadence for webinar registrations

Cadence timeline

Day 1	Day 2	Day 3	Day 4	Day 5
Step 1: Email **Step 2:** Phone call **Step 3:** LinkedIn connection	**Step 4:** Phone call	**Step 5:** Email **Step 6:** Phone call	**Step 7:** Phone call **Step 8:** Email	**Step 9:** Email **Step 10:** Phone call

Cadence breakdown

Day 1

This cadence is aimed at leads who've registered to attend a webinar, so it takes place over a shorter time span - only 5 days. It's designed to be fast and hard-hitting; webinar attendees need to be actioned quickly, before their interest drops off.

It begins with an email on the day after the webinar broadcast. Thank the prospect for registering and provide them with the recording.

To:
Subject:

Hi (first name),

I'm (insert name) from Cognism. I wanted to personally reach out to thank you for registering for our webinar - Time Management Hacks for Outbound Sales.

If you made it - thanks for being there! If not, click the link below to see the full webinar recording and slides:

[LINK]

I hope you find it helpful, and if you do, please share it with your team!

Kind regards,

This email acts as an introduction; the prospect is now aware of who you are and where you're from. Sharing the webinar recording is best practice and maximises the chance of engagement. Even if the prospect replies with a simple "Thanks", that's still a good sign. Remember, this first touchpoint is about commencing a dialogue, not closing a sale.

Also follow up on Day 1 with a phone call and a LinkedIn connection. Ensure your engaging wherever the prospect is; this boosts the odds of a successful conversion.

Day 2

The next cold call of the cadence is to check if the prospect has watched the webinar recording. Use the webinar as a springboard to finding out more about the prospect and their company.

A word to the wise - make sure you've done your research! Listen to the webinar in full before your call. Look over the prospect's personal LinkedIn page and their company page. Pick out 2-3 points from the webinar that are relevant to their prospect and their business.

Use these points to initiate the conversation. However the prospect responds, draw a link between their answers and your product.

For example, if the prospect talks about using technology to manage their time better, you can reply by explaining how your product has helped other companies in their sector to boost their productivity.

Don't use a fixed cold calling script - it can make you sound robotic! Instead, just have a couple of notes next to you and let the conversation flow naturally.

Day 3

On the third day, send the prospect some more relevant content. Like this:

To:
Subject:

Hi (first name),

Having lots of sales conversations is great, but I think we'll both agree that in sales (and business in general) quality is way more important than quantity.

How do you make sure you're speaking to the right people and booking better meetings at (company name)? That's exactly what we asked our high performing SDRs Evie and Ash.

The answers? You can find them **here**.

Hope you find the blog helpful!

Kind regards,

Why does this email work?

- **Notice the personalisation** - both the prospect's first name and company name are included.
- **Notice the language** - polite and involving ("I think we'll both agree.."). From the start, it's creating a sense of togetherness between yourself and the prospect.
- **Notice the content** - the blog that's shared is hugely beneficial to this persona (sales team leaders). Always match the content you share to the prospect's role.

Day 4

For this cadence, you want to be engaging every day. After sending the blog on Day 3, call the prospect and get their thoughts on it.

At this point, you also want to be introducing the idea of the prospect booking a meeting. A good way of doing this is to quote a case study from a satisfied customer. Don't just select any old case study, though - it must be from a customer who works at a similar business to the prospect.

Say something like:

"We're actually working with a company in your industry right now - (company name). Working with us, they achieved (result) in (time frame)."

You can also say that you'll send the prospect the case study straight after the call. Here's an example email:

To:
Subject:

Hi (first name),

Did you get a chance to read the blog I sent over? Let me know what you thought of it, it'd be great to hear what you'd like to see more of in your inbox.

This time I wanted to send you a recent case study from a US client of ours - with us, they booked 4-5 meetings a week on average. You can access it **here**.

Kind regards,

Day 5

It's the final day of the cadence! So far, you've given the prospect some great content and a case study. Now it's time to hit them with a more direct appeal for a meeting.

Here's a message I've used before:

To:
Subject:

Hi (first name),

Do you think your team could benefit from getting directly in touch with the key decision-makers in (company name)'s industry?

We have a unique data asset of 400M B2B profiles. Using the Cognism platform, you can run searches to segment this down to find your ideal customer.

Would you be open to a conversation this week?

Kind regards,

You can afford to be more direct, as you've already spent some time building a relationship with the prospect and sharing insights with them.

You should also follow up this email with a phone call. Ask the prospect if they have time to see a demonstration of your product.

If they reply with something like:

"Can you send me more information?"

You can say:

"Sure, I could send you that. But it would be a lot quicker for you to see the tool for yourself. Would you be totally against seeing a 15-minute demo?"

Always lead the prospect towards your ultimate goal - booking that meeting!

8 common B2B customer pain points - and how to resolve them

Pain points! Every B2B customer you speak to will have them. Here are 8 of the most common - plus our tips for resolving them. Featuring Nancy Newman and Hugh Campbell from Cognism Sales.

cognism

"Hello Sir or Madam. Would your company be interested in signing up for our product or service?"

"Yes please, we would love to. Where do I sign?"

- No sales call, ever! 😆

If B2B sales was easy, everyone would do it. Learning a product description and writing a cut-and-paste sales script is no hard task. The difficulty is in overcoming customer pain points on the fly - this is what separates sales from snails! 🐌

We spoke to Cognism Sales Team Lead, Hugh Campbell, and Cognism Associate Sales Director, Nancy Newman. They shared some of the most common B2B customer pain points - from cold calling to closing - and how they resolve them.

4 top of the funnel pain points

As the Sales Team Lead and former Business Development Representative, Hugh Campbell has forged his career, and those of his team, at the top of the B2B lead generation funnel. Here are some common B2B customer pain points that Hugh encounters.

1 - Unable to find accurate contact information

Fortunately, working for Cognism has its perks. With access to 16 data points on over 400 million leads worldwide, our outbound sales team is never short of quality leads.

At Cognism, we're lucky - in that we already have all of the data we need. I know from the conversations I have that loads of sales professionals spend a huge amount of time searching for good leads. My advice for them would be:

1. Work together with the marketing team and share your ICP.
2. Don't be afraid to ask for more information when you reach out.
3. Invest in the right B2B sales tech.

Basically, do whatever you can to spend less time on your admin, and more time on the phone.

2 - Unable to get through when cold calling

Many B2B prospecting successes come down to pure luck. You happen to call someone when they're free and willing to talk. When this doesn't happen, don't give up.

You have to be persistent. We hire resilient and hard working individuals because they just keep going. If you've got a team of hardworking people, you're already halfway there.

It's also important to have the right software. Tools like **SalesLoft** put leads into a system which will increase your chances of connecting. It keeps the chase going. The salesperson will get reminders to reach out, send content, and keep the company name at the forefront of the lead's mind. This will also increase your chances of success once you get through.

3 - Companies aren't ready for your solution

A company's willingness to invest in a new solution often depends on time-based factors. For this reason, it's important to collect chronographic, time-based B2B data, and use it to determine when you reach out.

If you do reach out at the wrong time, agree on a better time. There are so many factors which will determine whether it's a good time. Bad timing doesn't necessarily mean a bad fit. Ask them when would be better, and reach out then. Again, this comes down to persistence and resilience.

If you find an approach that works, double down. You'll have more success with certain businesses at certain times of the year. If you spot a trend, share it with your team and capitalise on it!

4 - Prospects aren't listening to my offer

Sales directors are bombarded with sales pitches. You need to stand out from the crowd. This is where salespeople get to explore different techniques and forge their own sales strategy.

Use different techniques and think outside the box. Things like Vidyard and personalised messages work better than automated emails and InMails. Quality will get the attention of the individual, not quantity. This is especially the case on LinkedIn, which is saturated with sales offers.

I've recently found success with LinkedIn voice notes. They don't take too long to record and they show the prospect that you've taken the time to send them a personalised message. Mass quantity approaches just don't work.

4 bottom of the funnel pain points

As Cognism's Associate Sales Director and former Business Development Manager, Nancy Newman is an expert in navigating the bottom of the funnel. Here are some common B2B customer pain points that Nancy encounters.

5 - I don't know what's happening on the prospect's end

Only having conversations with one person at a company can leave you with a blind spot. As a salesperson, you need to know what's happening behind the scenes. Not knowing that the prospect is speaking to a lot of people internally to sign off on a deal puts you in a much weaker position.

Ask them **'who needs to be involved?'** and **'what will your journey to sign this off look like?'** Try to paint a picture of their internal process. Once you've done this, you can discuss whether it would help for you to be a part of it and speak to senior management - or if you could help from behind the scenes, providing numbers and proving potential ROI.

Try to avoid being blind. If you don't know what the process looks like, you can't steer it in the right direction. Visibility is the most important thing. After I come off a call, I need to know exactly what that person is doing before our next call.

6 - Being ghosted by prospects

This all comes down to asking the right questions on the very first call. If a prospect cuts off communication with you, it's probably the result of a badly-closed conversation.

If someone likes the tool, I try to get them on my side and make them my teammate. We create a plan of action together and get it implemented. When you switch that dynamic and become a collaborator rather than a seller, they will be much more open with you. This all comes from genuinely wanting to help the prospect and - above all - believing in your product.

7 - The prospect seems annoyed at me

The meetings you're booking may seem unnecessary to the buyer. You're taking up a lot of their time and being a nuisance. This is a feeling all B2B salespeople will recognise. The key is to not be put off. This is my advice for getting things back on track.

If you're booking arbitrary next steps to meet a quota, your meetings will feel pointless. You need to provide an element of value every time you connect. If you have something to show a prospect, don't email them, set up a call. If they need time to review your offer, book the next meeting in to discuss it.

While the salesperson does need to be responsible for booking the meetings and writing the agendas, it's not good to dictate the entire process. The salesperson can't buy the product for the prospect.

Sometimes in sales you need to stop talking and start listening. The prospect needs to make a decision and you are their guide. Be on their side, be collaborative, and understand their processes so you can make it easier for them and for yourself.

8 - Prospects are wasting my time

Trying to close with a prospect who just doesn't seem interested can be exhausting. Remember, not every sales qualified lead will close - and that's ok!

You've got to know when to quit. If there's no pain point you can resolve, they will never buy. Always qualify your leads in advance, and always know when to nip it in the bud. The goal of a good salesperson is to sell, the goal of a great salesperson is to help - not to persuade the wrong people to buy from you. It's not worth making a quick buck from someone who won't be happy.

Again, this comes from genuinely wanting to help your prospects.

Nancy's key takeaway

"Be curious and ask questions. Salespeople are in such a lucky position - we're always speaking to people we can learn from. Try to understand your prospects and build a relationship with them. If you can do this, they'll be more open with you and you'll be better positioned to help with their pain points."

How social selling can fuel your pipeline

Three social selling experts - Daniel Disney, Tara Jackson and William Gay - explore how to transform LinkedIn into a lead generation powerhouse.

80% of leads were sourced from LinkedIn in 2019, making now the best time to get on top of social selling.

Here are 5 top tips, courtesy of three social selling experts.

1 - Optimising your LinkedIn profile

"You want to look good when meeting a business connection and it's the same when connecting online." - **Daniel Disney**

Your LinkedIn profile is your personal ad space when it comes to meeting potential prospects and business connections online. It's important to create a good impression and the best way to do that is with a great profile that's optimised for social selling success.

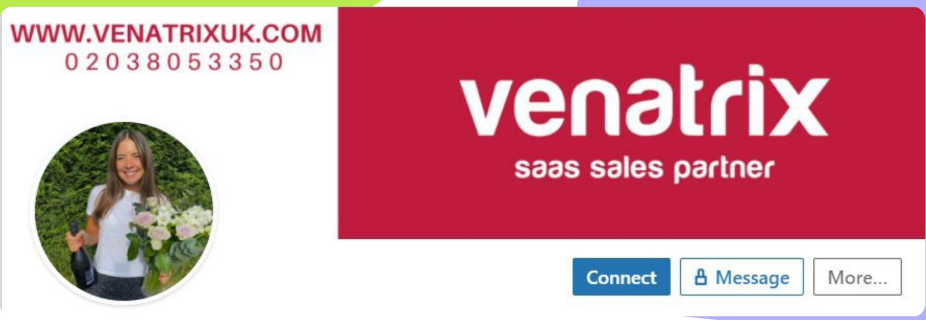
The three focus areas as laid out by Daniel are:

- A professional photo.
- A great background.
- A straightforward summary.

When optimising your LinkedIn profile, the very first thing you need to look at is your photo. It needs to be professional, not you and your friend having a great time at the bar! Rather have a friend, or a professional if you can, take your headshot against a plain wall.

If you want to seem more approachable when selling online, you can choose to use a photo of yourself that looks less formal, as long as you don't make it too personal.

Here are examples from Daniel and Tara Jackson, Senior Consultant at **Venatrix**:



When writing your bio, be sure to speak to your target market and avoid going on and on about how great you are - you'll scare your customer away! What your prospects really want to know is what you do, how you can help them and how to get in touch with you.

"Make sure your bio is personalised for the customer you want and what you do is clear. The clearer your bio the more likely you'll gain good prospects. If you're too vague, you'll get vague inquiries." - **Tara Jackson**

venatrix

2 - Building a strong network

The aim of the game is lead prospecting and the best way to do that on LinkedIn is through connections. But how can you grow your network? The formula for success is to create content that connects people.

"You'll need to find that sweet spot between personal and professional when sharing your content. People buy from people, they want to know you, so share personal stories every now and again but make sure they have meaning."

"For instance, if you do share a pic at the bar, the context behind it could be that you're celebrating a big achievement at work." - **Daniel Disney**

DANIEL DISNEY

The next step to connecting with prospects is to add people daily. Most salespeople have over 1000 connections on average. By proactively adding people on a daily basis you're extending your reach and creating brand awareness with your potential prospects.

The main rule to follow here is not to connect with over 30 people a day because LinkedIn will ban you, temporarily or permanently, depending on how often you do it!

"You need a genuine reason for connecting with people rather than just scrolling through LinkedIn pressing, add, add, add because then you'll have a whole bunch of people on your profile who don't care what you're doing." - Tara Jackson

venatrix

Keep in mind that sending a connection request is only the first step of your social selling strategy. It's not always necessary to send a connection message, as it only increases your chance of connection by 5%. People are more likely to accept your connection if it makes sense to connect and if your profile looks good.

3 - Creating a content strategy

Creating a strong content strategy is key when it comes to social selling on LinkedIn. With the implementation of lockdown across many countries worldwide, the nature of that content is changing.

"Everything has become very personal now that we're all working from home. It's great because you can share a bit more about yourself without being too personal and being accused of treating LinkedIn like Instagram." - Tara Jackson

venatrix

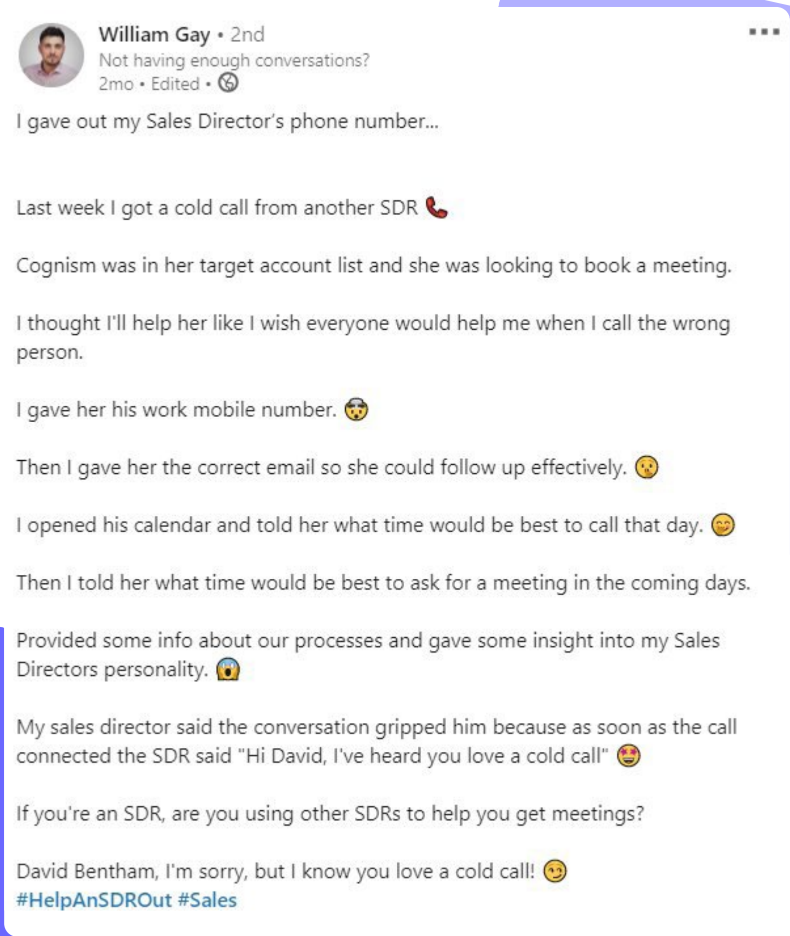
While sharing a more personal side to your business is a great way to show your prospects that you're human too and not just after the sale, it can be difficult to find a good balance and not overshare. Daniel recommends only sharing personal posts on LinkedIn once or twice a week because every great content strategy includes variety.

To get the best engagement be sure to post at least once a day and include more professional content so your connections know exactly what it is you do and what you're selling.

“It’s pointless to post pointless posts. My best advice is that you need to think of your objective and how you want your customers to feel when they see a post from you because you want to make them feel good, not annoy them.” – **Tara Jackson**

venatrix

A great example of a post that had a lot of engagement is this one published by William:



William Gay • 2nd
Not having enough conversations?
2mo • Edited •

I gave out my Sales Director’s phone number...

Last week I got a cold call from another SDR 📞

Cognism was in her target account list and she was looking to book a meeting.

I thought I'll help her like I wish everyone would help me when I call the wrong person.

I gave her his work mobile number. 😳

Then I gave her the correct email so she could follow up effectively. 😮

I opened his calendar and told her what time would be best to call that day. 😏

Then I told her what time would be best to ask for a meeting in the coming days.

Provided some info about our processes and gave some insight into my Sales Directors personality. 😱

My sales director said the conversation gripped him because as soon as the call connected the SDR said "Hi David, I've heard you love a cold call" 😍

If you're an SDR, are you using other SDRs to help you get meetings?

David Bentham, I'm sorry, but I know you love a cold call! 😏
#HelpAnSDROut #Sales

Cognism had a competition to see who could get the most engagement from a post on LinkedIn. Of course, this post won. Why? Because it told a story that was relevant and hooked people with humour. Plus, it showed personality without being overbearing.

What really works with this kind of post is that it doesn't come across as someone selling something; people connect well with that kind of content.

4 - Establishing credibility

At the end of the day, outbound sales for your business is going to go a lot smoother if your prospects trust you.

"Create a stand out profile and back it up with a great content strategy by sharing content of value. People will respect and recommend you, even if they've never bought from you just because of what you've shared." - **Daniel Disney**

What if you run out of content to post? William admitted that he has this problem on occasion. He finds that engaging with other posts is just as great as sharing your own, because you build a relationship with others while building your brand. People will learn to respect your opinion and will come to you when they need advice on a certain topic or area of expertise.

At the same time blindly resharing is a no-go! Include your own thoughts when reposting and don't copy and paste someone else's work.

"Copying and pasting what worked for someone else won't necessarily work for your brand. It's a shortcut, rather put in the effort to create your own brand and your prospects will like you more for it. If you want to reshare, only do it 30% of the time." - **Daniel Disney**

5 - Starting conversations

There are many ways to start conversations with prospects on LinkedIn. Voice notes and videos are particularly successful for kickstarting B2B sales on social media, but as much as there are tactics to help you excel, there are just as many to avoid.

"I'm all for starting conversations, but before you do, do your research and prequalify yourself by checking your bio - are you being clear about who you are and what you do?" - **Daniel Disney**

This is a tip that shouldn't go ignored. Even if you've already made the connection, your prospect is more likely to want to converse with you if you stand out as someone they want to talk to. If you dive in talking about how great you are, your prospect won't be impressed.

Tailor your message for each prospect. Find a post they shared and discuss it. Be sure to make the message short and sweet and throw in an emoji to come across as friendly. 🙂

"You need to remember that your prospects are people too. I thought of how I might communicate with a friend and the answer is - voice notes! It's different because it's personalised and short, so your prospect doesn't get the idea you're sending it to everyone. I'd say really focus on your first 10 seconds because that's what's going to hook them." - **Tara Jackson**

Creating an impactful first message is all about doing something different. Even a video message could work if done in a good way, but as with all strategies, the trick is to do your research.

Part 3: Sales performance

How to structure a winning B2B sales team

Collin Waldrip, SDR Trainer at SalesLoft and **Nick Roberts**, Alliances and Partnerships Manager at Cognism, discuss how to build a high-performing sales team for B2B.

Salesloft. cognism

In B2B SaaS sales, your outbound strategy needs to be a bit more complex than setting up a lemonade stand on the side of the road and hoping it will attract someone, anyone…even that guy from across the road who complains when your trash can ends up on his verge.

You need to think about why you're hiring people, who you're hiring, and how to drive your team to sell out all of the lemonade on offer.

We consulted with 2 incredible sales experts and got tips and tricks so sweet that even the grumpiest of neighbours will be eager for a glass!

Here's who we spoke to:

- Collin Waldrip, SDR Trainer, SalesLoft
- Nick Roberts, Alliances and Partnerships Manager, Cognism

And here's what they had to say.

Why you need a B2B sales team

The importance of a B2B/outbound sales team cannot be overlooked or undervalued. In SaaS sales, in particular, you need a team of people who are driving your engagement to build relationships and grow your customer base quickly.

The team is generating pipeline and proactively reaching out to new customers to see if there is actual interest in your product - are people still buying lemonade? Do they want our slightly sweeter offering or is the other stand's more sour version what they're after?

Having a team that focuses specifically on selling your product is essential to generating revenue and scaling your company. The more dedicated the team to specific tasks, the more likely they are to complete these.

So, it's no surprise that if you want to sell, you need a team who can do just that.

Team structure: the split between SDRs and BDMs

Now that you know why you need a sales team, you need to consider how you're going to structure your team - who is sourcing ingredients, who's developing the recipe, and who will deal with customers.

It's incredibly important to have roles in your team that...

A. make it more efficient.

B. allow salespeople to become experts in their particular field.

Who do you need on your team?

At Cognism, we structured our sales team on the premise that core outputs need to be owned by one focused role.

How this translates in practice is that we have SDRs and BDMs - all part of our sales team, but they have a different focus, different KPIs, and different daily tasks; all of which steer us to our team goal of scaling the company.

SDRs and BDMs

Our Sales Development Representatives (SDRs) are focused on booking meetings and creating opportunities. Once they've booked the meeting in, they pass the lead onto our Business Development Managers (BDMs). This is how lead generation is run at Cognism.

The BDMs then focus on generating revenue for the business and closing the customer.

Having a structure where SDRs focus solely on booking meetings and BDMs focus solely on negotiating and closing deals allows the people in these roles to become experts in their field.

This focus means driving efficiencies in certain outputs, creating a conveyor belt effect where each person has certain metrics and output that they're responsible for.

This structure works incredibly well for outbound sales and is definitely worth a try for your team.

"It's very specialised, everyone has a focus on their role, and they're all ultimately contributing to the engine to drive the end results." - **Nick Roberts**, Alliances and Partnerships Manager, Cognism

cognism

Who should you hire?

When looking to add to your sales team, it's important to remember that you can't just hire someone for the sake of it.

It's incredibly important that your team gels well - the best sales teams succeed by working with each other in a collaborative way, not by working against each other. You need to **hire the right kind of salespeople** - ambitious, creative, resilient but able to work in teams and fit into your company culture.

So, how do you find these people? You start by looking for particular traits and characteristics.

3 things to look out for

At Cognism, we have an organic growth process, where everyone starts as an SDR and is promoted to other roles from there. This means our hiring process focuses on qualities and skillsets particular to SDRs.

What are the primary responsibilities of an SDR? They need to get on the phone, follow cadences and engage with and qualify leads.

What skills/personality traits are needed to carry out these tasks?

- First and foremost resilience - you need people who've overcome challenging situations in the past.
- Always look for overachievement (sporting, academic, or personal).
- Choose individuals who are focused on building their sales skills - they want to progress in their sales career, not move to other areas of the business in a year or two.

In an SDR role, you're cold calling every day and constantly being told "no". You may be surrounded by people who are doing well, while you're struggling to connect. The perfect SDRs are those who rise above rejection and never give up. The characteristics listed above will help you find exactly those people.

Driving the right behaviour - incentives and more

We know from experience, outbound prospecting is hard. For a sales leader, one of the key things is to keep your team motivated. The most important thing to do here is to take a step back and understand what motivates your salespeople.

"Understand what really drives a rep as an individual and incentivise them accordingly - attached value to your incentives. If family time is important to them, reward them with time off. If they're wanting to buy a Harley, give a cash incentive and state that it's to go toward their goal of getting the Harley." - **Collin Waldrip**, SDR Trainer, SalesLoft

Salesloft.

In terms of structuring incentives, micro-promotions with added responsibility at each stage is a great route to go down.

"You'll be surprised by how badly reps want the added responsibility. They want to be a mentor and a team lead and they work for those things." - **Collin Waldrip**

Salesloft.

At Cognism, we found that micro-promotions worked well - putting "Senior" in front of someone's job title, and giving them extra duties such as mentoring junior colleagues, really makes a huge difference to their performance and output.

Cognism also looked again at our compensation model and altered it to compensate on the team's output, rather than on meetings booked.

What does this mean in practice?

Our SDRs are compensated on sales qualified leads, rather than meetings because that is more valuable to our company.

Create a call library to share good and bad calls (listen and learn from these).

Host weekly training sprints.

Assign a mentor to each new joiner and organise weekly 121s between them.

Keep an up-to-date sales playbook and share this with your team.

Set attainable KPIs and ensure your team is aware of personal/company goals.

Create a knowledge base (share competitor knowledge and best practices).

Training your team - how to be the best

The best way to train your people is to share resources and knowledge. Here are six key ways to get your salespeople performing at their peak.

Good company culture

"In a high-performing sales team, culture is really important." -
Nick Roberts

cognism

At Cognism, our team mentality goes beyond sales and while we don't fancy ourselves as the 2003 England rugby team, we did borrow from Clive Woodward and his Teamship rules.

At the heart of Teamship rules is collaboration - if you're going to tell people what to do, they're not going to listen. So, like Clive, we got our team together and created our own rules of engagement.

We got our team to define our culture. Rather than dictating what our culture should be or how we should engage with each other, we asked our team what it meant to work together and how we should operate. Then, we got them to create their own Teamship rules.

Get your team to come to a final agreement on the rules. When everyone is involved in the process, you'll see more buy-in from the team and a better, harmonious working environment.

4 time management hacks for B2B sales leaders

Nancy Newman, Cognism's Assistant Sales Director and **Harry Brown**, Cognism's Salesforce Partnership Manager, share their advice on being a more productive sales leader.

cognism

In the words of Lord Chesterfield: **"Take care of the minutes and the hours will take care of themselves."**

Isn't that the truth?

At Cognism, we understand the importance of time and careful planning. It's how we stay one step ahead in B2B sales and ready to meet any challenge. No one knows this better than two of our expert Cognism sales leaders, Harry Brown and Nancy Newman, who've both got their time management down to a T.

Nancy Newman started as a Business Development Representative, working tirelessly and managing her time wisely, eventually being promoted to Associate Sales Director in under 2 years! She said:

"I made time to train myself and believe that training your sales team can be incredibly beneficial. There is always room for improvement. You need to see training as a way to invest your time for you and the team."

"When you get stuck in your day to day, it's easy to slip into habits – this training will help you take stock and come back to work feeling refreshed and ready to go again."

cognism

Harry Brown couldn't agree more.

He went from Business Development Executive to Salesforce Partnership Manager in 2 years. He puts his success all down to investing in upskilling himself, having the motivation to exceed expectations and his excellent time management skills.

We sat down with the dynamic duo to find out their top time management hacks to help sales leaders become more productive.

1 - The value of mentors

When starting out at Cognism, new team members are given a mentor to guide and train them so they aren't too overwhelmed.

Harry remembers his mentor and how valuable he found their support and guidance. He's gone on to mentor quite a few members of Cognism's outbound sales team, from Sales Development Representatives (SDRs) to Business Development Managers (BDMs).

Harry has this to say about the mentor-mentee system:

"The mentor-mentee system ensures that you're not seen as the only person capable of training, but also gives more senior reps the opportunity to practice their sales leadership roles."

"Both Nancy and I have found it helps the mentor reps improve their overall ability and conversion rates by learning through teaching."

cognism

This is a great system. Not only does it expand the knowledge of the entire sales team, but it ensures that the team can function at their best if someone were to get sick or go on leave.

2 - Dedicate time for your team

It's always important to dedicate time to your team, whether it's simply checking in, going over their expected KPIs for the week, or discussing their concerns and ideas.

For some new B2B SaaS sales leaders, this can be a problem. Sometimes catching up with everyone can get overwhelming, and may keep you from meeting your own deadlines.

Nancy had this to say about managing team expectations as well as your own time:

"It's great to have an open-door policy as this really encourages open communication, but on some days this just won't be feasible."

"Ensure your team is aware of events in your calendar at the start of the day, especially if it will obstruct or delay responses to their questions. Dedicate time with the team at the end of the day, so they don't distract during the day."

cognism

3 - Plan ahead

At the start of each week, take a moment to plan your schedule. Plan your calendar and set up your to-do list to reflect your most important deadlines. This way, you can also remind yourself of upcoming meetings and do any prep that might be needed.

Harry recommends making the most out of your meetings by:

"Create an agenda for meetings via Zoom and send out any prep work or decks needed before they start. This is so people can discuss findings and not the deck itself."

cognism

4 - Learn about calendar blockers

This is probably the greatest time management hack for B2B sales teams!

Calendar blocking means creating events on your Outlook calendar to block out time for all of your routines, work and social events. This is a tip that's been endorsed by leading productivity experts and Nancy finds it invaluable for managing her time:

"I found I could have a to-do list but this wasn't enough. Making sure you combine that to-do list with physical calendar blockers to ensure you can designate that time on one project not only improves your efficiency but also the quality of the work you produce."

cognism

Harry is an advocate for calendar blocking too, but his experience in sales has led him to always think ahead and that means planning for the unexpected. You might have a perfectly blocked out calendar but if an urgent task comes in you're going to have to prioritise it, which is why he offers this excellent advice:

"Expect the unexpected. In addition to setting time aside for your to-do-list, have time blocked for unexpected emails/requests for help/ workload. This can be any time but 30 minutes at the end of the day and an hour on Thursday mornings has worked well for me."

cognism

The no BS guide to booking the right sales meetings

2 of Cognism's SDR team, **Ashley Corlett** and **Evangeline Crossland**, answer our questions about how to book the best meetings with the best prospects.

cognism

Salespeople can be consumed by the thrill of pursuit. A desire to post the highest numbers and book the most meetings - and it's hard to argue with this. Of course more meetings = more sales. This much is obvious. But it can present us with a problem.

Low conversion rates.

If you're finding a high drop-off between meetings booked and closed deals, the chances are you're speaking to the wrong people. This is when a company needs to implement a robust sales strategy - and focus on booking the right sales meetings.

This is the process of lead qualification.

We asked 2 of our leading sales reps 3 questions:

1. How do you ensure that the companies you're speaking to fit our ICP?
2. How do you ensure that you're speaking to the right person at the company?
3. How do you increase the chances of the lead attending the booked meeting?

Ashley Corlett
In August 2020, Ash brought 4 years of sales experience to Cognism's revenue team. He hit the ground running - with multiple SQOs and a Cognism 'Employee of the Week' award to show for it.

Evangeline Crossland
When it comes to Evie's ability to book meetings, her record speaks for itself. In just her second month at Cognism, Evie had a target set of 8 SQOs. She identified 21.

In doing this, Evie set a precedent for exceeding her targets, and her growth since then has been astronomical.

1 - How do you ensure the companies you're speaking to fit our ICP?

Ensuring that the leads entering the top of the sales funnel fit your ICP is the easiest way to increase your conversion rate. Your sales reps will have more constructive conversations. This breeds a culture of confidence and success.

Clearly define the ICP

Depending on where the leads are coming from, the level of qualification needed varies. However, a good understanding of the ICP should always come from the top.

"Cognism Sales Director, David Bentham, uses data to identify our total addressable market. He then uses this information to build contact lists in Prospector, and distribute them to the sales team. This keeps us all on track - whilst saving us the 2-3 hours salespeople usually spend each day trying to find contact information. For a salesperson this is the golden egg." - Ash Corlett.

cognism

Whenever the ICP changes, this should be decided on by the senior sales team, but it should immediately be shared with all revenue staff at the company. The Sales Director navigates the landscape, but it's the sales and marketing teams who direct the ship.

ABM

An account-based approach can also facilitate intelligent lead generation. This is a more flexible way for a salesperson to explore new opportunities without straying outside of the ICP.

"I often take a look at our major customers in Salesforce, and ask myself 'what makes them a good fit?' If you can answer that question, then you can start looking at similar companies. You already know the problem your product could solve. This makes it that much easier when you get on the phone." - Ash Corlett

cognism

Check out prospects on LinkedIn

Evie holds a bespoke sales role within the Cognism team, as the Marketing Development Representative. This means there is more variation in the type of lead she deals with, as a whole range of people will download marketing content. For this reason, more qualification is required.

The first thing Evie does before reaching out is to look up the prospect on LinkedIn.

"You can do a lot of your qualification through LinkedIn. The first things I look for are whether the company size fits our ICP, and whether they operate in a country which fits our ICP. This takes minutes and could save you a lot of time on the phone." - **Evie Crossland**

Qualify on the cold call

After checking out a prospect on LinkedIn and confirming that they fit our ICP, it's time to make an effective cold call. The first few questions you ask should help you to understand whether they'd benefit from your offer. Waiting until later to ask these questions will waste your time and theirs.

"As an MDR I already know a bit about the prospect's interests, as they've made a download. Part of the qualification process is already done, but you still need to make sure. Most of the time people like to talk, so I ask the right questions and give them a good idea of what we do. Be honest about your proposal and try to find a real way in which it could help them." - **Evie Crossland**

2 - How do you ensure you're speaking to the right person at a company?

There's no single right answer for who you should speak to at a company. It depends on the company size, who will benefit from your product and how busy they are at the time. Landing in the right inbox often requires a little SaaS sales investigative work.

Bottom-up

If you're unsure about who to contact within a company, the bottom is a good place to start. There are two main reasons for this:

"Quite often we will start by speaking to a more junior member of staff. You need to use that to your advantage. Learn a bit about the business and then find the decision maker, say to them 'some of your team have been engaging with our content and I thought I'd introduce myself.'" - **Evie Crossland**

You can also encourage positive internal conversations.

"Ultimately what you want is for them to get the boss on the call. However, you can still have great success with a less senior member of staff. If you can get them excited about your offer, they're more likely to have a positive conversation internally. This can be more valuable than any sales call." - Evie Crossland

cognism

Multi-threading
Building a relationship with multiple people in a company is known as 'multi-threading'. Through this process you build hype around your offer by getting multiple people speaking about it.

"Encouraging internal conversations about your product can be more effective than conversations between a salesperson and a buyer. It's a much more organic way to get a good foothold within an account and it paints your proposition in a positive light." - Ash Corlett

cognism

The downfall of this approach is that managing outbound sales at scale reduces your ability to run a highly customised outreach. If you already know who the best person to contact at a company is, reach out to them individually.

3 - How do you increase the chances of the lead attending the booked meeting?

For a numbers-driven salesperson, the SQO is the end goal. Booking a meeting is a victory, but the journey doesn't end there.

Now, the salesperson is presented with an opportunity to go the extra mile. How can they increase the chances of getting the lead to attend the meeting?

Multi-channel engagement
Everyone you'll speak to has a preferred means of communication. Some will prefer an email, whilst others will prefer to exchange voice notes. Cover your bases and use a multi-channel prospecting approach. It massively increases your chances of your message being heard.

"At the start of my process, I always connect on LinkedIn. I'll send a message to confirm our meeting, and give them an opportunity to send over any questions they have in advance. I'll also ask a lead what their preferred means of communication is. This shows you care about their preferences and increases your chances of good engagement." - Ash Corlett

cognism

Here's a good statistic about this:

"More than 70% of salespeople who use social media networking in their sales process outperform their peers who don't." - Resourceful Selling

A multi-channel approach also helps you to stand out from the crowd. This is very important to Ash.

"We send voice notes, videos, direct mail. This week I sent someone a message on LinkedIn asking 'Why do you wear Sennheisers rather than Bose?' , referring to his LinkedIn picture. We had an interesting conversation and it turned into a pitch. Sending repetitive messages is boring for the salesperson and the lead, I don't get why people do it!" - Ash Corlett

cognism

Be assertive and get something in the diary

If you leave a sales call open-ended, the chances of attendance plummet. **'Always be closing'** might be slightly excessive, but at the end of the call - close it.

"If you call someone and they say 'call me later', put a time in the diary, and send a calendar invite. Also, be assertive! The minute you start sounding desperate, the prospect will turn off. Say to them 'Let's put in a time for a meeting, when are you free?' Once you've done that, ask them 'Have you received the invite? Check your junk'. Do whatever you can to make sure you get it over the line!" - Evie Crossland

cognism

Show value at every stage

If a prospect isn't gaining anything from your conversations, they'll lose interest…fast.

"I always imagine the prospect asking 'What's in it for me?' If I'm unable to answer that question, I might as well give up. Always give them enough information to be excited about your next conversation." - **Ash Corlett**

cognism

A successful prospect interaction begins with asking open-ended questions. Try to understand the prospect's pain points and offer resolutions.

Another great stat for you:

"69% of buyers said that the one thing they wanted from sales reps was to 'listen to my needs'." - **HubSpot**

Every prospect is different, so every sale is different. Make sure that the value you show is relevant and consistent. If you have access to valuable content, send it through. Even if the content isn't yours, sending over interesting articles and videos shows the prospect that you're thinking of them.

Follow up after your call

Every great call should be followed by a great email. After every call, Ash sends over some more information about the tool. Drip feeding the information in this way keeps the prospect intrigued.

"Sending over additional information adds value and reinforces the points you've discussed. It also reminds the prospect of what you covered, making the next call much more impactful." - **Ash Corlett**

cognism

Evie has the advantage of knowing what kind of content the prospect is interested in, as they've already downloaded another document.

"I save similar groups of content together so I can send it to the prospect ahead of the next meeting. It shows that I've been listening in our conversations, and I'm putting in effort to show them value. This is far more effective than pestering someone for a demo. Be personable, realistic and memorable - make their buying experience a pleasant one." - **Evie Crossland**

cognism

8 skills that make a successful sales rep

Cognism SDRs **Sam Gibbons**, **Jennifer Gray** and **Evangeline Crossland** discuss the top skills that every sales rep needs to make their job easier and more successful.

cognism

Sales development representative (SDR) - an exciting and challenging role that can generate feelings of satisfaction and accomplishment, when done right.

When done wrong, it can leave people feeling demoralised and dejected.

Luckily, help is at hand. These are the 8 essential SDR skills - from Cognism's very own sales reps.

1 - Taking the initiative to research and learn

Do you know what impresses people?

Research.

When you're speaking to a prospect for the first time and you mention something that shows you've done your homework, they'll be more than impressed, they'll be sold!

Jennifer Gray finds that if she conducts her own research on a prospect, she can pair those insights with the data she has on hand to cold call successfully:

> "Do a bit of research in advance to connect with the person on the phone. They'll be happier to talk to you if you come across as knowledgeable and friendly so find out as much as you can before you cold call."
>
> cognism

She recommends being aware of your prospect's job title, industry and location to start. Plus, knowing when the best time to call is a bonus because there are certain times of the day when people are happier to accept cold calls, and times when it's just not convenient!

What happens if you don't do your research?

Your lack of knowledge might just trip you up and lose you the sale. Research helps you build a relationship with your customer; if you call them by the wrong name or don't know their current job title, you come across as being sloppy, and no one wants to work with a sloppy sales rep! They want to work with an expert who can help them.

Which brings us to our next point:

It's not only about researching your prospect, but knowing your own product better than anyone else. You don't want to be overzealous when it comes to selling it, but when you know what you bring to the table, you'll be able to offer your prospect a solution to their problems and add value to their business.

That's all anyone really wants in the end - an easy solution to a time-consuming and possibly expensive problem.

2 - Actively listening when cold calling

If a prospect is met with a cold call that immediately comes across as scripted, they'll probably hang up on you.

To be a successful B2B sales rep you need to master the art of actively listening to your prospect and having a human conversation with them.

Jennifer enjoys being able to finally put a voice to the data profile she's been researching. The trick is to keep her prospect engaged and interested in the conversation without sticking to a script and coming across unempathetic or robotic.

To prevent this, she chooses to actively listen:

"Listen to the prospect and what they have to say. It helps you build rapport on a cold call. Take note of the prospect's pain points & use them to open up conversations to help them."

cognism

What's more, by actively listening you can judge whether your prospect is right for you or not. This will save you time in the long run. You won't reach the end of the funnel and only then realise your prospect was the wrong target for your product.

3 - Getting straight to the point

When Sam Gibbons started at Cognism, he wanted to be every prospect's best friend:

"I'd always ask, "how are you?" and take far too long getting to the point! As an SDR, you need to remember you're interrupting somebody's day. You'll come across as more assertive and your clients will appreciate it if you get straight to the point."

cognism

According to Time, a 2016 study by Microsoft states that the average person now has an attention span that's a second less than a goldfish:

8 seconds.

That means you have 8 seconds to engage with your prospect and explain why you're calling.

Sam feels you need to be direct. Over time you can build a rapport with your client, but for that initial call, time is of the essence. He recommends:

"Lead with something like: "NAME, this is Sam from Cognism. I know you weren't expecting me to call you, do you have 30 seconds for me to explain why?"

cognism

4 - Keeping track of your opportunities

Organisation is what will set you apart from the average rep. If you want to be successful in SaaS sales, manage your time and keep track of your workflow.

Sam swears by 4 time management hacks that help him have more time to focus on closing his outbound sales and avoiding stress. His top tip is to stay on track of the meetings you've booked:

"When you book a meeting, log 'ACCOUNT NAME', 'PROSPECT NAME', 'DATA BOOKED', 'DATE FOR', 'ATTENDED?', 'SQO?' (or whatever your term is for a qualified opp), 'IF NO SQO, WHY?', 'NEXT STEP' on an excel sheet. This will give you full visibility of all of your opportunities, allowing you to forecast each month, chase when needed, and understand why your failed opportunities are failing."

cognism

5 - Get creative with your outbound

It's not just about having the data. A successful sales rep knows how to go about converting leads into sales and to do that, you often have to get creative!

Sam finds that he gets the best results when he adopts a multi-channel approach that includes many outbound sales tactics such as email, phone, LinkedIn and even text and video. He says:

"Ensure you're utilising these channels for at least 15 touch points per contact/lead. The more creative your outreach is, the more traction you're likely to receive (especially when selling to other salespeople,) which is why video is so effective."

cognism

6 - Be willing to work hard

The role of an SDR is not easy. It can be both a demanding and incredibly satisfying career path, but to achieve SaaS sales success you need to have the right mindset and be willing to work hard.

Evangeline Crossland joined Cognism in February 2020 and was promoted to Senior SDR in July. She truly understands the need to stay productive, come up with solutions and work tirelessly to hit quotas. She has this advice to offer:

> "You get out what you put in. You need to stay active to get results. The more conversations you have, the more meetings you book, the more SQOs landed, the more commission you'll get!"
>
> cognism

7 - Make mistakes, ask for help and never stop learning

If there's one thing Evangeline knows, it's that you can never be too experienced! Which is why she says:

> "Since I started in sales, I've never missed a training session with my team because I know I can never know everything and there's always going to be room to grow. My advice to other SDRs is to take every learning opportunity you are given!"
>
> cognism

It goes to say with all SDRs - learn, learn, learn!

The industry is always changing and you need to change with it if you want to stay successful in B2B sales prospecting.

And at the same time remember: it's okay to make mistakes.

Part of learning and growing as an SDR is owning your mistakes and using them as valuable lessons. Evangeline says:

> "Don't be too hard on yourself if you make a mistake. Messing up is how you learn, so don't be afraid to get things wrong and grow with each mistake."
>
> cognism

But, if you find you're making quite a few mistakes, it's okay to ask for help too. Sam found the help of his colleagues to be invaluable when he started out. They offered outstanding support and helped him stop any bad habits from forming at the start:

"The more you ask for help from your team, the more unbiased feedback you'll get. This is so important when you're starting out, as it's so easy to pick up bad habits when it's integral that you're picking up good ones."

cognism

8 - Stay positive and don't take things personally

Rejection is expected in sales, but that doesn't mean you need to dread cold calling.

Yes, you get some rude prospects and you get some who slam the phone down on you. The main thing is:

DO NOT TAKE IT PERSONALLY.

Evangeline has been through it all - bad conversations, being spoken down to, you name it - but through it all, she remains positive:

"Whenever I have a bad call I try and stay positive and I pick my phone up and try again because I can just hear David Bentham's voice in my head saying, 'one call can change your life!'"

cognism

Top SDR tips for winning sales

A panel of Cognism SDRs share their 10 tips for sales success in 2021 and beyond.

cognism

The most important part of B2B SaaS sales is closing the deal, right? Or is it though?

To get to the part where the client actually signs and you close the deal, you need a lot of help along the way - that's where SDRs come in! Your lead generating gurus, who face more rejection than success, qualify your leads, and set-up meetings and demos - SDRs do a lot more than just chat to people on the phone all day!

Cognism's SDRs

Cognism is proud to have an incredible outbound sales team behind us, who identify and create sales opportunities. Naturally, we had to chat to some of the best in the biz to learn just how they got us from $0 to $10 million ARR.

Meet the team

In our very (un)biased opinion, these are the best of the best! Here's who we chatted to for the inside scoop and top tips for winning at B2B sales.

- Annabel Jones - Business Development Executive
- Ashley Corlett - Business Development Executive
- Oliver Scampton - Sales Development Representative
- Hattie Pursell - Business Development Executive
- Jenny Gray - Senior Business Development Executive
- Ollie Pleasants - Sales Development Representative

And these were their top 10 sales hacks:

1 - Understand your customers

"You must understand your value proposition by understanding how your current customers use your platform." - Ashley Corlett

cognism

To get it right, use your customers' insights for your outbound prospecting. Talk to your Customer Success Team and learn from your happiest customers.

2 - Smile and dial

"Enthusiasm, energy, and smiling - lots of smiling...it's been the single best way for me to build rapport and, in turn, book a meeting." - Annabel Jones

cognism

On her most positive calls, the feedback Annabel has had was really a testament to the "smile and dial" phrase you may have heard floating around.

Smiling…over the phone? It might sound strange, but Annabel has genuinely had prospects tell her that they love that they can tell she's smiling when speaking, without even seeing her face!

When you smile, your prospect smiles with you, they may even laugh (at you or with you – it doesn't matter).

Getting your B2B prospects to laugh makes them forget about their job title, relax, and forget that they're being cold called.

They're immediately interested in what the silly person on the other end of the phone has to say, as we all just need a break from the pressures of work sometimes!

95% of the time as an SDR, you're going to get told "no" – so always project positivity and warmth. Go into every cold call upbeat and confident. If you sound unhappy or disinterested, your prospect will pick it up.

3 – Listen, don't talk

"Active listening books meetings!" – **Jenny Gray**

cognism

When cold calling, work on your active listening and let the prospect do most of the talking! This allows you to understand their needs, address them, and book more meetings.

4 – Leverage online video

"It makes prospects value you and your time more." – **Hattie Pursell**

cognism

Using video humanises a cold message, puts a face to a name, and makes you stand out in a crowded inbox – everything you want and more as an SDR!

So, why wouldn't you use it?

Block out some time in your calendar every day to record some personalised video messages.

5 - Send voice notes on LinkedIn

"It's an easy and time-efficient way to get your personality across and it really works for me." - **Ollie Pleasants**

cognism

Sending voice notes to prospects on LinkedIn is a great alternative to a cold connection message, or sending a scripted message via InMail.

The benefit of using voice notes during your LinkedIn prospecting?

It personalises your outreach. The prospect can get more of a feel for who you are, and trust and rapport will grow more quickly.

6 - Remember your ABCs...

"ABC - always be closing!" - **Oliver Scampton**

cognism

The number one goal for an SDR is to close - stay focused on it always!

If a prospect says they're not available or "Now's not a good time", simply reply with:

"Okay, no problem, when works?"

Then send across a calendar invite, and let the prospect know you're looking forward to chatting with them. Always try to turn an objection around and get that meeting booked!

7 - Prospect to companies, not people

"Hot tip for SDRs: prospect to more than one person at an organisation." - **Ashley Corlett**

cognism

It's likely that the first person you speak to may not be the decision-maker at a company you're trying to sign.

However, they're likely to be able to point you in the right direction and give you valuable information.

You can then tailor that information to the company's needs, and use it when you do get in front of the decision-maker.

8 - Work incredibly hard

"Learn to improve...constantly." - **Oliver Scampton**

At the end of the day, B2B sales prospecting is a numbers game - the salespeople with the highest activity are more often than not the top performers.

Keep busy, push yourself to your limits...and then push beyond them! Call as much as you can, take notes and record your calls. Listen back to your best and worst calls. What did you do right, what did you do wrong? Get into a constant cycle of learning and improving.

9 - Keep on top of your admin

"Make detailed notes so you don't forget anything!" - **Oliver Scampton**

Part of being an SDR is being incredibly organised with your sales admin. Set tasks for yourself, use plenty of Post-Its, and remember the small details - they make a huge difference in closing a sale.

10 - Never give up

"Persistence is key. If you make 100 dials a day and don't speak to someone, keep going, it will happen." - **Ashley Corlett**

The hardest part of being an SDR in SaaS sales is the constant rejection you face; the most rewarding part is closing those deals.

If you're having a bad week, don't give up. If you've had 100 bad calls in a row, don't throw in the towel. The next one you make will change your life. All you need to do is pick up the phone…

Time management hacks for B2B sales reps

Earlier, you heard from the generals - now it's time to hear from the footsoldiers! How can SDRs maximise their time and be more effective at selling?

Time management isn't just about getting things done faster…

It's a combination of prioritising your most urgent tasks and executing them effectively. This is the mark of an elite salesperson.

For the less experienced sales rep, the busiest day of the week is always tomorrow.

We spoke to **William Gay**, an impassioned Cognism BDM who has reduced B2B sales to its basic elements and refined his processes to an astonishing degree. Having booked an average of 104 meetings per month through the height of the 2020 lockdown, Will is - in a word - efficient! He told us:

"For me, time management is the single most important sales skill. Managing your time effectively allows you to not only achieve your targets, but overachieve."

Starting out as an SDR

Life in SaaS sales wasn't always easy for Will. He started out feeling much the same as most salespeople taking their first steps: a little overwhelmed.

"When I started I had post-it notes all over my desk. I was finding it hard to keep up and ended my first month by hitting 10% of my target. This wasn't good enough. The following quarter I achieved 143% of target by working hard and becoming more efficient."

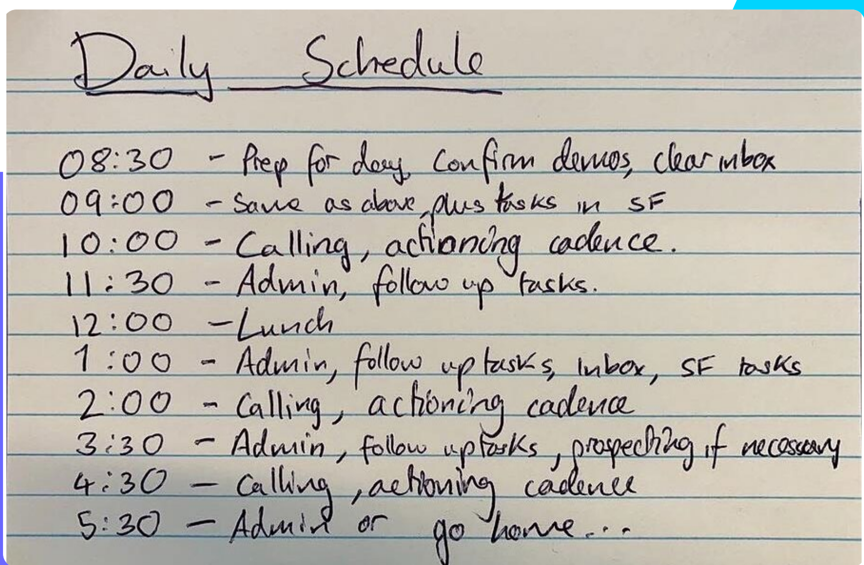
cognism

Will's transition began with a commitment to his development and one simple exercise: planning out his day.

"I blocked the day into actionable chunks. The brain doesn't like hopping from activity to activity. The more effectively you can block your day into manageable tasks, the more easily you can get into a rhythm."

cognism

For the next few months, Will had this plan Sellotaped to his desk.



"With this structure, I was spending less time making cold calls, but making more cold calls than the other SDRs. It was so helpful for me to always be able to look down and remind myself of exactly what I should be doing."

cognism

Will's time management hacks

Will has come a long way since his first month at Cognism. He has moved quickly up the ranks and even ran an efficiency workshop based on what he learnt. Here are his 7 key time management hacks:

1 – Keyboard shortcuts

"Learn them. Blocking off your time is vital, but you still need to be efficient. These ones have really helped me."

cognism

- Cmd + L - clicks and highlights the text in the URL bar.
- Cmd + F - searches anywhere on the screen for a keyword.
- Cmd + X, C and V - cut, copy and paste, respectively.
- Cmd + alt + shift + V - paste text into an area in the same format as the area.

"Using your mouse takes much more time. Learn the keyboard strokes and you'll get the less interesting tasks done much faster, giving you more time to focus on what matters most... selling!"

cognism

2 - Find shortcuts for repetitive actions

"If you find yourself regularly repeating a task, find something that shortcuts that task. I recently found a tool called aText. If you regularly write the same sentence, you can save it. When you next write the beginning of that sentence, aText will find the sentence and input it for you."

cognism

Will also mentioned using Grammarly to quickly check his emails. If there's technology out there which will speed up your process, use it. Don't slow yourself down with unnecessary work!

3 - Take notes

"Assume you will remember nothing and write everything down. Always take great notes; this will help you to remember more actively."

"Also, keep your notes organised. I use OneNote to categorise my notes, and I'm now able to quickly jump back and check them in no time at all. Good note-taking and organisation practically eradicate the need to remember anything!"

cognism

4 - 30-minute daily preparation

"When I was an SDR and an MDR, I'd spend the first half-hour of every day preparing and setting reminders on my computer. This was how I stayed organised and on track. This process will put you in the right state of mind for work, while reminding you of your daily tasks."

cognism

Often, salespeople try to speed up by diving headfirst into a big pile of work at the start of their day. The more things I do, the more effective I become! Usually, this approach isn't effective and only results in unnecessarily wasted time. Instead, plan out your sales strategy at the beginning of your day and space out your tasks evenly.

5 - Follow the right people on LinkedIn

First, it should be noted, we don't recommend spending too much time on LinkedIn looking for inspiration. LinkedIn "research" could be considered professional procrastination. That said, LinkedIn can help you to discover some innovative ways to step up your sales game.

"Follow everyone who is putting out good content on LinkedIn. Substitute all your Instagram and Facebook time for LinkedIn and optimise your intake. Don't do this during working hours though!"

cognism

6 - Use a CRM or sales engagement tool

In fact, use the best CRM and sales engagement tools you can afford. Find one which solves the challenges you face, and use it! Sales technology will make your job so much easier.

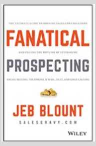
"I'd recommend using a tool like SalesLoft. So many companies don't use a sales enablement tool. It means you have to log every single task, move it, update it. A good CRM drives sales growth and forces you to be consistent in your actions.

cognism

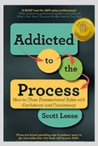
Investing in the right software will vastly reduce the number of manual activities you have to complete, and will free up a lot of your time.

7 - Read books that inspire you

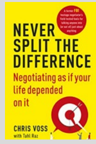
Will is a big fan of Audible, as it allows him to use his time off to feed his appetite for knowledge. While reading books can't directly save you time, investing in your personal growth ultimately can. Will named a few books which have inspired him to develop in his sales career.



Jeb Blount, Fanatical Prospecting – this is a great read for people starting out in sales.



Scott Leese, Addicted to the Process – a short, adrenaline-fuelled read.



Chris Voss, Never Split the Difference – according to Will, the best sales book of all time.

Part 4: Sales metrics

What is lead conversion rate and how do you calculate it?

Michael Hanson is a sales metrics and optimisation expert. We asked him for his advice on calculating conversion rate for B2B sales.

GrowthGenie

Door-to-door sales might be considered the most rudimentary way of selling. But, ask any travelling salesperson for some tips, and they'll have an answer: **"Avoid X street, they don't buy anything."**

This is the most basic form of sales data there is. These people don't buy our stuff, let's not talk to them.

Sales data has come a long way since then. Today, the top **24% of sales teams** are 1.5 times more likely to base forecasts on data-driven insights.

Breaking down your sales strategy into measurable chunks will make it easier to review and optimise your processes, and improve as a result.

Michael Hanson, the Founder of **Growth Genie**, knows this better than anyone. While scaling CloudTask from 5 to 200 employees in just 3 years, Michael realised that without proper management and provision of the right information, SDRs couldn't unlock their full potential.

Since then, Michael created Growth Genie.

"Growth Genie helps companies build repeatable, scalable outbound processes. We provide teams with playbooks and cadences - such as our infamous 30 touch outbound cadence - and offer hands-on training and coaching. Our long term involvement in the implementation of robust sales processes makes us more like consultants than standard training providers."

GrowthGenie

We spoke to Michael to get his insights into the world of B2B data and process optimisation. Here are his thoughts.

What is a lead conversion rate?

There are many types of conversion rates. Their value varies from company to company.

"Lead conversion rate can mean a lot of things. It depends on what you're trying to measure. You can measure the rate at which website visitors convert to MQLs (marketing qualified leads), MQLs to SQLs (sales qualified leads), SQLs to closed deals, or even the whole thing, cold leads to closed deals."

GrowthGenie

The different types of performance metrics give companies the flexibility to find one which works for them. Growth Genie helps B2B sales teams to find the right ones and implement them.

"Each company will define lead conversion rate differently and focus on different areas. You can even get really granular with the conversion rate you measure. The deeper you go, the more nuanced the performance metrics can get."

GrowthGenie

Why is it important to measure your lead conversion rate?

Data is the most reliable source of performance feedback. It doesn't lie. It doesn't care about your feelings. Implement it into every aspect of your outbound sales process and you will have a newfound understanding of your strengths and weaknesses. It's not always pretty, but it helps you improve.

"It's a good way to measure your performance: marketing, sales or the alignment between the two. SDRs could just look at the number of meetings they book each month, but this won't show them the full picture. If you book 100 meetings and none of them convert to closed won, it's kind of irrelevant. You need to look at the SQL volume as well as the conversion rate."

And this isn't the only use.

"Measuring performance also shows you where the gaps are. You can see which stage of the sales funnel isn't functioning well, and you can focus on fixing it."

How does measuring the lead conversion rate help B2B sales teams?

Understanding your conversion rate will help you to identify the areas of your B2B lead generation process that need improvement. The next step is using this data to optimise your processes.

"The lead conversion rate is just a metric. Metrics are important, but too many sales leaders focus on metrics alone. The problem with metrics is that they tell you what, but they don't tell you why. You still have to do your own research to improve your processes."

This is also the case when you want to find out what is working well. All too often teams prioritise fixing faults over identifying strengths.

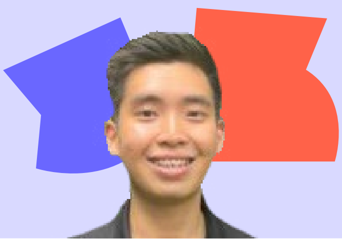
"Once you've calculated a conversion rate, you need to work backwards to identify the cause. If you spot a decrease or increase in performance at a particular stage of the sales funnel, investigate your calls, messages and replies to either fix something which isn't working, or double down on something that is."

How to calculate the conversion rate

The great thing about modern technology is that you don't really need to calculate anything; you just need to find and interpret it.

"Adopt different types of technologies. CRM technology can help at the bottom of the funnel. Sales engagement tools can help at the top. I'd recommend either outsourcing a sales operations consultant or hiring one internally - someone who can review all of the conversion rates and turn them into actionable insights. This is particularly important as you grow and things start slipping under the radar."

How to improve your sales conversion rate



Nigel Seah, Digital Marketing Executive at Novocall, asked his sales team for their insights into improving conversion rates.

When it comes to improving sales conversion rate, it's essential to keep in mind the B2B sales and marketing funnels.

Conversion only occurs at the bottom of the funnel. People at this stage are those who:

1. Are aware of their business problem.
2. Have done their research on the variety of solutions available.
3. Are ready to make their purchase.

Prospects higher up in the funnel aren't ready to convert yet. And because of this, your tactics to drive conversions will inevitably change across your funnel stages.

Let's not forget that your marketing and sales strategies can be further divided into inbound and outbound methods.

How then can you improve sales conversion rates? Here are 14 insights.

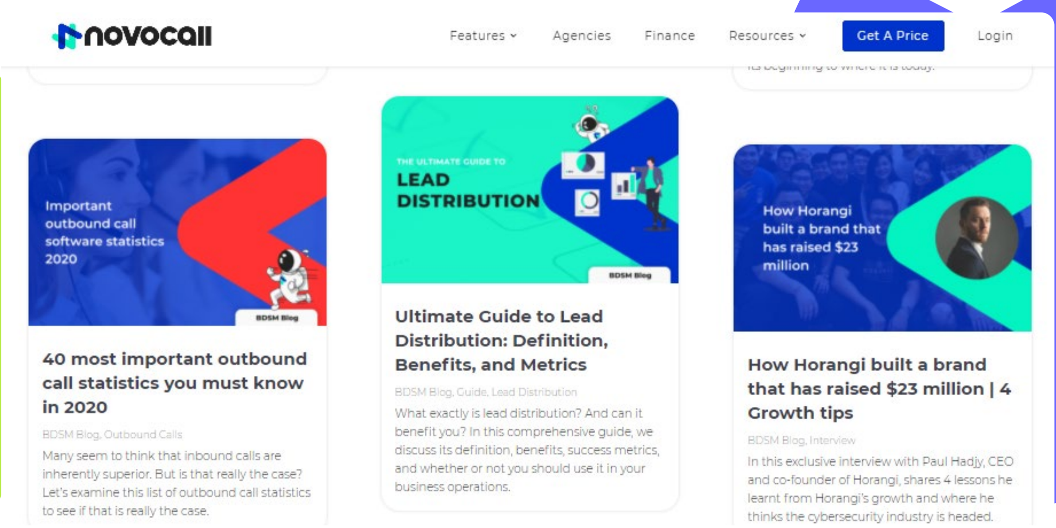
Inbound conversion

Content strategy

1 - Invest time and effort into a blog

Having a blog on your site is one of the most important aspects of a good inbound strategy. Your articles should talk about your product or service and industry trends, as well as provide helpful guides for your readers.

An example of a SaaS company's blog. Source: Novocall



Having good content on your blog helps you achieve several things.

Firstly, it helps you establish your brand as a thought leader in your field. This builds the level of trust your readers and potential leads have in you. It also creates the impression that your brand is one that is genuine in offering help to your readers and prospects.

Content marketing can help make your business one of those "top-of-mind companies" that prospects will think of when looking for a solution to their problems.

2 - Create the appropriate content for the right audience

As we established right at the beginning, your strategies will vary based on the funnel stage your audience is in.

Those at the top of the funnel (TOFU) - or the awareness stage - are looking for more general information and might not have identified their business problems yet. For them, blog articles like industry trends, statistics, and general guides are most helpful.

Meanwhile, those at the middle of the funnel (MOFU) - or consideration stage - are already aware of their business problem and are looking out for solutions. For them, articles that compare software are the most useful to them, as they can review the features for themselves.

Note that those at the TOFU and MOFU stages aren't looking to purchase just yet. Your goal when planning out content for them isn't just to improve sales conversion, but to educate.

3 - Optimise your content for search engines

So you've got a nicely designed blog page. You've got great content that can help answer the questions your intended audience might have.

But what good are these when no one can find your blog?

That's why your content needs to be optimised for search engines. When coming up with your content strategy, you must also think about your audience's **search intent**.

Ask yourself this: what kind of content or words are my audience searching for? You will need to engage in some **keyword research** before even starting to write.

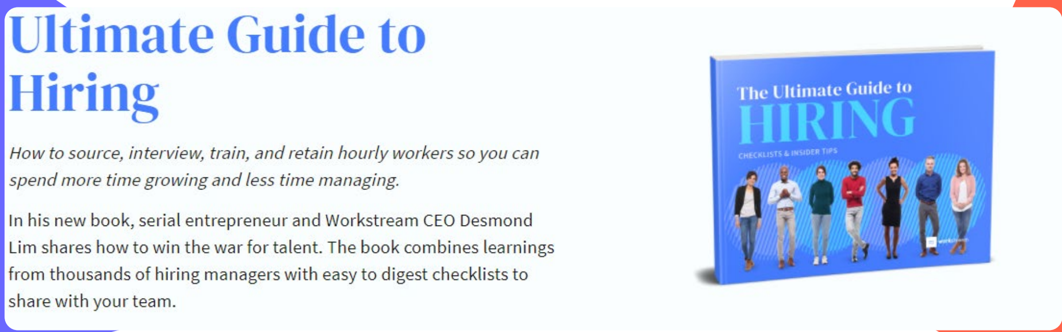
Backlinko has a **comprehensive guide** on how to rank higher on Google.

Top tip: you should start optimising content that targets those at the bottom of the funnel (BOFU). Since these people are most likely to convert, optimising these articles helps improve sales conversion.

4 - Create gated content

We highly recommend that you create gated content. As its name suggests, people who want to read the content have to pass through a 'gate'. In this case, a lead form.

An example of a landing page created just for gated content. Source: **Workstream**

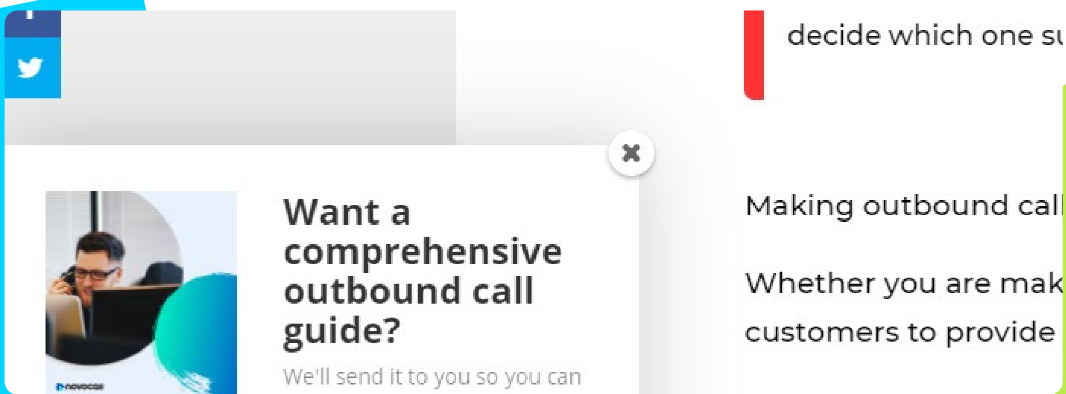


You can even create unique landing pages for your gated content and embed a lead form onto it. This way, you create an incentive for those who want to read your content to provide you with their contact details.

5 - Add pop-up forms onto your website

And why stop at just a landing page? You can even create pop-up forms and have them show up on certain pages.

An example of a pop-up form for gated content. Source: Novocall



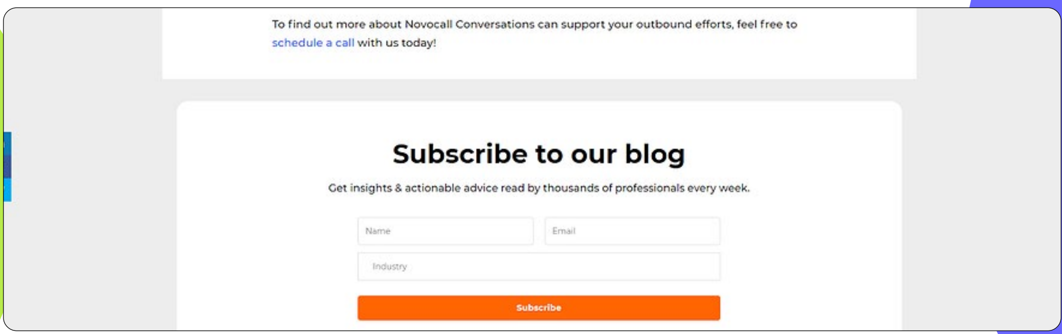
You can use pop-ups to inform your site visitors of the exciting new content that you just published. The more conspicuous your pop-up forms, the more likely people are made aware of the great content you have, and the more likely they'll download it.

This, in turn, improves sales conversion.

6 - Make it easy for your blog's readers to subscribe

Apart from a pop-up, you should also create a subscription box for your site visitors to subscribe to your newsletter. This is another great way to convert your prospects into leads!

Big, conspicuous subscription boxes can catch the attention of your site visitors!
Source: Novocall



Make sure your subscription box is big and clear! This makes it easier for site visitors to notice it.

7 - Use convincing copy on your opt-in forms

And while we're on the topic of subscription boxes, the copy you use on the boxes also plays a role in convincing site visitors to give you their contact information.

Focus your copy on the value you can deliver to them.

For example, if you are a sales automation software company, your copy should focus on how you can help them improve their sales. You could say "Receive FREE weekly expert advice on how to improve your sales".

8 - Distribute your content

While you should invest heavily in a good content and **SEO strategy**, you shouldn't only rely on that to get people to read your content.

Rely on other channels, such as your social media platforms, to advertise your content to your followers.

Also, get your colleagues to leverage their networks and share your content on their profiles!

This makes sense, especially on B2B-centric platforms like LinkedIn, where people often have more connections than companies. The greater your outreach, the greater the likelihood of someone reading your content.

And if you share more content designed to convert people, the more likely you are to drive conversion rates.

Ads strategy

9 - Use digital ads

Wait, aren't ads outbound? Well, not all of them. In fact, some of them even utilise the same logic as SEO strategies.

Enter **Google Ads**. It's an advertising system in which advertisers bid on certain keywords to get their clickable ads to appear in Google's search results. While it's still an ad, it relies on your knowledge of your audience's search intent to drive conversions.

Outbound conversion

Outbound calls

10 - Conduct pre-call research

Conducting research should be a pre-call ritual.

Without research, you come across as a salesperson who's unprepared and possibly even uninterested in the person on the other end of the phone. Imagine being a marketing professional speaking to someone who tries to sell you a product meant for finance professionals.

Talk about a lack of effort!

Your prospects will more likely appreciate the extra effort made to personalise the cold call and may open up more.

Apart from researching your prospects' backgrounds, you should also research the types of questions you should ask. And this brings me to my next point...

11 – Write an outline of what you want to say

Your questions should be thought out carefully in advance, and organised in a logical sequence from the most general to the most specific.

Write up a quick cold calling script that you can reference while you're on the phone. The idea isn't to read from this verbatim but to use it to guide you in communicating your message clearly and confidently.

Remember: the goal of a cold call isn't to pitch to someone on the spot. You're just trying to get them to commit to a meeting at a later date.

12 – Know when to call

No one wants to waste their time cold calling the same prospect over and over. Yet if you're cold calling them at the wrong times, that's just what will happen.

Peak Sales Recruiting says one of the worst times to do cold calling is on a **Friday afternoon**. This makes sense, as, by this point, most people are tuned out. They're waiting out the final few hours of work so they can start their weekends.

Another poor time for cold calling potential customers is on **Monday morning**. Many people open their laptops first-thing and are focused on going through their inboxes. Companies often hold important meetings on Monday mornings, as well.

Then when **should** you call?

Try Wednesday. Cold calls are 70% more successful on Wednesdays. You have two windows: morning or later in the day. If you're an early bird, then try cold calling anytime between **11 AM and 12 PM**. If you prefer the afternoon, then make sure to give your prospect a call from **4 PM to 5 PM**.

13 – Don't give up prematurely

Factors like nerves associated with calling a stranger and high rejection rates can make it exhausting for sales reps when they don't close a deal.

It's no wonder **44% of salespeople** give up after one follow-up call not being successful.

That's a lot of people giving up early! As cold callers, we're not advising you to harass a prospect, but give it more than a single follow-up.

Try four or five times. By being more persistent, you're significantly improving your sales conversion rate. Persistence helps increase conversion rates by up to 70%.

If, at that point, the prospect stops answering, you know to back off. The same is true if they tell you outright they're not interested.

But once you get to that point, you know you've done all you can to win them over and it just didn't work out that time. Onto the next one!

14 – Give the prospect time to talk, too

A successful cold call lasts an average of 5 mins 50 s, compared to 3 min 14 s for unsuccessful calls.

But just because successful outbound sales calls lasted longer, it doesn't mean that the amount of time sales reps were speaking for is the key reason for success.

During that short call, you must also allow the prospect to talk. You should offer a listening ear and learn more about their business needs. The best talk-to-listen ratio for a successful cold call is **55%:45%**. That's almost a 50:50 ratio!

Remember that your prospect is an individual, not just another number in a long line of leads.

Part 5: Sales tech

How to drive growth using CRM software

Workbooks CEO and CRM expert, John Cheney, answered our questions on driving growth with CRM software.

Workbooks.com

In recent years, companies have broken down the walls between their teams and discovered new growth with the use of CRM (Customer Relationship Management) software.

For companies with separate sales and marketing teams, the value of a CRM system is indisputable. According to a study by **Nucleus Research**, the average ROI on CRM software is $8.41 for every $1 spent.

Workbooks provide an industry-leading cloud-based CRM. Their combination of groundbreaking, user-friendly technology, excellent customer support and highly competitive pricing makes them a great choice for small to medium-sized businesses.

We had some questions for Workbooks CEO and serial entrepreneur, John Cheney.
John has over 30 years of experience in the IT industry and can be considered the expert in CRM technology.

1 - Why should an organisation invest in CRM software?
There are several positive outcomes from investing in **CRM software**: revenue growth by finding new customers and selling more to existing customers, improving the customer experience and reducing operational costs – a CRM can help with all these.

A CRM system streamlines business. It leads to better insight and decision-making. Also, with better quality B2B leads, you'll build a stronger pipeline and unlock greater overall growth.

2 - Typically, which departments benefit from using CRM software?
Sales and marketing benefit in the most obvious way, but also customer service and finance. A CRM is perfect for tracking customer inquiries, and you can also integrate customer payments and credit control.

In short, a good CRM should have a positive impact on the whole business.

3 - Why is CRM software essential for a sales team?
First, you have to split your sales team into buckets.

There are the sales leaders – what do they want?

- They want a clear view of their pipeline and to measure the progress and productivity of their SDRs.
- They also want to measure the effectiveness of marketing – what's the quantity and quality of the inbound leads?

Then there are the SDRs – what do they want?

- For them, it's all about productivity and being more efficient at their job.
- They want to be able to manage their workload and prioritise their tasks.

A good CRM should be helping both of these sales groups at once.

4 - How can CRM software help you find and convert the right customers?
The most important thing is for the whole business to agree on what your ideal customer looks like. Then, once you have that defined, you can look at how a CRM can help you reach them.

At the top of the funnel, you want to attract those ideal buyers. CRM software can help here. For example, if your CRM can track **website traffic**, then you'll know which pages are popular and what content people are engaging with. You can use these insights to improve your company's marketing, with better targeting of leads and more relevant content.

Further down the funnel, use your CRM to track the conversion rate. Which types of leads are actually translating into business? Again, use those insights to influence which leads you're targeting and engaging with.

5 - How does CRM software reduce the cost of sales?
One way to reduce the cost of sales is to make your marketing more efficient! It's often overlooked by sales leaders, but it can be a very quick win.

Use your CRM to measure the success of marketing. Which area's performing best – is it PPC, email or SEO? When something's working well, focus resources on that area.

For the sales team itself, productivity is a big factor. The less time your SDRs spend on **sales admin**, the more calls they'll make and the more deals they'll close.

6 - How does CRM software increase sales productivity?
There are three main ways:

1. Salespeople are able to find the information they need more quickly.
2. By being more aligned with sales, it will be easier for marketing to provide warm leads directly through the CRM.
3. Streamlined processes. For example, electronic signing in the CRM, automated order processing...anything that makes your sales team's lives easier!

The main point here is that a CRM system puts everything in the right place.
Any information that you want to share or see can be filed or found, exactly where you'd expect it. This makes research, planning, collaboration and sales strategy that much simpler.

7 - How does CRM software increase upsells and improve customer retention?
The fastest, easiest growth driver is selling more to your existing customers.

Study the transactional data in your CRM to see what they've purchased before, and determine what they're likely to buy in future. Feed that information to your marketing team. They can create content specifically to engage that audience and prove the value of the upsell opportunity.

If you want to improve retention, then you have to look at the customer experience. Analyse the **B2B data** for your customers in the CRM. How many tickets have your customers raised? If it's too many, that's a warning sign.

At Workbooks, we use a traffic light system. If a customer raises a certain number of tickets, they go from green to amber to red. A red rating means it's time to put in place an action plan for that customer. Use the CRM to identify 'at-risk' customers early and you can quickly turn things around.

Also, use regular customer surveys and log the results in your CRM. The best way to find out if your customers are happy is to ask them! After you get the results back, check your CRM data for trends.

A good CRM system will help you to spot areas for improvement before they turn into serious problems.

8 - How does CRM software help to align sales with marketing?
An integrated CRM and marketing automation platform is essential. Both teams should be using the same tech! It's no good having your B2B sales team using a CRM and your marketing team using a different platform – it's best when everyone works together! Growth happens when sales and marketing are on the same page.

If your ICP (ideal customer profile) changes based on sales information from your CRM, it's important that marketing should be able to quickly recognise this and review their content plan. This is an example of marketing and sales using the CRM to create a more efficient workflow.

Instead of talking about the sales and marketing funnel – talk about the revenue funnel! It should be all one funnel, measured by the same metrics and underpinned by the same tech.

9 - What advice would you give to someone thinking about investing in a CRM?
Ask yourself 3 questions – "why, what, how":

1. Why are you looking to make the investment?
2. What kind of business outcome do you want?
3. How are you going to achieve it?

Once you've got the answers, go ahead and invest! Don't get hung up on features or functionality. Instead, find a CRM that provides the clearest route to achieving your goals.

10 - Lastly, why do your clients choose Workbooks over bigger brands like Salesforce and Microsoft Dynamics?

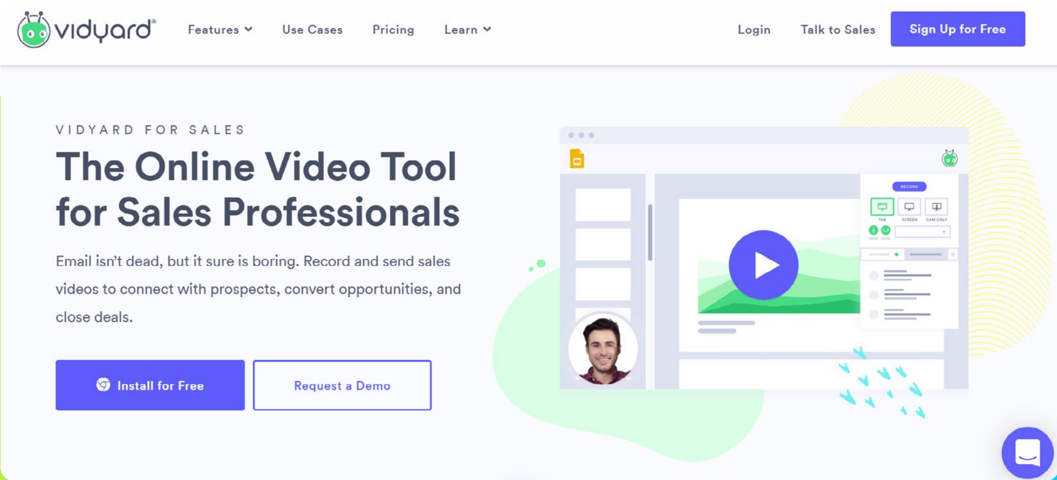
Our customer base is mid-market, so we're a very price-sensitive option – 50% of the price of Salesforce!

We also have a unique onboarding process called "**Shared Success**" – we run workshops with our clients to uncover the "why, what and how" behind their CRM investment. If we think that Workbooks can deliver from them, we implement our tech for free!

Workbooks isn't just a software company; we're a fully-fledged CRM consultancy. Our goal is to build long-term relationships with our customers. I think that's what separates us from other CRM software providers.

15 awesome B2B sales tools

1 - Vidyard



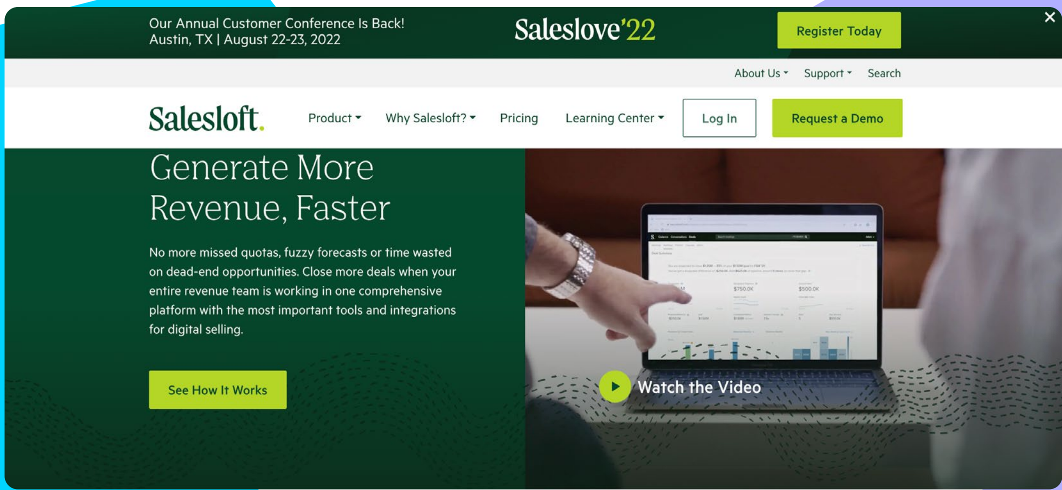
The pioneering online video tool for business. Much more than just a video hosting platform, Vidyard is ideal for B2B prospecting. Salespeople can use it to record and send personalised videos to leads, clients and colleagues.

Jonathan Ilett's top tip for using Vidyard:

"After every demo, send a short bespoke video summary of the meeting. Share it with stakeholders who couldn't attend but have influence over the deal."

cognism

2 - SalesLoft



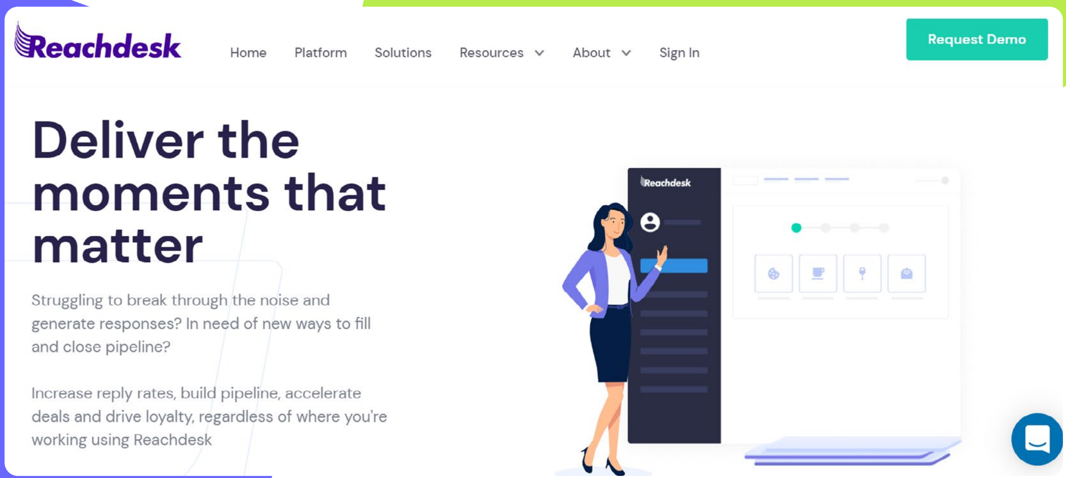
SalesLoft is the top-rated software that helps B2B sales teams close more deals, faster. It provides everything from cadence automation, an integrated dialler for cold calling and powerful reporting and analytics.

Another top tip from Jonathon:

"SalesLoft is great for post-demo nurturing. After you've conducted a demo, create a personalised cadence for the prospect, sharing relevant content. We've seen very high levels of engagement with this approach."

cognism

3 - Reachdesk

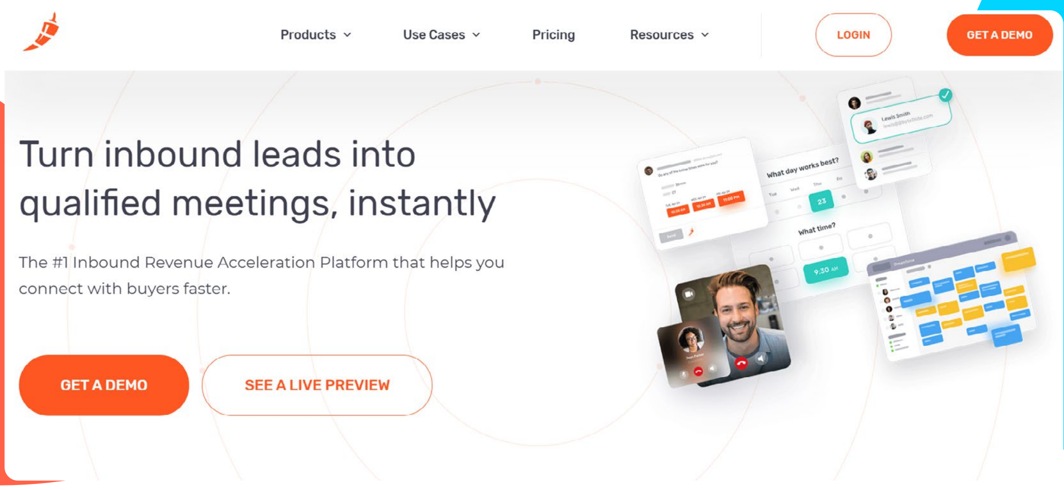


Reachdesk is an innovative direct marketing platform that drives prospect engagement and customer loyalty. Cognism's sales team uses it to send virtual and physical gifts to key stakeholders - anything from vouchers to cupcakes!

Nancy Newman had this to say about Reachdesk:

> "Meeting a new stakeholder for the first time? Why not use Reachdesk to send them UberEats vouchers to enjoy during the meeting? Or to prospects who've returned from holiday, been ill, or had too many on Thirsty Thursday!"
>
> cognism

4 - Chili Piper



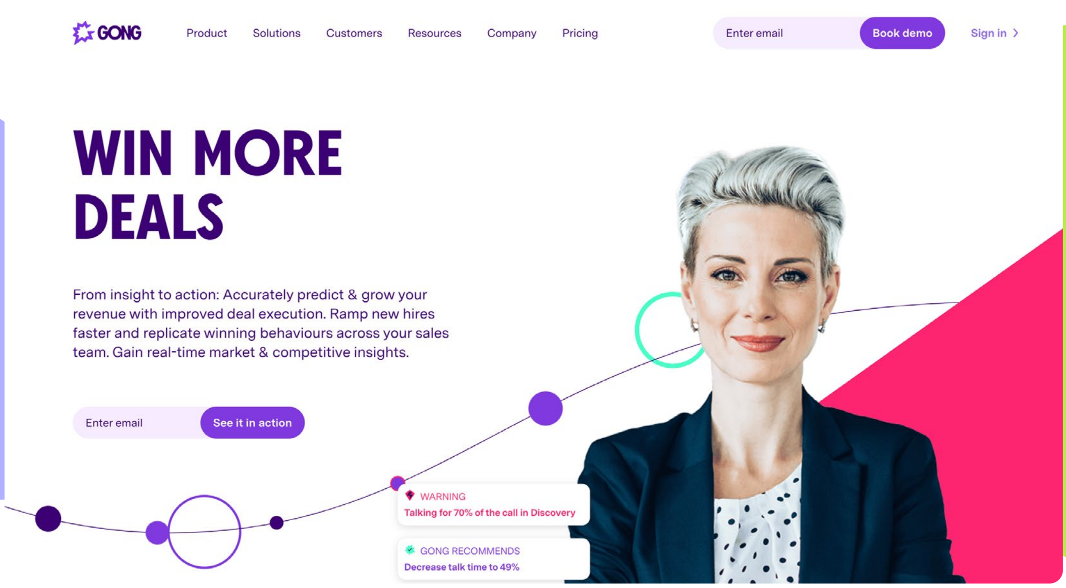
A smart scheduling app that automates and accelerates the booking process, Cognism Sales has been using Chili Piper since the early days. It works by letting prospects book meetings or start live calls with just a single click.

Back to Jonathon for another sales nugget:

"Based on persona and deal size, Chili Piper automatically sorts new opportunities into our enterprise, mid-market or ramping teams. This ensures fair distribution across the board."

cognism

5 - Gong



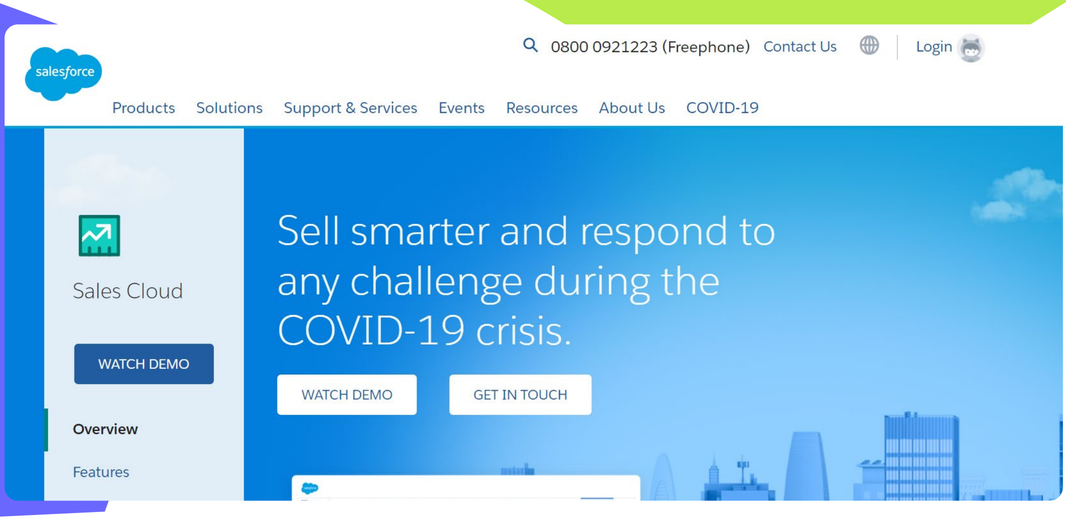
The undisputed leader in revenue intelligence software, Gong is a truly awesome tool for empowering and enabling outbound sales teams. It captures and analyses every touchpoint in the sales process, delivering real-time insights on meetings, calls and emails.

David Bentham gave us a quick tip for using Gong:

"Take snippets from the calls of your high performers and share with those ramping. I've found this results in shorter ramp periods."

cognism

6 - Salesforce



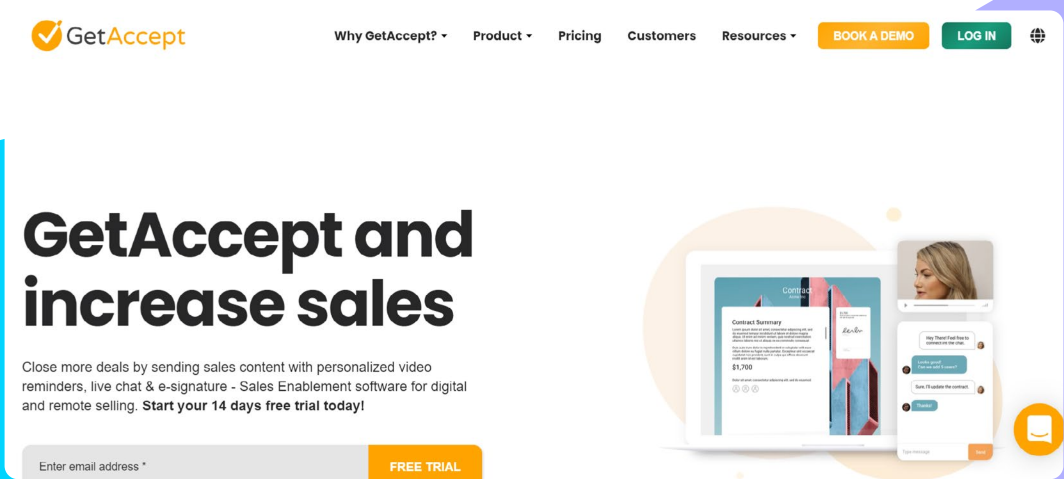
It almost goes without saying, but Salesforce is, without doubt, an absolutely essential B2B sales tool. A global, world-beating player in the CRM space, Salesforce is trusted by Cognism to manage our sales and marketing activities.

Jonathon explains how he uses Salesforce at Cognism:

"Create dashboards that are easy for your team to access and visualise. Consult them weekly, if not daily - this allows you to make quick adjustments and optimisations to your strategy."

cognism

7 - GetAccept



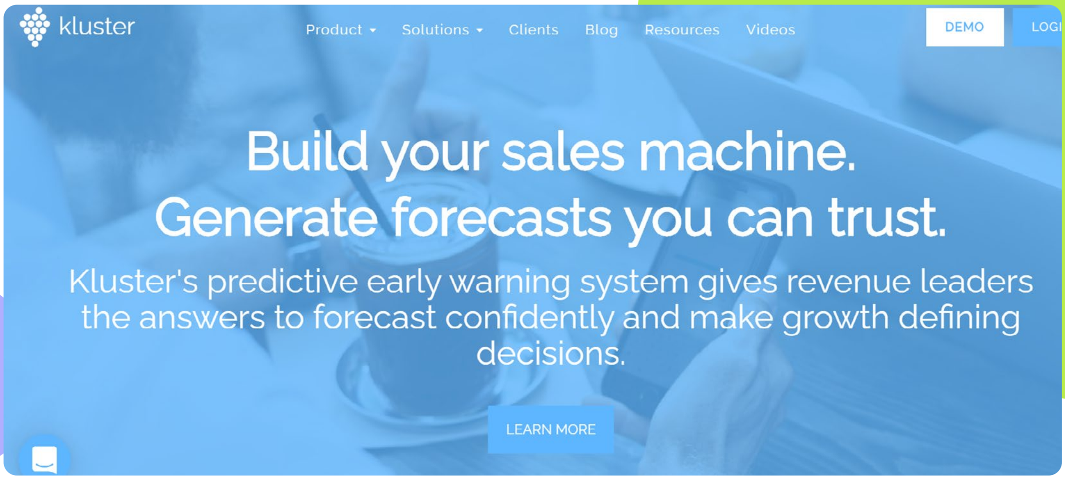
GetAccept is an all-in-one sales enablement platform for B2B sales teams. Speed up your sales strategy by deploying personalised videos, live chat and e-signature features. GetAccept's sales tools have been shown to increase closed-won rates by up to 42%.

Nancy had this tip to share:

"With GetAccept's deal tracking, your AEs receive real-time notifications whenever a prospect views, downloads, prints, forwards, or signs your sales assets. This helps them follow up at the most optimal times."

cognism

8 - Kluster



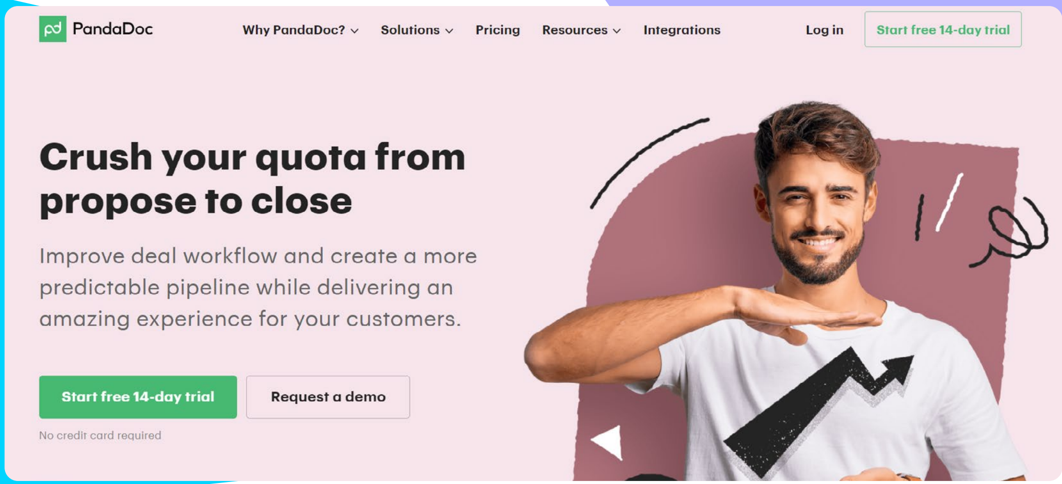
Kluster is the smart sales forecasting and pipeline management system. It interprets CRM data, producing insights that streamline your sales operation and make it more predictable. Kluster is available on web or mobile, or as a seamless integration with your CRM.

Jonathon had some thoughts on Kluster:

"Kluster is very useful for identifying which teams are struggling vs their forecast. Once you've identified the struggling areas of your business, you can take steps to help them, such as upskilling or providing more training."

cognism

9 - PandaDoc



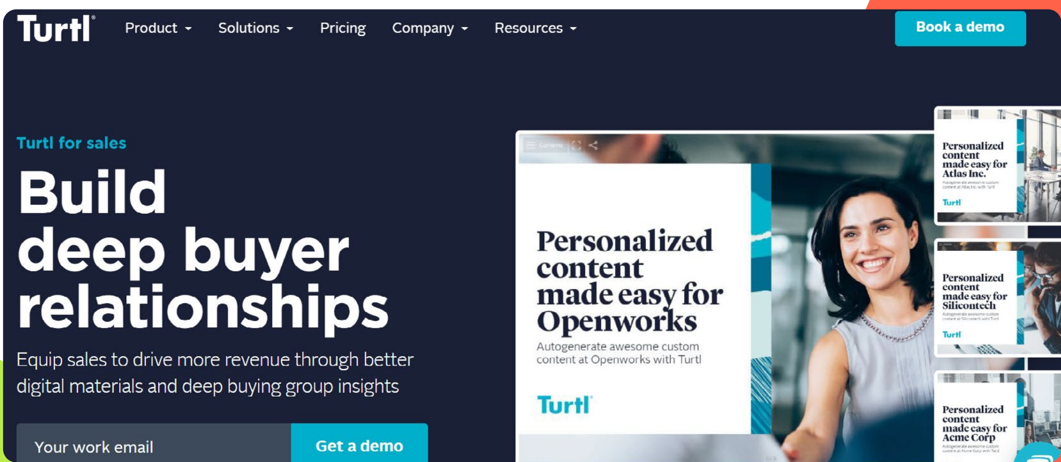
The B2B SaaS industry's number one proposal, contract and document solution. PandaDoc simplifies the contract creation and signing workflow, making it predictable, repeatable and scalable.

Nancy sent us this about using PandaDoc:

"Use PandaDoc's content library to store pieces of information that your team will be using over and over again, like Testimonials or Ts and Cs. This is a great way to ensure consistency across your paperwork."

cognism

10 - Turtl



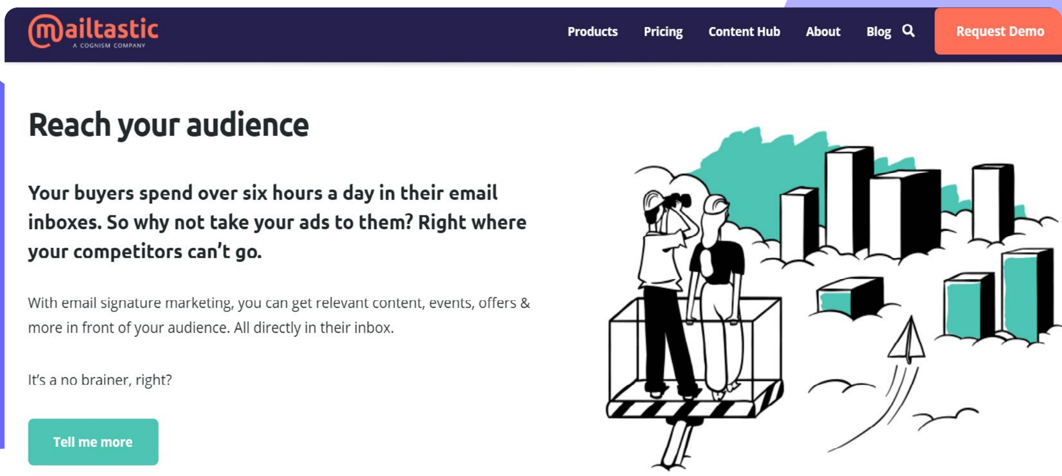
Turtl is an innovative, intuitive content creation and management software. B2B sales teams can use it to design trackable proposals and other collateral, improving insights into stakeholder priorities and strengthening conversations.

Jonathon is a keen advocate of Turtl:

"We use it at Cognism to create sales decks, presentations and slides. The best thing is that it provides analytics on what sections of our collateral are being looked at and for how long, meaning that we can improve them going forward."

cognism

11 - Mailtastic

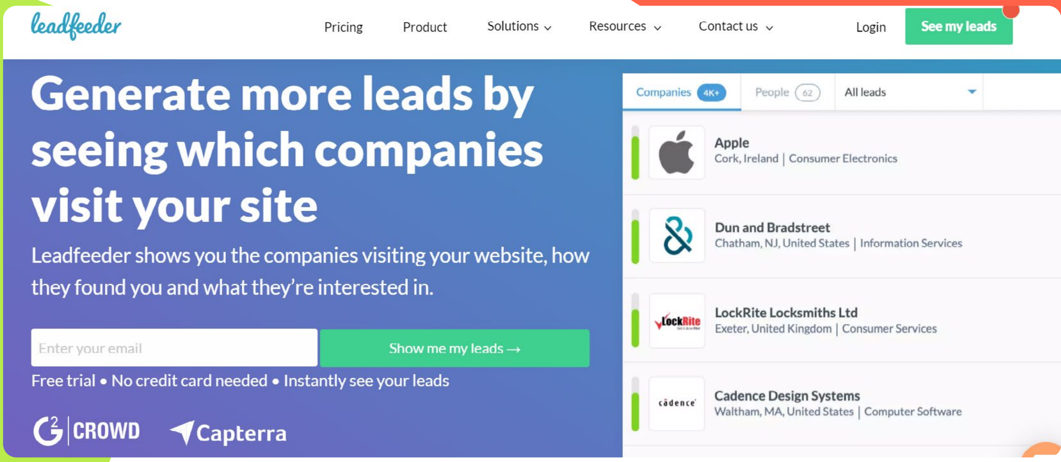


Mailtastic is the world's leading email signature marketing platform. Its solutions are also useful for sales leaders. With Mailtastic, you can centrally manage your employee email signatures, transforming them into a powerful B2B lead generation channel in their own right.

"Think about the number of emails your SDRs are sending every day. It's probably in the thousands or tens of thousands! Now think about all the things that you can promote using those emails - everything from webinars, whitepapers, events and more. That's what Mailtastic offers!"

cognism

12 – Leadfeeder



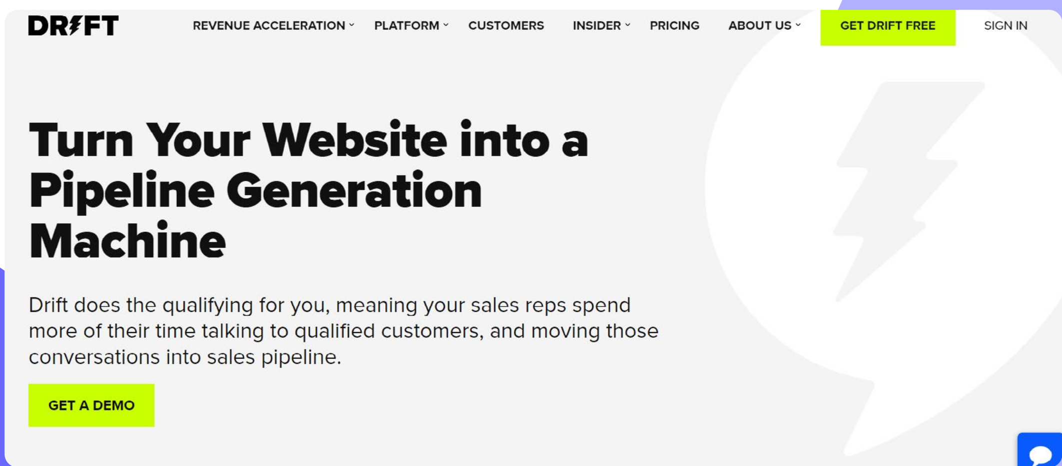
Leadfeeder is designed for tracking visitors to your website. It tells you the companies that click onto your site, how they found you in the first place and what areas they're interested in. All useful intel for the modern B2B sales pro!

Jonathon had some best practice advice to share about using Leadfeeder:

"One great feature is the ability to follow specific companies. When you follow a company in Leadfeeder, the platform automatically sends you email notifications whenever the company revisits your site."

cognism

13 – Drift



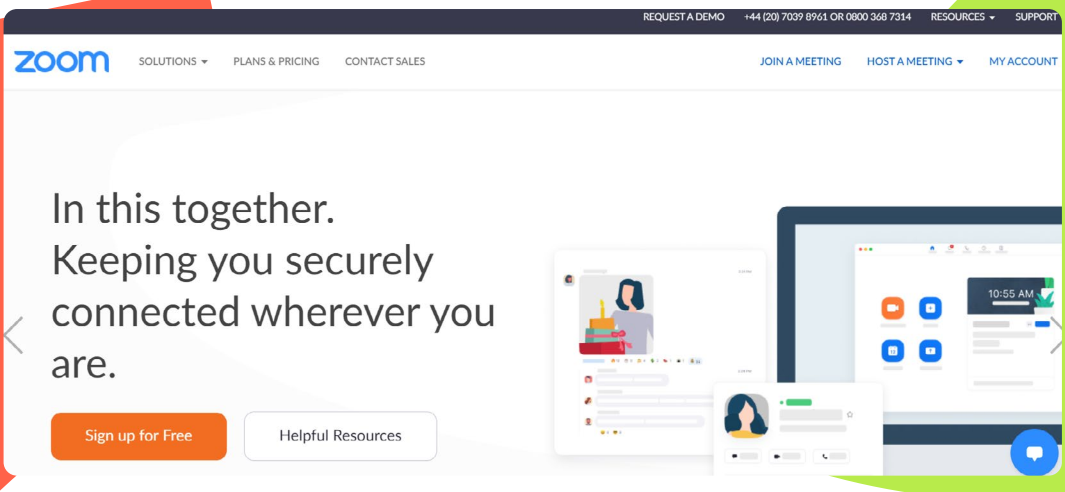
Drift has developed a suite of conversational sales tools, designed to make prospecting easier and quicker. It provides website visitor analytics, AI chatbots, personalised content and real-time notifications.

Jonathon had this to say about Drift's chatbot feature:

"Chances are, if you're a scaling company, you won't have the manpower to oversee the live chat on your site. Drift automates this function, replicating the behaviour of your top SDRs. The chatbot is always there, handling the workflow and driving conversions."

cognism

14 - Zoom



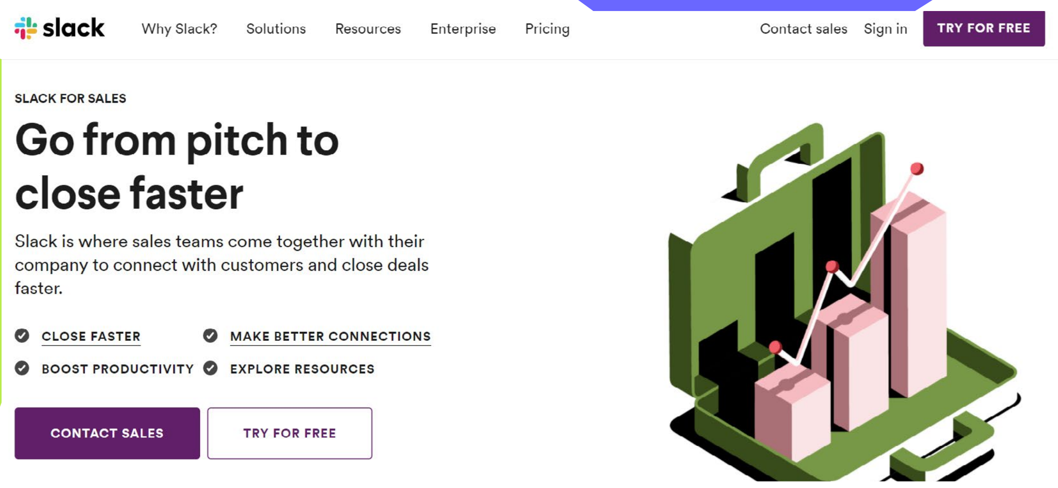
Perhaps the most indispensable tool on this list right now! When the coronavirus pandemic struck, Zoom became an overnight must-have for companies all around the world. Cognism's sales team uses it daily to set up video meetings with prospects and colleagues.

David is Cognism's Zoom super-user and he had this to say about the platform:

"From 121s with your line reports to those Monday morning team meetings and company-wide townhalls, is there anything Zoom can't do? Now that we're all working remotely, it's absolutely essential for maintaining company culture and communications. There is a range of pricing plans, including a free option."

cognism

15 - Slack



Slack is the ultimate company communication and collaboration tool. But it isn't just for sending memes and cat videos! It can also be used to connect with prospects and customers and grow those all-important business relationships.

Slack is also useful for SDR training, as David explains:

"We've created Slack channels for best - and worst! - sales calls. These are updated daily and we use them to coach our new starters in the art of cold calling. I don't think our sales team would be as good as it is without that ability to easily share knowledge and best practice between us."

cognism

Conclusion

We hope you enjoyed, and got value from, our sales guide. We'd like to thank all our contributors for sharing their knowledge.

Our final B2B sales tip is:

Always test and optimise!

Track everything you do, study the results, and make adjustments as you go. Let data be your guiding light across the whole of your sales strategy.

Good luck – and keep selling!

Send us your feedback

Do you have any comments/feedback about our guide? Connect with us on our social media – we'd love to hear from you!

LinkedIn Twitter Facebook Instagram

Contact Cognism today

Cognism is the world's best all-in-one prospecting solution.
Our accurate, compliant and intelligent B2B data can help you to:

- Identify more of your ideal customers.
- Engage with them when they're most likely to buy.
- Build a pipeline at lightning speed.
- Improve your outreach and drive better results.

Here's what some of our sales clients say about us:

PassFort **"Cognism helped us to accelerate our pipeline and reach out to key decision-makers in our target accounts much faster." - PassFort**

MindBridge **"We booked meetings with 5 Fortune 500 customers with the help of Cognism. It's an awesome sales and business development tool." - MindBridge**

Find out how Cognism can change the way you do email marketing.