



CAP DIGISOFT
ISO 27001 Certified

The
**OUTBOUND
PROSPECTING
PLAYBOOK**

www.capdigisoft.com

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Introduction:

What is outbound prospecting?

The goal of outbound prospecting is to generate interest from prospects who are unfamiliar with your company. This is carried out by sales reps (or SDRs), on a one-to-one basis.

The different B2B prospecting methods that a sales rep utilizes include cold calling, outbound emailing, and LinkedIn direct messaging. Outbound prospecting is more of a short-term approach. It is a quick and effective way to identify and qualify new clients, then move them through the sales funnel.

What are the benefits of outbound prospecting?

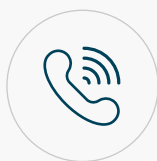
For small businesses and startups revenue goals can be aggressive, competition is fierce, and there's constant pressure to close deals and grow the customer base. As a result, outbound prospecting is extremely beneficial for B2B/SaaS startups.

If your company is a startup and the sales pipeline is looking empty, outbound prospecting can help you quickly refill it with prospects. With prospecting, you can efficiently book appointments with qualified leads.

However, you will need to be comfortable with frequent rejection and be ready to adapt to each dynamic prospect. If your salespeople are well trained and have the right skills, you can achieve and maintain amazing results.

What are the main outbound prospecting activities?

There are three main outbound prospecting methods:



COLD CALLING

Contacting prospects via the phone, qualifying them and then arranging a meeting.



OUTBOUND EMAIL

Contacting prospects via email, containing compelling and personalized content.



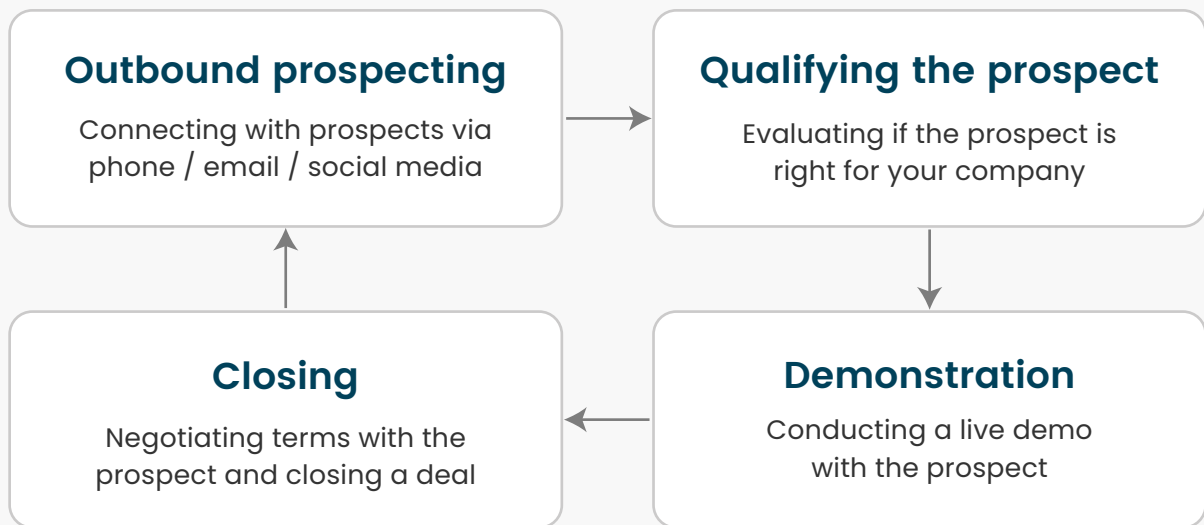
SOCIAL SELLING

Interacting with prospects on social networks - in B2B, the main social network is LinkedIn.

The combination of all these methods is known as a **“sales cadence”**.

The goal of these outbound methods is to persuade the prospect to view a live demonstration of a product or service. This is called a “sales demo” and the demo is conducted by a Business Development Manager (BDM) or Account Executive (AE).

If the sales demo is a success, then the BDM will negotiate and close a deal with the prospect. Here is a visual representation of the outbound prospecting process:



Outbound prospecting explained

Throughout this playbook, we'll be showing you all the techniques that will make you an expert at outbound prospecting. Here's what you'll learn:

- ✓ How to locate your ideal customer and how to calculate the total addressable market for your product or service.
- ✓ How to successfully cold call and schedule meetings with prospects - With CAP Digisoft's cold calling script for software sales.
- ✓ How to compose emails for outbound prospecting and ensure they always arrive in your prospects' inboxes.
- ✓ How to become an expert at social selling on LinkedIn.
- ✓ How to put all these techniques together in a sales cadence - With the ultimate B2B prospecting cadence utilized by CAP Digisoft's SDRs.
- ✓ How to conduct winning sales demos and close deals.

Welcome to CAP Digisoft's Outbound Prospecting Playbook, the world's best all-in-one prospecting solution. **Let's get started!**

How to define your ideal customer

Before outbound prospecting can begin, you need to figure out what your target list is going to be. Here's CAP Digisoft's guide to developing the Ideal Customer Persona for your product.

Your Ideal Customer Persona, or ICP, is a complete description of what you would consider your perfect customer; the kind of customer that would find the most benefits from your product or service, while also being able to provide a commensurate profitable value to your business.

Why is an ICP important?

ICP includes several benefits for an outbound sales team:

- **Quality leads**

Having an ICP will help you generate higher quality leads that are, in turn, more likely to convert.

Whether you're doing lead gen on your own, or buying prospect data from a third company, your ICP should be your north star that ensures the people that you're targeting are the right ones for your business or product.

- **Better outbound**

By drilling down to the details with your ICP, delving deep into your prospect's pain points, hopes and fears, you are able to tailor your outbound content to be way more effective and engaging.

Whether it's cold call scripts, outbound email sequences, videos, or social media messaging, you can really focus on your customer's needs and position your product as the perfect solution.

- **Consistently beat targets**

You know better than anyone the benefits that your product can deliver for your ICP. This knowledge means you can go out and proactively sell them.

Whether your KPI includes targets such as the number of meetings, or hitting your revenue goals, knowing who you're selling to and what they're looking for is essential.

- **Save time and resources**

Time is valuable. Don't waste it trying to sell to a prospect that has no interest in your product - they're never going to buy.

Having an ICP allows your team to generate leads from businesses who are in genuine need of what you provide, and better yet, can pay for it - meaning you can make sales more effectively.

• More revenue!

When all the puzzle pieces come together it should be obvious how much an ICP helps your sales team sell more effectively and efficiently, and B2B organisations that aren't taking advantage of an ICP are leaving money on the table.

Creating your ICP in 5 easy steps

Now that you're aware of the benefits that an ICP can bring to your organisation, here are five steps to creating an ICP that works for you.

01 Identify your super-users

It's more than likely that your ICP is a customer of yours already. The challenge is to find out who it is. Here are some tips to get you started:

- Analyse the data - which of your current customers are getting the most value of your product?
- Which of your customers don't just use your product, but love it and get more value out of it than the average user. Are any of your customers also advocates for your product?
- Narrow your customers down to around ten super-users for the purposes of creating your ICP.

02 Interview your super-users

If you find out what your best customers love about you and your product, the easiest way is to ask! Set up phone calls or Zoom meetings with your ten super-users and ask about their experiences with your product. The goal is to learn about:

- Their buying processes.
- How they found you.
- Why they purchased.
- How they're benefitting from your product.

03 Analyse the data

Once you've conducted your interviews and gathered all the data you've acquired, it's time to discover what it all means.

- Study the profiles of your super-users.
- Look for attributes they have in common. Are there any identifiable patterns or characteristics they all share? What connects them?
- Identify any correlations keep in mind any insights you've gleaned as you move on to the next stage.

04 Create your ICP template

Now it's time to put it all together.

At CAP Digisoft, we use a template to build up a detailed picture of our ICP. Here's an example which you can adapt and start using straight away!

CAP Digisoft Ideal Customer Persona



Industry

B2B Sales, SaaS



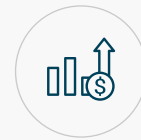
Geography

USA



Company Size

50 employees



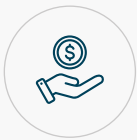
Budget

\$10,000/month



Buying Process

Reliance on referrals for buying decisions



Decision Makers

CEO, CRO



Technologies

Salesforce CRM
SalesLoft
Chili Piper



Pain Points

- Generating high-quality C-suite leads
- Automating outbound email campaigns
- Increasing sales team productivity



Business Goals

Short term: grow their client base by 20% over the next 3 months
Long term: raise their next funding round and expand their sales team



Attributes

Primary social media channel = LinkedIn
Gaining a reputation as SaaS industry thought leaders
Uses ABM strategies

05 Refine your ICP

The ICP process is a continuous one that need to keep being refined and Improved. Your ICP must adapt to changes in your audience and your industry over time.

● Embrace customer feedback:

Keep a finger on the pulse of what your customers are saying.

● Analyse your website traffic:

Which pages on your site are getting the most visitors? Find out what your ideal customers are currently interested in. Look into where your visitors are coming from.

This kind of information will help you refine your marketing message and the channels you use.

- **Look at your customer data:**

Which customers have the largest lifetime value? Which customers bring in the biggest profits? Look for data in your figures that can help you improve your ICP.

- **Look for patterns in closed-won deals:**

Are there patterns in your recent successful deals? Are they coming from one particular channel? Are you doing anything specific during the sales process which is boosting your chances of success?

Your ICP defined

Follow the steps outlined above to discover your ICP. Use it as a springboard for outbound prospecting success!

What is TAM and how to calculate it

The next step in outbound prospecting is to calculate the total amount of ideal customers available to you. Your TAM or Total Addressable Market is the total number of people in your target market.

This figure doesn't take into account the probability of them buying your product, and it doesn't consider their availability. As a result, TAM is a measurement of potential.

Calculating your TAM is the crucial first step to creating an outbound sales plan. It's the foundation of strategic planning and it simplifies every following process:

- ✓ Identifying new revenue opportunities.
- ✓ Calculating your total potential revenue.
- ✓ Finding investors.
- ✓ Planning your outreach.
- ✓ B2B lead generation.

How to calculate your TAM

There are two basic ways to measure TAM.

1. Top-down TAM analysis

This method of TAM identification is fast and can be calculated with minimum knowledge on the market you are targeting. To calculate your TAM using this method, you should first consider the total number of people in your target area, then, you will add additional information to refine the results.

Let's look at an example from HubSpot based on selling wine in the New England area:



You can add more information to refine this result further, but the top-down TAM analysis still mostly involves guesswork. Because of this, you should identify an upper and lower bound, and make an estimation somewhere in the middle. It's a good idea to be prudent with this estimation so you can avoid falling short of your targets.

If you're looking for a higher level of accuracy, consider this next method.

2. CAP Digisoft's TAM analysis

With CAP Digisoft's B2B prospecting tool, you get a more precise and accurate calculation of your TAM. By analyzing your current client base and using it to search for similar people, you will discover great opportunities for expanding your market. Here's how it works:

01 Customer analysis

CAP Digisoft's Customer Success team will help you analyze your existing client base and discover trends. These trends could be industries, job titles, company sizes, and locations you have had notable success with.

02 Expanding your market

Based on the trends we find, we will consider other areas you do not have much experience with and discover potential buyers who are worth contacting. You'll also want to understand why your current customers use your product or service. This is because understanding why your product resonates with your users can help you to scale up your business.

03 Search for your ideal buyers

You'll now use the information you've found to run a search in CAP Digisoft's prospector tool and find new potential buyers. The result will be the number of people who fit your description of an ideal buyer and this number is your TAM.

The benefits of the CAP Digisoft method

One of the benefits of using CAP Digisoft to identify your TAM is that you can accurately identify your total market size. With an accurate calculation of your total market size, you can organize it to find the number of potential buyers in each area. This is extremely helpful for strategic sales and marketing planning.

The bottom-up method

The bottom-up method is often used to make an estimation of your total potential revenue.

To find this estimation simply multiply your TAM with your pricing.

Let's consider the example from HubSpot again:

We established their TAM was 400 people. Let's say each liquor store will result in \$20,000. By multiplying \$20,000 and 400 together, we find that they have a total potential revenue of \$8 million.

It should be mentioned again that the more accurate your TAM calculation is, the more accurate your potential revenue figure will be.

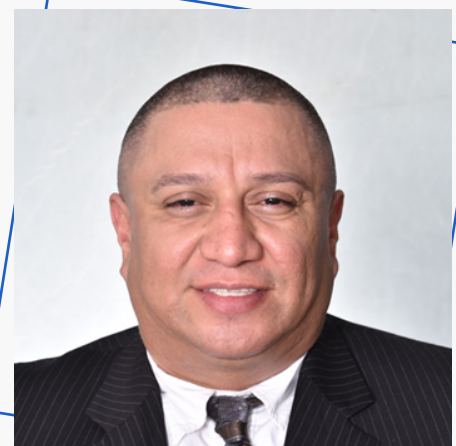
Which TAM analysis method is right for you?

If you're still doing a lot of research in your entrepreneurial journey, the top-down method of TAM analysis is a useful tool. You should use it to gain an insight into potential markets and estimate the value of your offering.

Top-down is also valuable if you're redesigning your offering, since this doesn't require absolute precision, just an idea of which way you should go. If you wish to go into more depth and truly understand your target market, it is worth your time to look into CAP Digisoft's prospector tool.

Cold calling

For most SDRs, the primary method of outbound prospecting is cold calling. It's also one of the most difficult to master. **Walter Lopez**, CAP Digisoft's Business Enablement Specialist, explains that many salespeople are nervous about picking up the phone and pitching to complete strangers, but when cold calls are done right it can be one of the most powerful outbound prospecting tools in your repertoire.



Here are Walter's top-five cold calling tips.

1. Research your prospects

Before picking up the phone, it's important to know who you're calling. Because of the work you've already put into your ICP and TAM analysis you'll already have a good picture of your ideal customer, but there are a few other things that can help you on your way to making successful cold calls.

Research the prospect and their company thoroughly using LinkedIn. Gather as much information about them as you can. Keep an eye open for any potential connections or angles you can use in your pitch.

After that, it's time to start dialing. One of the most important things to do when you first make contact with the prospect is to ask for permission to continue. It demonstrates that you're empathetic and respectful of their time. This is especially important during times of the year when businesses are most busy, such as the end of quarters when businesses are burning the candle on both ends trying to meet goals.

Once you've got permission (don't worry, people rarely want to say "no"), it's time to start your pitch, which should be no more than 30 seconds long.

2. Ask questions

An effective approach is to discuss the prospect's pain points as you see them. Ask the prospect if they agree with your assessment. If they're receptive, ask for more information. The more info you're able to get, the more successful you'll be with your cold calls.

Asking questions and following up creates a back-and-forth dialogue that helps you build rapport. However, you need to make sure your conversation gets to the heart of the matter. Every question you ask must identify a pain point - for example, "How much time do you spend finding new prospects?"

Open-ended questions (i.e.: questions that don't require a "yes" or "no" answer) can be very effective in this kind of conversation. They encourage the prospect to open up and share more information with you.

3. Offer solutions

Once you've identified and come to some agreement on the pain points, you can begin to position your product as the solution that they need.

Here's an example - if the prospect mentions that they use Salesforce, you can say "We integrate with Salesforce." Show them the impact your solution can have on their existing process and have some numbers and stats on hand to back up your claims.

4. Confidently go for the close

After you've planted some seeds in your prospect's mind that your product can be the solution to their problems, it's time to take it up a notch. It's time to make an assumption close to your call.

Let's say your goal is to get your prospect to book a time for a sales demo. Use this moment to make it clear that they will see more value from seeing the product in action rather than trying to explain it over the phone. Don't be afraid to go for the close by asking them: "Do you have time to see it?"

5. Do your admin work

Now that you've booked your demo it's not time to sit on your laurels. Now it's time to do your admin work!

Make notes in your CRM while everything is still fresh. Make them as detailed as you can as every piece of information could be useful when trying to close the sale.

Make sure to also follow through on anything you've discussed with your prospect. If you agreed to send them an invite, for example, do it straight away as it shows the prospect that their business is important to you.

BONUS TIPS

Walter shared some extra tips with us to help you succeed at your cold calls:



Take handwritten notes during your call

It's ok to realize that you won't remember everything. Instead, rely on taking notes and you'll be sure that you have all the information you need for the rest of the sales process.



Record your cold calls and listen back to them

Easy to miss small details when you're in the middle of a conversation. Being able to listen back means you might discover a nugget of information you missed at the time. It can also help refine your technique. There's a reason sports teams watch recordings of their games.

The ultimate cold calling script for software sales

Presenting the cold calling script that CAP Digisoft Growth Specialist **Xiomara Guerra**, uses to prospect IT/software companies!

When cold calling her prospects, Xiomara uses a script that she's developed herself. This script is geared specifically towards an IT and tech audience and has helped her achieve some fantastic results.



Xiomara's software sales script is an example that you can use when thinking about how your SDRs should be talking about your product and company. The script aims to gauge prospect interest and qualify them at the same time. The call is broken up into seven sections that serve to give your cold calls a structure and consistent flow.

01 The intro

Your conversations should always start with a friendly, conversational tone. Introduce yourself by telling the prospect your name and the company you represent.

"Hey [name], Xiomara from CAP Digisoft here. How are you?"

If the prospect answers positively, you can respond with...

"Great! I know I'm calling you a bit out of the blue. Is now a bad time?"

The logic behind asking **"is now a bad time?"** is that people naturally want to say **"no"**. By asking the question in this way, we give them the opportunity to do so. Xiomara learned this particular trick from the book **Never Split the Difference**, by **Christopher Voss**.

02 The opening pitch

Xiomara designed her cold calling pitch in order to be able to give some information about what CAP Digisoft does, without talking about the key value proposition. The goal is to reveal little as you can at the beginning of the call. You want the prospect to follow up with some questions.

“Fantastic! So [name], I just wanted to give you a quick call as we’re currently doing lots of work with [tech/software company of a similar size], as well as a variety of other tech companies like you guys. We help our clients by giving them a tool which they can use in-house to generate direct contact information for key decision-makers within their target markets.”

It’s always a good idea to show the prospect that you’ve done your research into their business – you can do this, for example, by quoting the types of industries that they’re prospecting to.

“I can see that you target [industry/industries]. How are you finding leads from within that sector / those sectors?”

Xiomara ends her pitch by asking a simple, open-ended question. This kind of question provides plenty of opportunity for the prospect to give a lot of detail.

03 The discovery

There are a couple of reasons that the discovery aspect of a cold call is important:

- ✓ You can determine whether or not the prospect is a good fit, helping you to qualify the lead.
- ✓ You can better understand their current processes, so you can more effectively explain how your solution adds value.

Xiomara has several questions that she thinks are great ways to discover more about her prospects. Here are a couple of examples:

“How are you generating your leads?”

Some of the possible answers the prospect may have include LinkedIn, a B2B data competitor, networking, or they might not generate their own leads at all –perhaps they rely on referrals.

Whatever the answers are, this is a great opportunity to draw a direct comparison between their current process and how your solution can benefit them. Discuss ways your solution can solve a problem in their process or how it can make it more productive.

Try to be specific to the prospect and their industry. Your message must be directed at showing them the value you can bring to their company..

“Which channels do you use to reach out to your leads?”

Some of the answers the prospect may come back with include: phone, email, or LinkedIn. Use the details that they give you to direct the conversation forward. For example, if they express that they use email as their main outreach channel, then don't want to start talking about the accuracy of your phone data!

Obviously the discussion should be about the effectiveness of your product when it comes to email, for example how CAP Digisoft's validated email addresses have 97% deliverability, which results in a lower bounce rate.

Xiomara recommends that you always have relevant statistics and facts on hand during your cold call to validate your claims.

"What's your target market in terms of job title/location/company size?"

This is a great way to start getting specific in your conversation. Let's imagine that the prospect replies with: **"HR directors working in the US Southwest region."**

Instead of replying with:

"We have 400 million B2B profiles which you can segment down to find your target market..."

You can reply with:

"We have 400 million B2B profiles, which you can segment down to find an extensive list of HR directors working in the Southwest..."

The questions you ask should always lead to furthering the conversation, drilling down details, connecting with the prospect and bringing them back to how valuable your product can be to them.

04 The second pitch

Now that you've gleaned all this information from your prospect, you should have a much better idea about who they are and what their needs are. This is the stage in your cold call where you can make a second pitch, this time with more detail. Armed with more info, you can better explain how your solution is a better value for the prospect.

The more relevant to the prospect you make your solution, the more engaged they'll be!

Xiomara's second pitch looks like this:

"Fantastic! So, [name], to give you a little more context, CAP Digisoft is the world's largest database consisting of over 400 million B2B profiles. How it works, is you would run highly-targeted searches for [target market: e.g. HR Directors in US tech]."

"This would generate a list of contacts, and for each individual, we would provide you with [data points relevant to them based on the channels they use: e.g. if they only use emails because their outbound consists of email marketing campaigns] "...email addresses with 97% deliverability."

05 The value proposition

This step is all about validation. Explain why other clients have switched to using your product over their old processes. Show the value that those clients have gained by doing this.

Here's how Xiomara does it:

"The main reason why our clients have typically moved from [current process: e.g. LinkedIn] is because [explain how our solution can add value]."

06 The case study

A great way to validate your product with your prospect is with a relevant case study. Talk about the results previous clients achieved using your solution.

Xiomara sets it out like this:

"We're actually working with [similar client] right now. They managed to achieve [result] in [time frame]."

07 The close

Although many would say that this is the hardest part of a cold call, really, there's not much to it! Try your best to be assertive and clear and schedule a time to do a demo. A great way to do this is to suggest that your cold call might be a waste of the prospect's time - wouldn't they rather see a sales demo?

“Look, [name], rather than me spending more time rambling about the product, would you be totally against seeing the platform over a 15-minute call? I could run some personalised searches for you based on your target market and show you the quality and quantity of data that we have.”

As Xiomara mentioned before, It’s totally natural for your prospects to want to say “no”. By asking “would you be totally against seeing the platform?”, you’re giving the prospect the opportunity to answer from a position of authority.

BONUS TIPS

Xiomara gave us some other, more general tips to help you with your software sales cold calls.



Repeat the prospect’s name during your conversation to build rapport (as recommended in *How to Win Friends and Influence People* by Dale Carnegie).



Be an active listener - when you repeat what the prospect says back to them it shows you’re listening and engaged. For instance: “Okay, so your sales team are finding their leads through LinkedIn and reaching out via cold calling and email. Fantastic, so...[next questions/follow up with how you can add value.]



Tonality - always be aware of how you’re speaking. Don’t be robotic! Develop a natural tone to your conversation that is warm, personable, and comfortable.



Refer to any current customers of yours that are similar to the prospect’s business - this can be based on company size, industry, location, etc.



Try to back up your cold call with case studies if possible. Create a “Jones effect” around your product - if the prospect’s peers are using it, then they’ll want to check it out too!

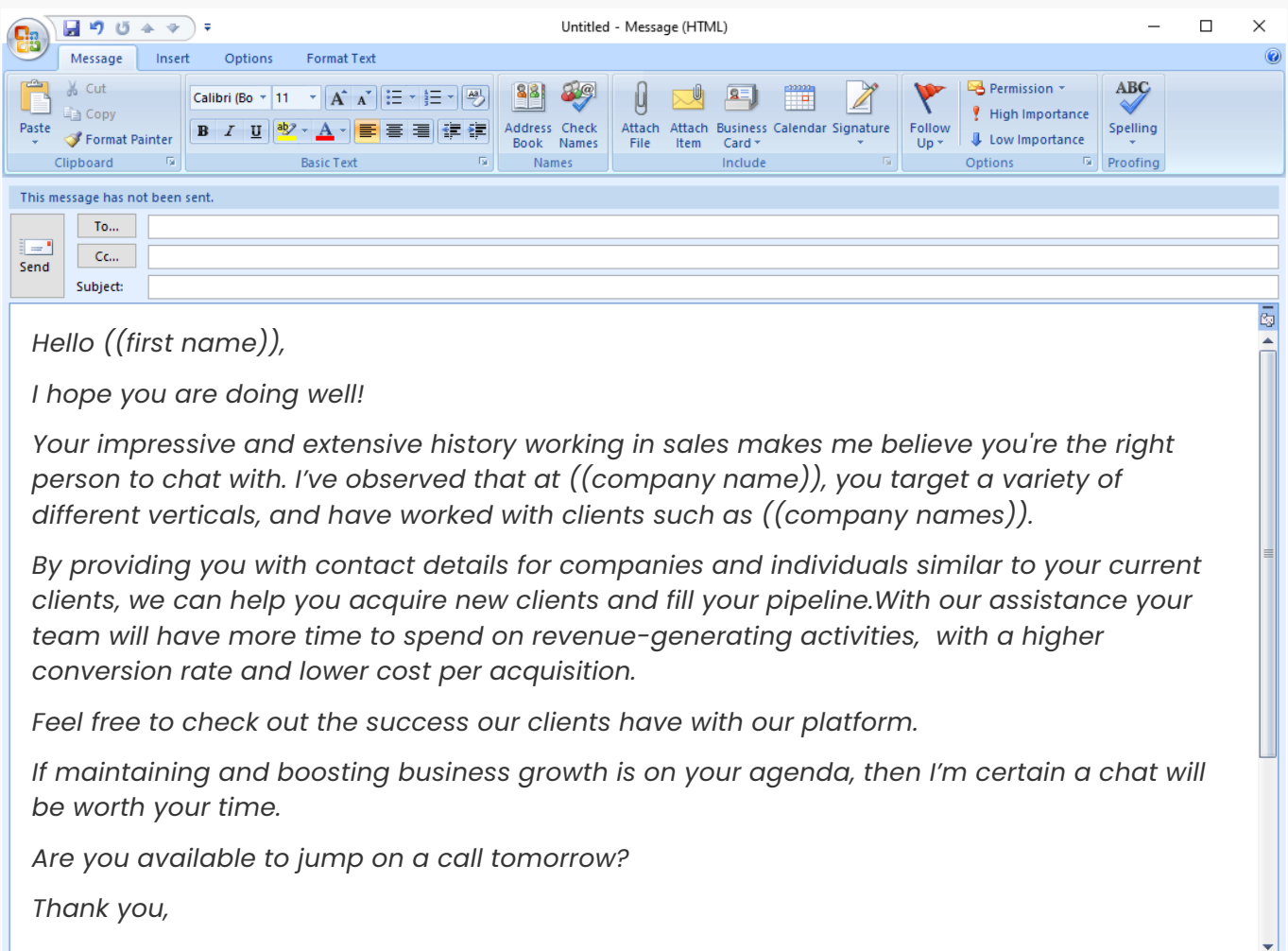
Outbound email

In this chapter we spoke with the three top performing SDRs from CAP Digisoft's outbound prospecting team and asked them to share some advice on crafting outbound emails. They also looked into their inbox analytics and showed us their most successful emails.

A study by Campaign Monitor shows that roughly 129 billion business emails were sent and received every day in 2019. Because so many businesses went remote and stayed partially remote due to the covid-19 pandemic, that number has certainly increased. This proposes a huge challenge for SDRs. What can you do to make your prospect notice your sales emails within the billions of emails being sent out by competition? Luckily, CAP Digisoft's SDR team is here to help! Read on for their outbound email guide.

The first email in a cadence

We asked **Yasmin** to share her knowledge on the process of sending the first email in a prospecting cadence. Here's the template that she refers to when creating the first email:



The screenshot shows an email client window titled "Untitled - Message (HTML)". The interface includes a menu bar (Message, Insert, Options, Format Text), a ribbon with various tools (Clipboard, Basic Text, Names, Include, Options, Proofing), and a message composition area. The message body contains the following text:

Hello ((first name)),

I hope you are doing well!

Your impressive and extensive history working in sales makes me believe you're the right person to chat with. I've observed that at ((company name)), you target a variety of different verticals, and have worked with clients such as ((company names)).

By providing you with contact details for companies and individuals similar to your current clients, we can help you acquire new clients and fill your pipeline. With our assistance your team will have more time to spend on revenue-generating activities, with a higher conversion rate and lower cost per acquisition.

Feel free to check out the success our clients have with our platform.

If maintaining and boosting business growth is on your agenda, then I'm certain a chat will be worth your time.

Are you available to jump on a call tomorrow?

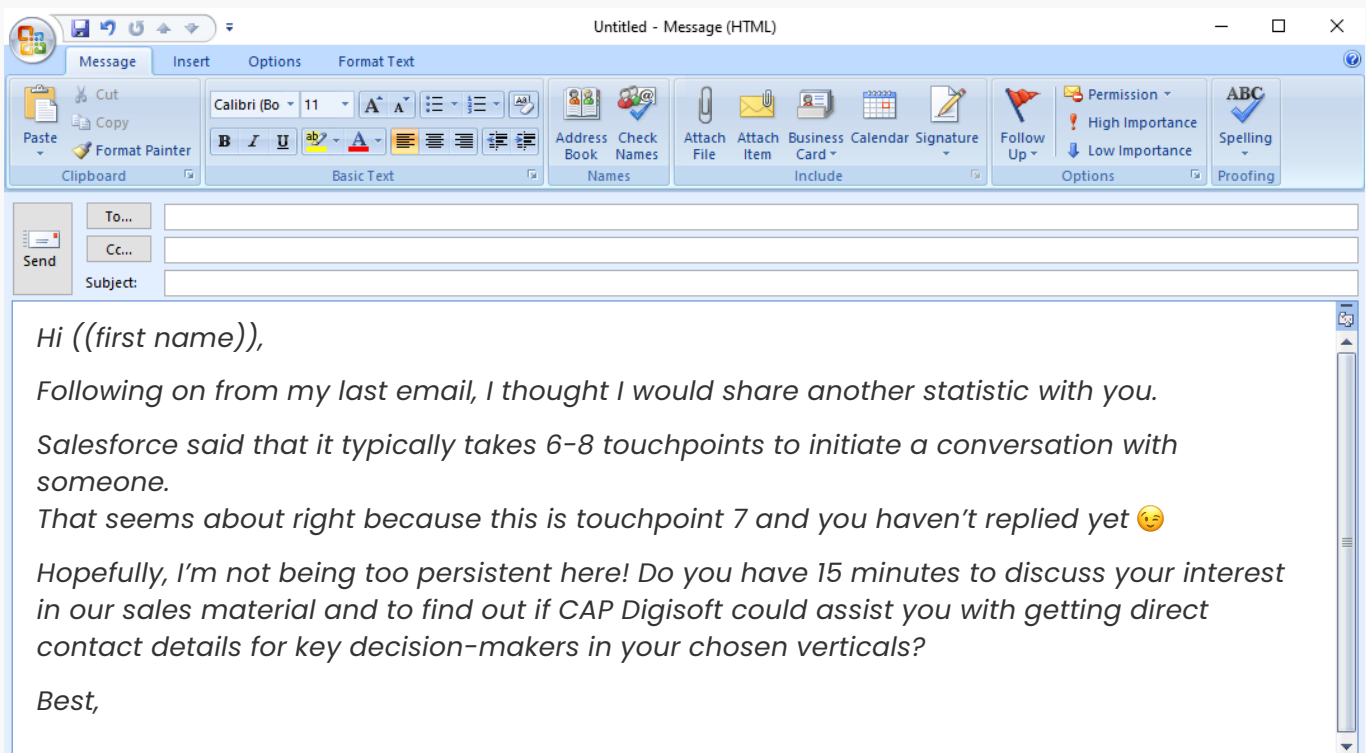
Thank you,

YASMIN'S EMAIL TIPS

- ✓ Always look into the prospect and their business before writing your email. Include as much research as possible in your email, this shows that you actually care because you took the small amount of time necessary to do a short Google search.
- ✓ Personalize your email. The first email in your cadence should be about 25% personalized, you want them to feel like they are talking to an actual person. Don't forget to always include the prospect's name and their company name.
- ✓ Don't put too much information into the first email, you will overwhelm them, and it's likely they won't take the time to read a very long email. Keep the email short, straight to the point, and keep an air of mystery.
- ✓ Include links to relevant content - in the example above, the email contains a link to CAP Digisoft's blogs, which the prospect can browse on their own time.
- ✓ Try out this as a subject line: "A question for you, ((first name))". This subject line often results in higher opening rates.

Email following a content download

Here's an email that Yasmin used for this purpose, which received reply rates of up to 20%:

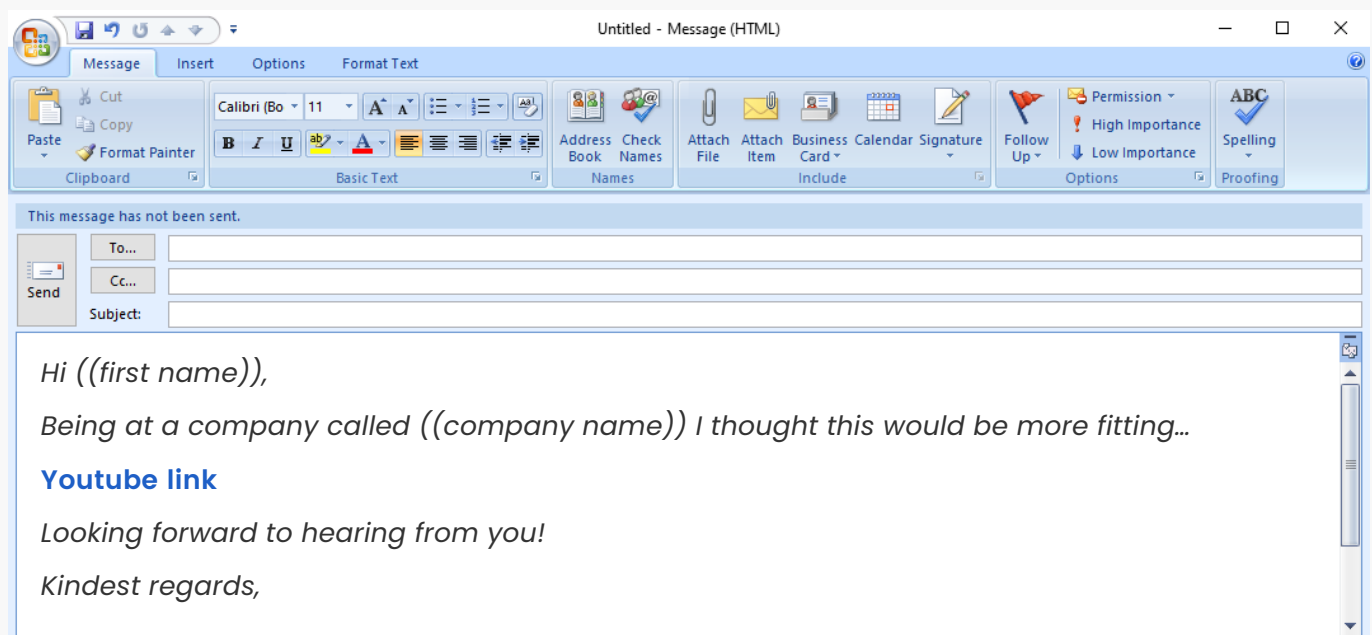


YASMIN'S EMAIL TIPS

- ✓ Keep your emails as short as possible, 100 words should be the cap.
- ✓ Try out this subject line: "CAP Digisoft referred by ((colleague name))". It can be very powerful to mention in your subject line that you've been referred by someone else in the prospect's company.
- ✓ Make sure to add in some humor, emails containing a bit of humor are usually more successful, often increasing reply rates by 28% and more. • A/B test your emails. Split your prospect list into 2 groups. Send one style of email to the first group, and another style of email to the second group. Whichever email performs better is the one you'll use going forward. Be guided by the B2B data in everything you do.
- ✓ Timing - You should time your emails to be sent early in the morning, around 6-7 a.m, so they're some of the first emails your prospect sees. However, if the prospect lives in a different country than you, you will want to make sure your emails get sent early in the morning for their time zone.

Email containing video

Here's an email that Yasmin sent to a prospect, with her video embedded:

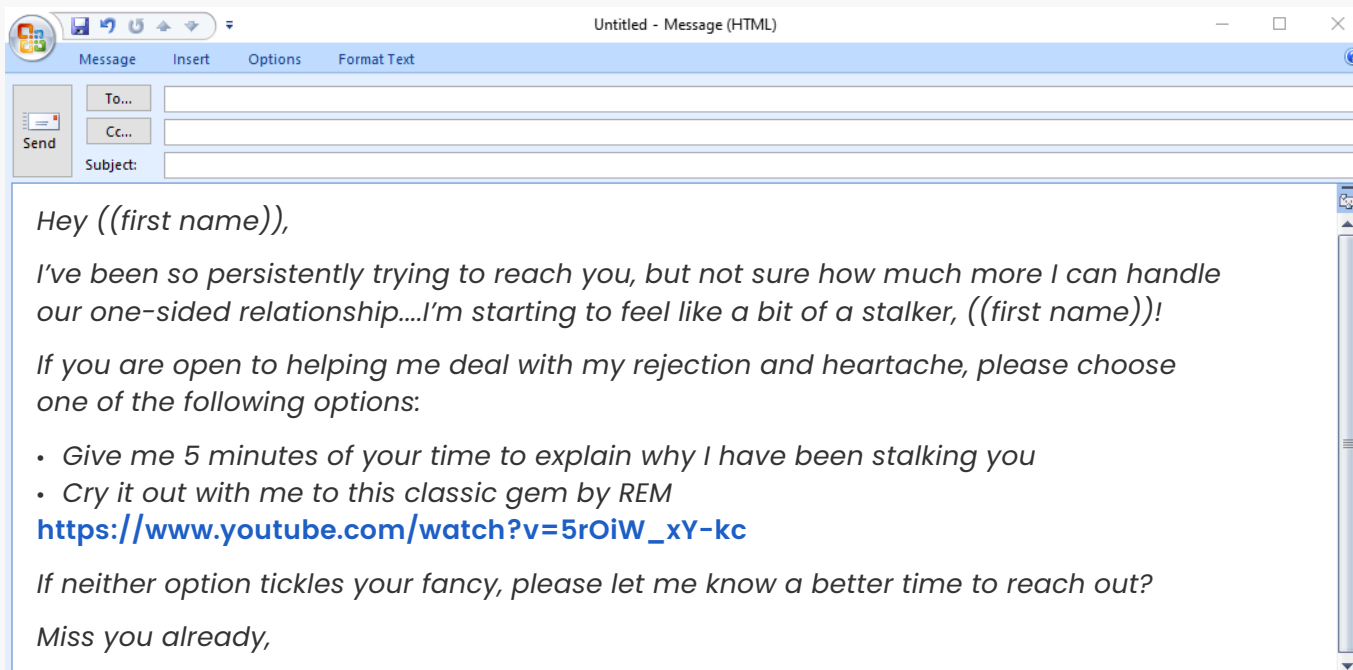


YASMIN'S VIDEO TIPS

- ✓ As this email contains a video message, you can afford to keep the email copy very short and snappy!
- ✓ Have the prospect's LinkedIn profile or company website open as you record your video. Scroll through the page and use the information you see in your video.
- ✓ Use the prospect's name a LOT. This is crucial for building rapport during your video.
- ✓ Never go over 90 seconds. The shorter your video, the more likely it is that the prospect will watch it!
- ✓ Ask for feedback at the end of your video. This is a good technique for starting a conversation with the prospect.
- ✓ Block out time in your calendar to record all your videos in one go. Say, an hour at lunchtime when you're not making cold calls.
- ✓ Whenever you connect with a prospect on LinkedIn, send them a video straight away. You'll see increased conversion rates with this approach!

The last email in a cadence

The last email in a cadence (also known as a "break-up email") can be the hardest one to write. You want to close things off, but also leave it open. Yasmin Gracias provided us with a break-up email that she uses in her cadence. Here it is.



The screenshot shows an email client window titled "Untitled - Message (HTML)". The window has a menu bar with "Message", "Insert", "Options", and "Format Text". Below the menu bar are fields for "To...", "Cc...", and "Subject:". A "Send" button is visible on the left. The main body of the email contains the following text:

Hey ((first name)),

I've been so persistently trying to reach you, but not sure how much more I can handle our one-sided relationship....I'm starting to feel like a bit of a stalker, ((first name))!

If you are open to helping me deal with my rejection and heartache, please choose one of the following options:

- *Give me 5 minutes of your time to explain why I have been stalking you*
- *Cry it out with me to this classic gem by REM*

https://www.youtube.com/watch?v=5rOiW_xY-kc

If neither option tickles your fancy, please let me know a better time to reach out?

Miss you already,

YASMIN'S EMAIL TIPS

- ✓ The final email is where you can really indulge in some humor. Get the prospect smiling when they read your email! You never know, it might just be the catalyst for them to hit "Reply"!
- ✓ The opening line is the most important line in an email. After the subject line, it's the thing most prospects look at before making a decision to read on. Take your time in crafting your opening line. Make it strong and compelling.
- ✓ Always include a final question or CTA at the end of the email. It's a possible end, not the definite end to this opportunity!
- ✓ The 3 top email metrics to track are: open rate, read rate and click-through rate. Study these 3 KPIs for every email you send.

Tips to avoid getting caught in SPAM filters

It is incredibly frustrating when you spend valuable time composing the perfect outbound prospecting email to send to your prospect, and when you send it nothing happens. Then, you eventually find out that your prospect never got to read your email because it went straight into their spam folder!

At CAP Digisoft, our experts who ensure our emails always get to their destination are [Yasmin Gracias](#) and [Walter Lopez](#). Yasmin is our Growth Team Manager and Walter is our Business Enablement Specialist. They've put together a guide to help SDRs avoid ending up in the spam box.

How do spam filters work?

Your outbound prospecting emails may be considered spam by your prospects email service, If this is the case they will most likely never see your email. Each mailbox provider has their own methods for detecting spam, which are constantly being updated to stay up to date with the evolving trends.

For example, Gmail's filters are highly-engagement and content-led. If Gmail detects that a majority of recipients are opening, reading, and forwarding your bulk emails, they have a higher likelihood to end up in the inbox.

How do I know if I'm in spam?

The most obvious sign that your emails are ending up in spam is if you're receiving less responses than normal. If you use an email marketing software, check the stats. The read rates will show as lower than usual if you're in the spam folder. Now, if you also receive a high volume of bounce receipts telling you that your emails are being forwarded to spam, that's definitive proof and it's time to act.

What should I do next?

If you suspect your emails are ending up in spam, you should send your emails to your colleagues as a test. Send them the same email you've been sending your prospects and see if it is forwarded to their spam folders. It would also be smart to ask your technical support team to run a deliverability test. You should always act immediately if you suspect your B2B sales emails are ending up in spam. SDRs can never be effective if their emails do not reach their targets.

Prevention is better than a cure

Let's talk about ways you can ensure your emails never end up in spam. The best method you can practice is to try and make your outbound email look like something you would send to a friend.

Avoid having an excess of links

Don't put too many links in your email. Spam filters do not like emails filled with links and will flag them. As a result watch out for:

- ✓ Links in your signature
- ✓ Links to calendars
- ✓ Links to reviews
- ✓ Links to videos
- ✓ Links to blogs
- ✓ LinkedIn links

We recommend that you have no more than four links in your email. If you can, try to cut that amount down too.

Be mindful of sending limits

You will want to make sure you send consistent amounts of emails each day. If you send inconsistent amounts each time (e.g.: 5 emails one day, 100 emails the next), the spam filters will notice this and mark you as spam as a result. You should make sure you send a steady flow of emails each day, if you struggle with this CAP Digisoft's prospecting tool has an email sending limit feature.

Personalization makes perfect

To give your emails that familiar feeling of a friend or acquaintance, you need to get as personal as you can while maintaining a professional feel. Use merge fields to get names in there and make sure everything you send is relevant to the recipient, CAP Digisoft's prospecting tool can aid with this. Avoid the use of buzzwords that are associated with spam. Such words like "free", even in the case of, "Are you free for a chat?" can lead your email to the spam folder. These kinds of words can be associated with scam emails, especially if used excessively. Instead, you should say, "Are you available for a chat?".

If you are finding your emails constantly ending up in your prospect's spam folder, you should consider going through the steps above and perhaps try out CAP Digisoft's marketing and consulting services. With our proven processes we will ensure your emails always reach your prospect's inbox.

Social selling: LinkedIn

Social media is one of the major outbound prospecting channels and with the advancing use of social media in the world, it is extremely important for companies to use these platforms. For B2B/SaaS, LinkedIn is the platform you will want to primarily focus on. Here our Growth Team Manager at CAP Digisoft, Yasmin Gracias, shares her guide to LinkedIn prospecting.

LinkedIn is currently the world's number one social network for business and this is stressed by a recent study on LinkedIn. This study shows that LinkedIn has 660 million users working at 30 million companies. **Out of the 660 million users, 90 million** are considered senior-level in their company, with a further 63 million identified as being decision-makers.

A recent calculation showed us that 80% of B2B leads come from LinkedIn which means that LinkedIn is a channel you should be taking advantage of as an outbound prospector. LinkedIn has a highly receptive audience of potential buyers looking to expand their professional networks. It would be a shame for any outbound prospector to ignore any opportune platform like LinkedIn.

You may have a few questions, such as: How can I use LinkedIn and maximize it to my advantage? What steps do I need to take to turn a social network into a selling network?

Yasmin Gracias, CAP Digisoft's Growth Team Manager, has advice for us.

She leads our outbound sales team to find and acquire prospects through all B2B channels, as a result she has an immense amount of experience prospecting on LinkedIn. Yasmin told us how she prospects effectively on LinkedIn in a few steps.

Following these steps can help you utilize LinkedIn to its greatest potential and turn it into a B2B lead generator.

01 Know your prospects

Yasmin's first step is to identify who your prospects are. This is imperative because if you don't know who to look for, you will waste precious time and energy. Start by consulting your Ideal Customer Profile (ICP). This will tell you...

- ✓ Who your preferred customers are.
- ✓ Where they work.
- ✓ Their job titles.
- ✓ The industries they work in.

Looking at your ICP will help immensely when it comes to outbound prospecting on LinkedIn.

02 Find your prospects

Once you have a solid ICP, you can start searching for people and companies on LinkedIn. LinkedIn gives you the option to search for People, Jobs, Content, Companies, Schools and Groups which helps you to customize and narrow down your searches.

After you do a bit of searching, perhaps you come across a company that fits your ICP. The first thing you should do is find the decision-makers in that company. To do this, you will want to click on "People" on the company page and scroll down. This will display a list of all the employees in that company.

Once you find a person who fits your criteria you can reach out and start a conversation on LinkedIn.

Another good tip that Yasmin suggests is to go to a company profile and click on "Similar pages" which will be to the right of the company's posts feed. This will give you a list of similar companies that you can prospect to. By repeating the steps described above for each similar company, you will find dozens of prospects in no time.

03 Message your prospects

Now that you have found your ideal prospects, you should start messaging them. Yasmin's advice is to organize this process. It is a good idea to block out time in your calendar so you can solely focus on sending messages on LinkedIn.

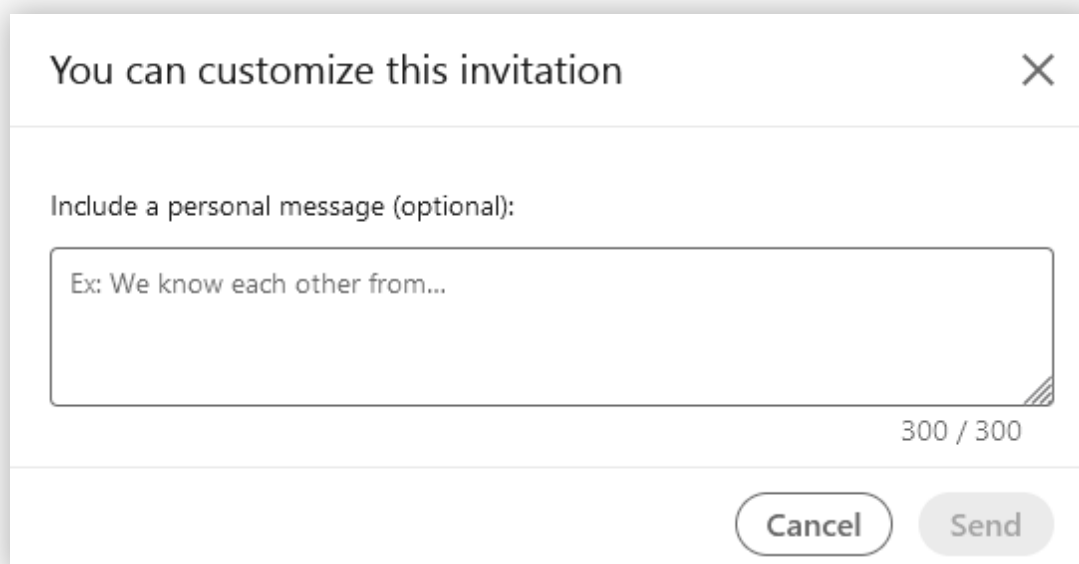
To organize this process, Yasmin suggests you take an hour in the morning to send connection notes and an hour in the evening to write follow-ups. To keep your LinkedIn prospecting even more organized you can create an Excel sheet or Google doc to track your LinkedIn messaging.

This document should include your prospects' names, the time that you sent your first message, what their response was and if it can be considered positive or negative, and the time that you sent your follow-ups. Building and organizing a process around your LinkedIn prospecting helps you remember who you have sent messages to and when you sent those messages.

If you use an outbound cadencing tool, you should add this LinkedIn process to your prospecting workflow. This will ensure that you are prospecting people over multiple channels. It also helps you keep track of your tasks and all your activity in one place.

The connection note

The first message you send to a prospect on LinkedIn is called the connection note. This is the box that opens up when you click the blue "Connect" button on a LinkedIn profile:

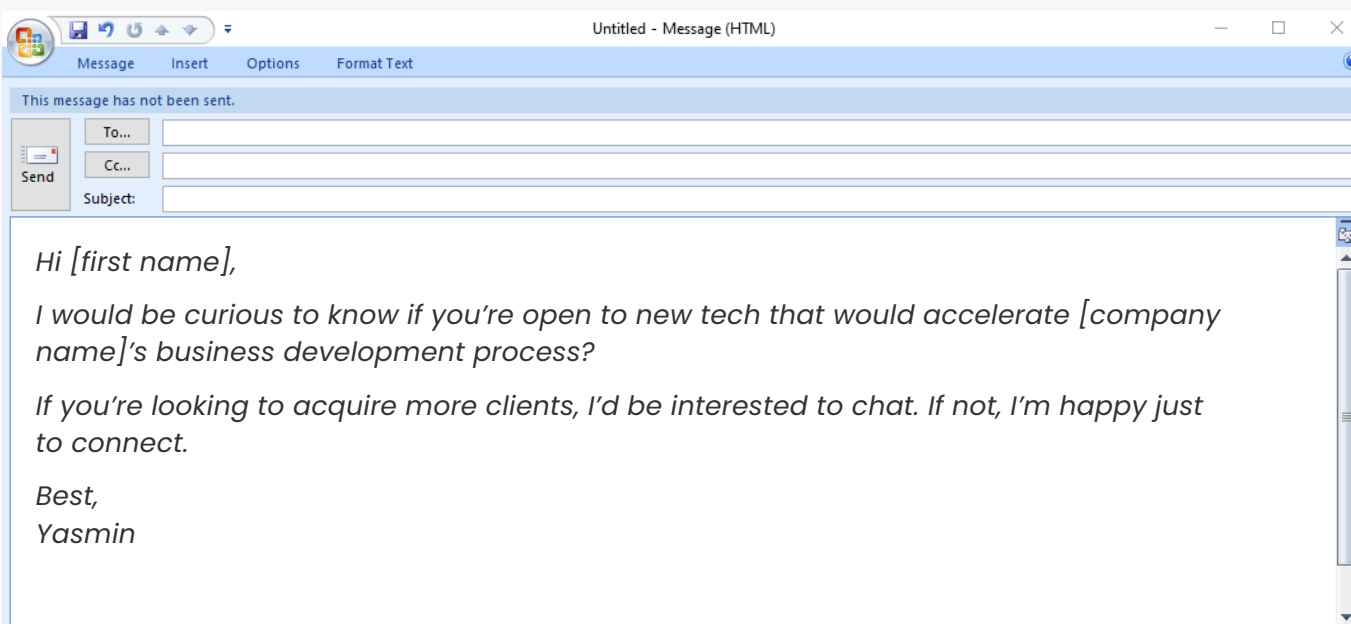


The screenshot shows a dialog box titled "You can customize this invitation" with a close button (X) in the top right corner. Below the title, it says "Include a personal message (optional):". There is a text input field with the placeholder text "Ex: We know each other from...". To the right of the input field, it shows "300 / 300". At the bottom right, there are two buttons: "Cancel" and "Send".

LinkedIn gives you 300 characters to write your connection note. This may seem like a small amount, but your intention here is not to pitch your product, it's to start the conversation and generate interest. Here are Yasmin's tips for writing a successful connection note:

- ✓ Personalize your message - it should not look like copy-and-paste or spam. It should make the prospect feel like they're talking to a real person who truly cares about their time and their business.
- ✓ Be concise - you only have 300 characters to work with, so make sure you use them wisely.
- ✓ Create a feeling of intrigue - don't reveal too much about your product or service, but reveal enough to make the prospect curious.

Here's an example connection note that Yasmin has sent to a prospect:

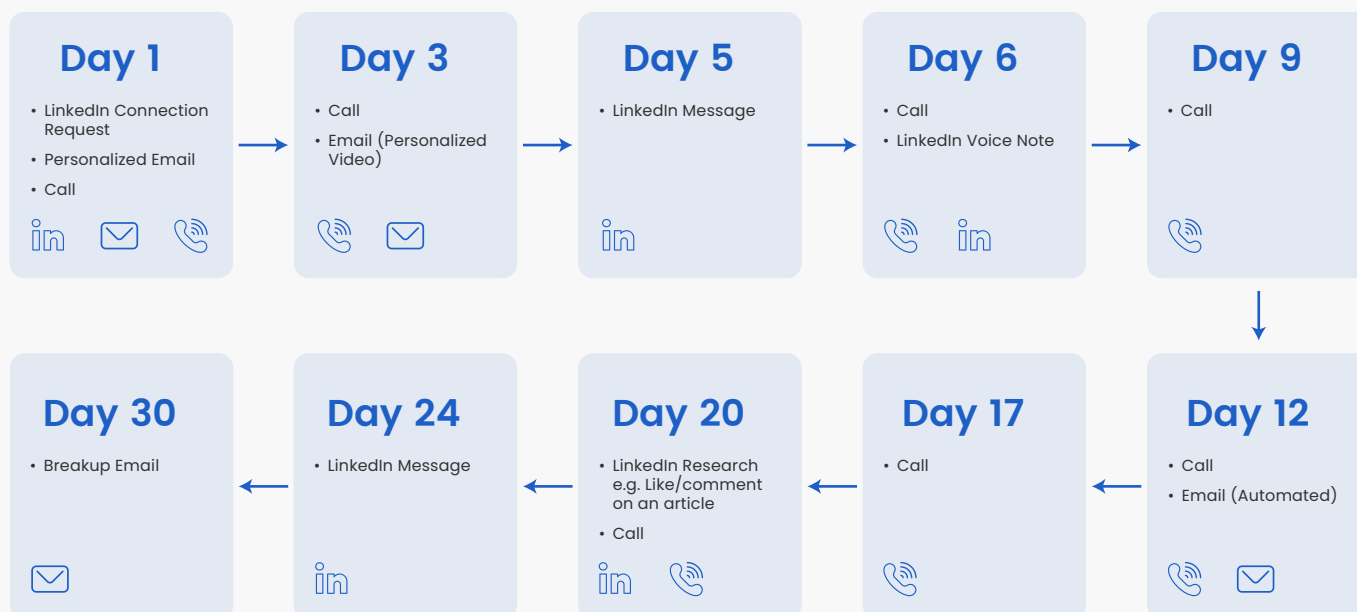


Sales cadence: the ultimate outbound prospecting cadence

At CAP Digisoft, we've always spoken about "the science of B2B sales". Through a rigorous, organized process you can achieve amazing results. When the pandemic struck causing the global economy to falter and many businesses to struggle with finding new customers, we reviewed all of our B2B prospecting processes. We asked ourselves some questions: What can we learn? How can we improve? What can we do differently?

One of the key aspects we examined was the cadence used by our sales team. In this new era for sales, it was clear a refresh was long overdue. Through a meticulous process of A/B testing, we finally developed a cadence that perfectly maximizes engagement and delivers results.

Here is an overview of our cadence:



The ultimate outbound prospecting cadence explained

We chatted with Walter Lopez, our Business Enablement Specialist, and asked him for his comments on the cadence. He walked us through every step of the cadence and explained why it's been so successful for our SDRs.

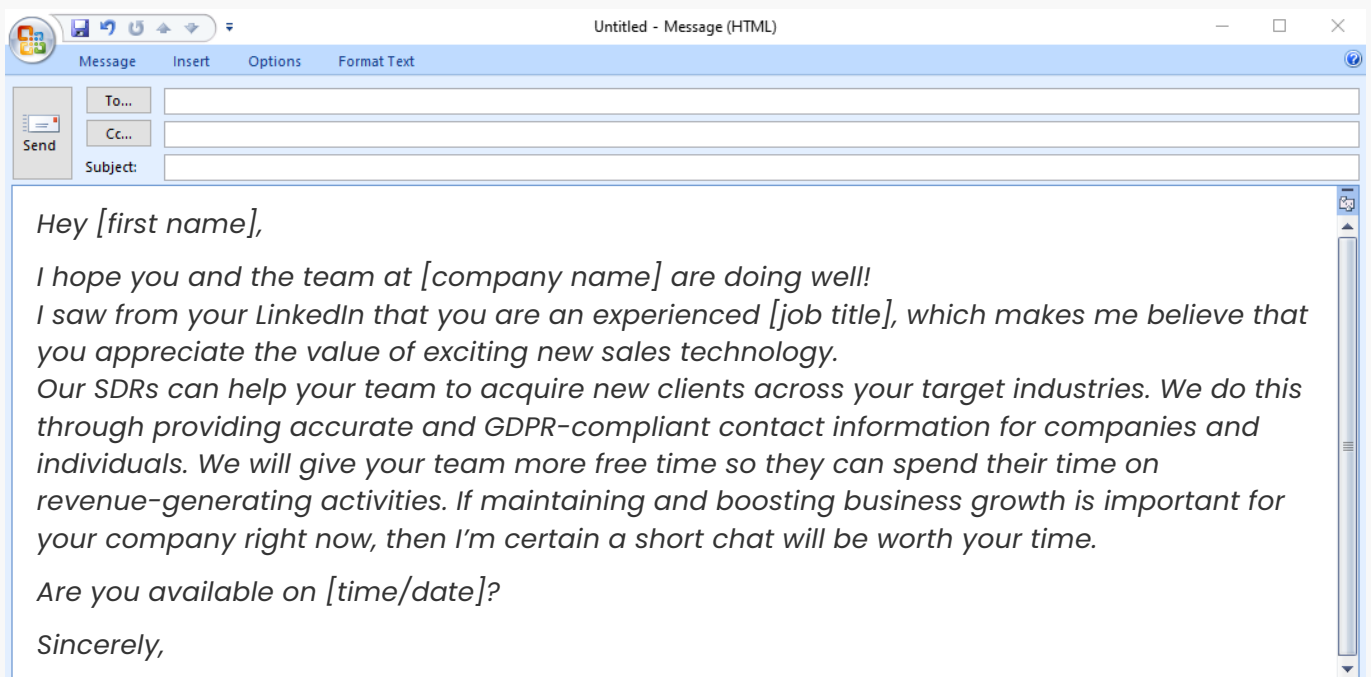
The purpose of the cadence

WALTER:

"We were going for a multi-touch approach when we developed this cadence." "Most people are working from home now, so it's become much more difficult to reach them through cold calling. Also, a lot of people are uncomfortable speaking to cold callers or picking up numbers they don't recognize." "You want to engage with prospects on a platform they are comfortable with, whether that is phone, email, video or LinkedIn. This is what we kept in mind when we were testing our cadence."

DAY #1 – Personalized email

On the same day, the LinkedIn connection request is followed by a personalized email. Here's an example from Rebecca Doane, a copywriter at CAP Digisoft.



Walter shared his thoughts on the importance of personalization:

WALTER:

“Every communication channel open to SDRs is extremely competitive. Emails and LinkedIn messages are sent every hour of every day by other SDRs, to stand out from the crowd you need to personalize everything.” “Bring in some humor or any method that will help you get a friendly conversation started. Be different from everyone else by showing empathy to your prospects and respecting their time. You never know how busy they are or what they’re going through.”

DAY #1 – Call

If the LinkedIn connection was successful and you obtained the prospect’s phone number, you should try calling them on Day 1.

Walter had this to say about the cadence and cold calling:

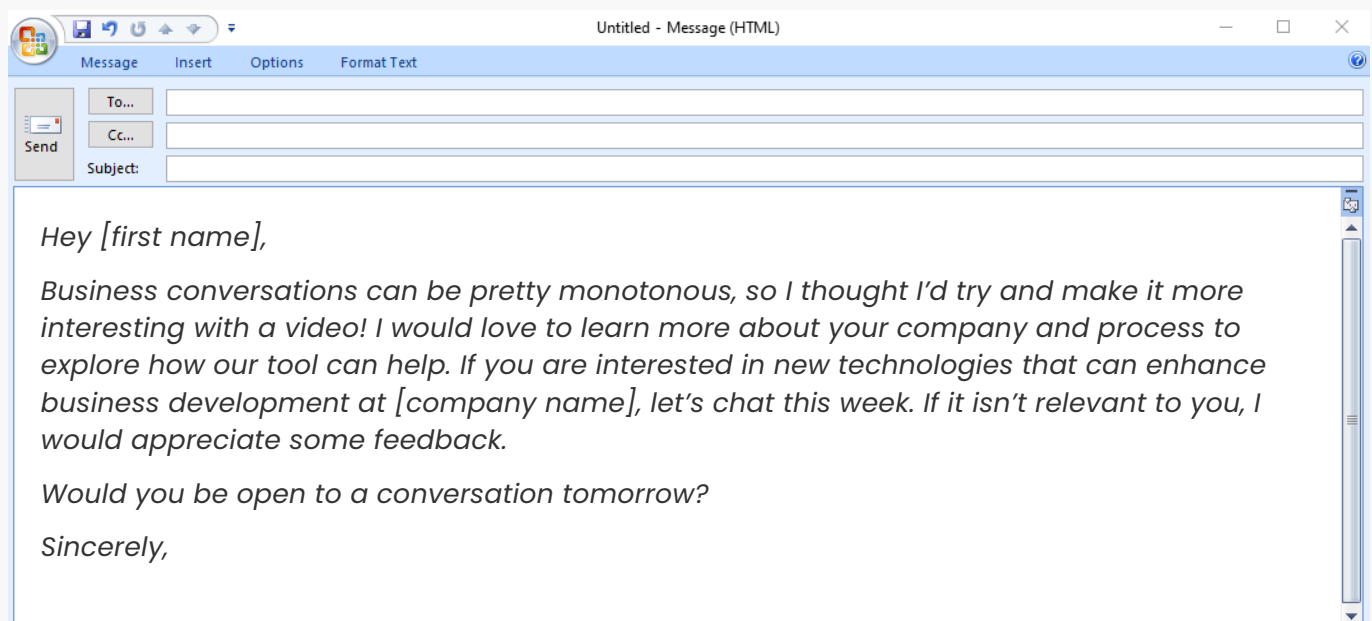
WALTER:

“50% of cadence is often through the phone. However, we eliminated a good amount of cold calling in our cadence because we found the connection rate had dropped from 10% to 4%. Don’t assume that there is no point in calling though, it is still important, but it must be done strategically.”

DAY #3 – Personalized email with a video

On the third day, our SDRs follow up with a personalized email, including a video message.

Yasmin Gracias, Growth Team Manager, uses this messaging:



What's the reasoning behind including a video message?

WALTER:

"A video message is another great way to stand out. It adds even more personalization to an email and people tend to be more engaged watching a video than reading an email. The prospect will be able to see the effort you put into connecting with them" "At CAP Digisoft, we encourage our SDRs to try any method that will capture the prospect's attention. Sending a personalized video can be extremely effective in achieving that."

DAY #6 - LinkedIn voice note

One method that Walter was eager to tell us about is the use of LinkedIn voice notes. It is now a core feature for LinkedIn prospecting at CAP Digisoft.

WALTER:

"By the sixth day, we suggest that our SDRs send a LinkedIn voice note to their prospects. We do this because we observed a 50% increase in response rates for voice notes." "Just like sending a personalized video, a voice note can quickly start a conversation. People feel a lot more comfortable and connected when they hear the person's voice that they are chatting with. It is important to take advantage of this psychological effect in order to more effectively connect with your prospects."

DAY #9 - Call

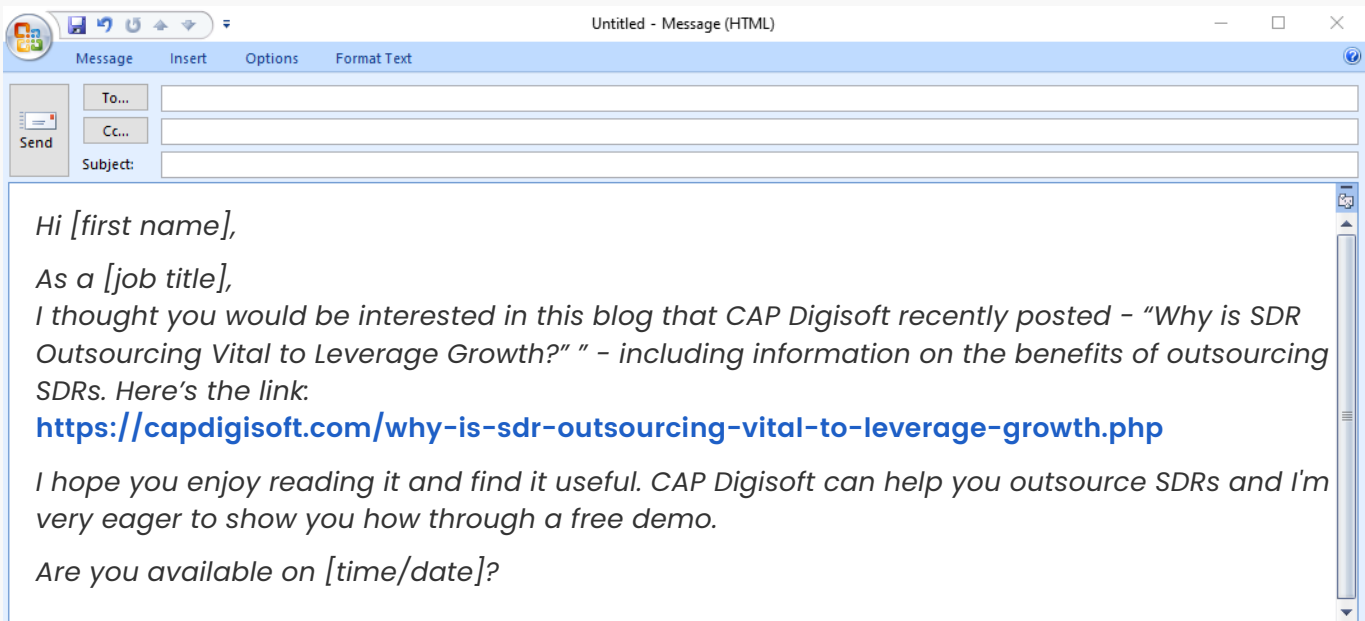
Walter had some cold calling advice to share:

WALTER:

"When you're sending Videos and LinkedIn voice notes, don't forget about cold calling. It's still an effective and important method for engaging prospects and closing deals. You should ensure that cold calling is a main connection method in your cadence. At CAP Digisoft, we've observed the impact cold calling mobile numbers has on connection rates, this method can raise connection rates up to 80%."

DAY #12 – Personalized email

Here's an example email from this step in the cadence – supplied by Yasmin Gracias, Growth Team Manager.



Walter relayed to us the thinking behind an email like this.

WALTER:

“We like to remind our SDRs to add a creative flair so they can stand out in their communications with prospects. Don’t write anything basic that seems like small talk or filler. Thankfully, the marketing team at CAP Digisoft is extremely competent in producing content that’s relevant for our target prospects.” “ We encourage our sales people to share content because it shows that they’re enthusiastic and genuinely interested in deepening the business relationship. As long as the content they send is relevant to the prospect’s company or industry it can take on any form. For example, a blog, case study, or webinar. ” “If you express a desire to add value to the prospect then they are more likely to pay attention.”

DAY #20 – LinkedIn research (e.g. like/comment on an article)

If you haven’t had any success by day twenty, you must remember to not give up. One method that is quite effective is to check if your prospect has posted or shared anything recently on their profile. If they have you will want to make a comment relevant to what they shared/posted.”

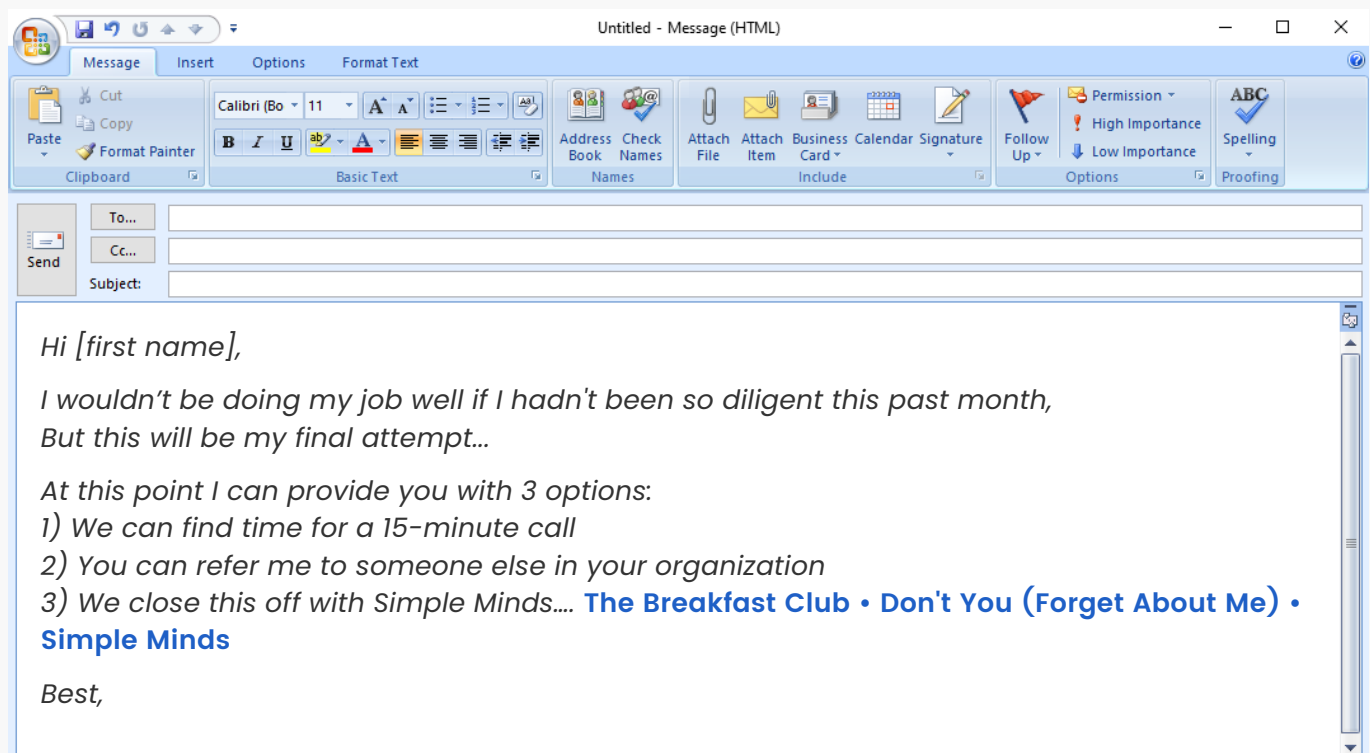
Over to Walter for his thoughts on this:

WALTER:

“Numbers are the key in sales. The more connections you make, the more likely you are to have a win. Our cadence is designed to maximize the connection points with a prospect and maintain high levels of engagement.” “ While commenting on a LinkedIn article or post may seem insignificant, it can actually really help you engage with your prospect, especially if said prospect uses LinkedIn frequently. ”

DAY #30 – Breakup email

If you had made zero progress by the thirtieth day, it’s time to send the breakup email. Here’s an example from Walter Lopez:



We asked Walter for his tips on crafting a great breakup email.

WALTER:

“Composing breakup emails can be hard and feel awkward. The trick is for it not to be a 100% clean break. Always try to get the prospect to refer you to someone else in their company. It doesn’t hurt to ask.” “It’s also good to get a definitive answer, so no beating around the bush, try to find out for certain if they are interested or not. The worst answer is ‘maybe’ because it wastes your time. If the prospect answers that they are not interested, then you can qualify them out and move on.”

Conclusion

We hope our outbound prospecting playbook proved to be of some value to you. We'd like to thank all of our Growth Center contributors for imparting their knowledge.

We want you to remember one final piece of advice when it comes to outbound prospecting: be persistent! Breaking through to a prospect can take months or even years so don't give up.

By following the steps in this playbook, you're well on your way to creating a strong prospecting process for your organization. If you are persistent in applying that process you will certainly see positive results. Good luck!

Send us your feedback

If you have any comments/feedback about this playbook, please connect with us on Facebook or LinkedIn. We love to hearing from our customers!