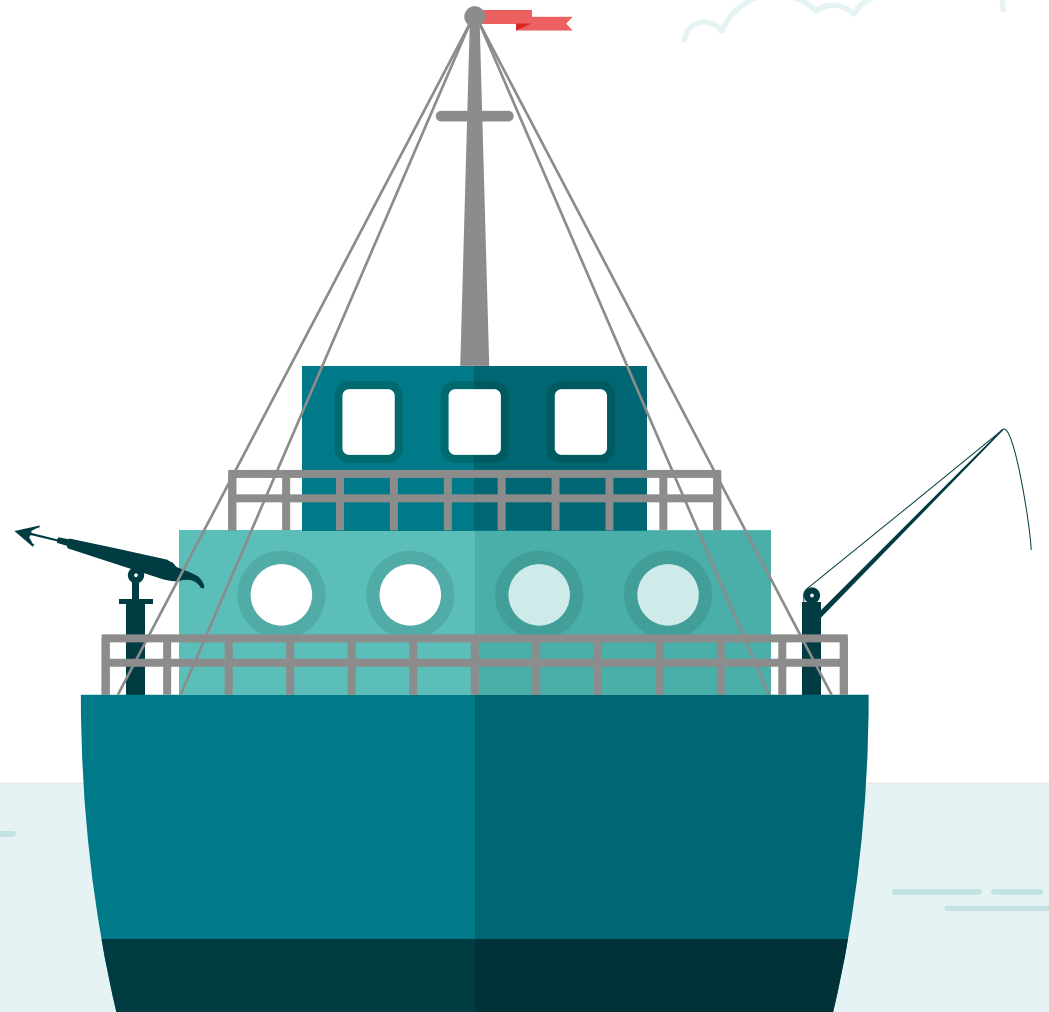# .ıEngagio

The Clear & Complete Guide to
Account Based Sales Development

Your guide to smart prospecting in
an Account Based Everything world
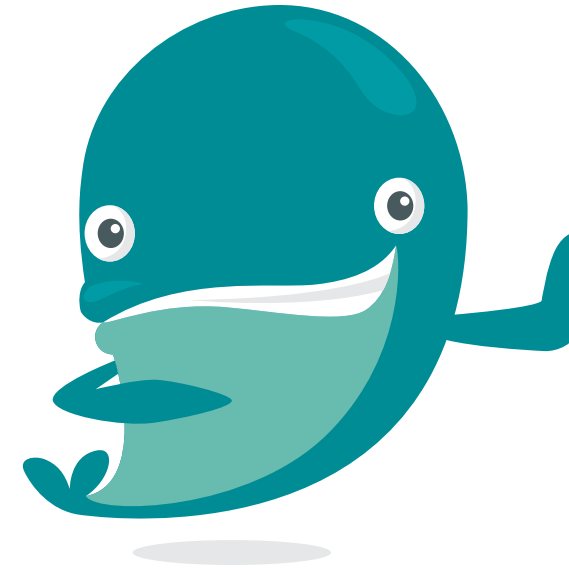
Contents

Introduction
A bold strategy for companies that don't want to wait around for revenue to show up

There's never been a more exciting or a more rewarding time to be in B2B sales & marketing. After decades of hunch-based, adrenaline-fueled, Hail-Mary revenue generation, we're entering a completely new era. An era steered by strategy, tuned by technology and driven by data.

It's all coming together *right now*, as you're reading this sentence – a perfect storm of innovation that's giving enlightened companies an unprecedented degree of control over their own fortunes (and an unfair advantage in the marketplace).

We've already experienced Phase One—a wave of transformation in the people, processes and technologies that create and convert opportunities:

- **In marketing** – ideas like marketing automation, inbound tactics, content marketing, lead scoring and nurturing have re-invented demand creation
- **In sales** – the increasing specialization and professionalization of sales development is replacing cold calling with intelligent, laser-targeted prospecting

- **Across both** – the lead-centric approach is giving way to an account based strategy that aligns everyone around the deals that matter most

Put all three of these together and a hugely exciting model takes shape. And it works: the companies following this new model are growing like wildfire and running circles around their old-school competitors.

Pick any B2B company that has experienced insane growth over the last 12-18 months. Chances are, they're using the strategy that you're about to discover.

This is Account Based Everything (ABE) – and it's driven by a new incarnation of the sales development discipline. Today, what used to be called prospecting, inside sales, telesales

or business development is giving way to a far better mousetrap: Account Based Sales Development (ABSD).

That's what this is all about: a new sales development role that lives at the center of a coordinated, integrated Account Based Everything approach.

If you're in marketing, sales or sales development, this is the beginning of an exciting new phase of your career.

Hang on to your hat.

A new kind of sales development

A new kind of sales development

In some form or another, sales development has been around for a long time. In fact, some of the world's most famous companies (like Salesforce.com) were built on it.

The idea of breaking out a specialized sales development role from the Sales department is based on unassailable logic:

- It focuses Account Executives on what they do best: closing deals
- It professionalizes the process of opportunity creation and qualification – giving the job to people who are especially suited to it
- It boosts sales productivity, accelerates growth and lowers costs at the same time

At the start, the sales development role combined both inbound opportunity qualification and outbound prospecting efforts. It was a big step and the companies that pioneered it grew at impressive rates. But it was only the beginning.

"Throughout history, specialization has been the breakthrough to better techniques. It allows people to excel at a few specific tasks."
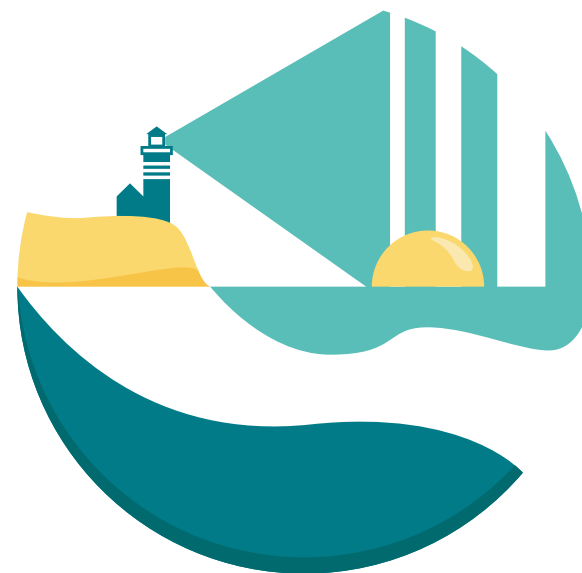
Ken Krogue
President and Founder,
InsideSales.com

"For many companies, sales development reps are the first line of human contact with prospects."

Trish Bertuzzi
The Sales Development,
Playbook

A simple model

Traditional sales development was not particularly sophisticated:

- Hire hungry, ambitious young people
- Stick them on a bank of phones
- Give them big, broad lists of people to call (and/or inbound contacts to qualify)
- And stand back

It was a blunt instrument, but it worked *a lot* better than asking Account Execs to waste their time hunting for opportunities.

Two big developments
Today, sales development has become much more focused and dramatically more effective.

The new sales development discipline has been well evangelized by the people who pioneered it, in books such as *Predictable Revenue* by Aaron Ross and Marylou Tyler; *The Sales Development Playbook* by Trish Bertuzzi; and *From Impossible to Inevitable*, by Ross and Jason Lemkin (we highly recommend all three).

The transformation in sales development has been driven by two big developments:

1) Separating inbound from outbound
Just as sales development itself is a specialization, the new version takes it one step further: creating two teams with very different goals

One team focuses on responding quickly and efficiently to inbound interest created by marketing (email, advertising, the web, etc.).

The other focuses on creating opportunities using outbound tactics (primarily phone and email – more on this later).

Both teams are important. But both involve different skills and different tactics.

"59% of sales development organizations create specialized teams for inbound and outbound."
TOPO: The 2016 Sales Development Benchmark Report

A recent Bridge Group study showed that inbound/outbound role specialization resulted in a 16% increase in Pipeline Power Score (their metric for revenue generation efficiency and effectiveness)

"Sales development specialization is an accelerator on the path to repeatable and scalable pipeline."
Trish Bertuzzi,
The Sales Development Playbook

A simple model (cont'd)

2) Focusing the outbound team on key accounts
The split of sales development into two teams coincided with the rise of a powerful strategy: an account based orientation (instead of a lead-centric one).

While inbound teams are heavily weighted to smaller companies (there are just many, many more of them), outbound teams can be focused wherever they'll make the most impact. For any company chasing big deals, the natural focus for outbound sales development teams are the top tiers of named target accounts.

And when that happens, a new kind of machine is born.

This whole book is about the collision of outbound sales development with account based thinking. But for now, think of it this way: creating and training an entire team of specialists whose only job is to penetrate big, named accounts, is a very big idea indeed.

By the end of this book, we think it's an idea you're going to want to pursue. But first, let's track back and cover the critical context of the new sales development approach: account based thinking.

"As soon as the account based model takes hold, it leads to more personalization and more human touch. Sales development is the natural place for that."

Craig Rosenberg
Co-founder and Chief Analyst, TOPO

"If you want to go upmarket, which you absolutely must to grow, you have to go outbound. Winning large customers is much more about causing a sale, not just catching one."

Ken Krogue
President and Founder, InsideSales.com

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Part 2

The rise of account based thinking

Part 2
The rise of
account based thinking

The rise of account based thinking

As we detailed in our earlier (and rather awesome) ebook, The Clear & Complete Guide to Account Based Marketing, thinking of *accounts* instead of individual *leads* is hotter than a hot thing in an oven full of heat.

The first wave of account based strategies were grouped under the misleading name account based marketing (ABM) – probably because Sales had *always* thought in terms of accounts, while the idea was new for marketing (whose core processes and tools were built around leads).

Regardless of where it sat, account based thinking took off because it's exactly what most B2B companies need most:

Buying teams are getting bigger
According to CEB research, the average buying team today includes 5.4 people. With increasing risk aversion, technology complexity and compliance concerns, few experts see this shrinking any time soon.

As every sales pro knows, the bigger the team, the less likely they are to end up buying. After all, it only takes one veto to kill a sale (or one person on holiday to stop a deal in its tracks).

This risk is far higher if you're tied to a lead-centric approach, talking to single individuals in isolation. Clearly, winning big deals today means working the entire account.

Work the whole account or lose the deal
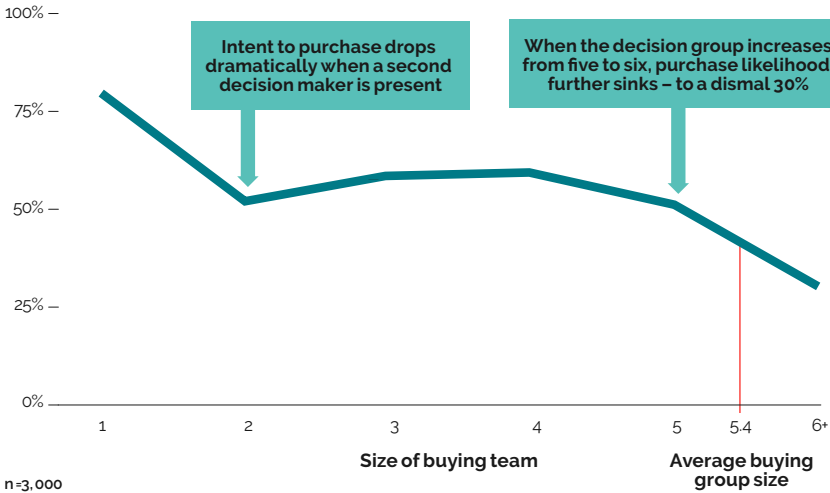
Purchase intent, by buying team size. Percentage of respondents stating "we will definitely buy from this supplier in the next six months" (Answer 8, 9 or 10 out of 10)

Source: CEB analysis

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The rise of
account based thinking (cont'd)

Part 2
The rise of
account based thinking

Big deals build big businesses
For most B2B companies, Customer Acquisition Costs and Lifetime Value economics are far more compelling in the enterprise market. And for many, big deals are worth 10-20 times more than the average deal size. These are company-making deals and they're worth building a sales and marketing strategy around.

Inbound can only get you so far (or so fast)
As powerful as inbound marketing can be, 'fishing with nets' will always catch a lot more small companies than big ones (there are far more of them out there).

More importantly, inbound programs take 6-9 months to start seeing results and a full 12-24 months to start seeing significant value. For a new product or line of business, you have to start that process all over again.

Most companies simply don't have the luxury of waiting for the lead-centric inbound model to ramp up. Outbound, account based efforts are a much faster route to revenue.

Finally, even companies that have already established their inbound machine are finding that they're starting to reach saturation. It's just far more crowded out there and everyone is competing against a lot more content aiming at the same audience. For many, inbound is starting to see diminishing returns.

The pioneers proved the model
Reports from the front lines of account based programs have been astonishingly positive. Account based programs have been shown to yield the highest conversion rates and greatest revenue growth of all the programs they run. And the wider sales and marketing community has taken notice.

Account based marketing delivers the highest Return on Investment of any B2B marketing strategy or tactic. Period.

ITSMA

Part 2
The rise of
account based thinking

The benefits of account based thinking

Our Clear & Complete Guide to ABM outlines the industry's consensus on the benefits of an account based approach. We won't repeat it here… but we will summarize it:

Efficiency
It focuses time and resources on accounts most likely to drive revenue.

Big wins
The deal sizes are bigger.

Close rates
It increases the *quality* of your biggest opportunities.

Acceleration
Deals proceed faster when you coordinate efforts around them.

Alignment
It tightly integrates your sales and marketing teams.

Sales excellence
It enables the challenger sale.

Customer experience
It delivers the consistently relevant experience that customers demand.

Account penetration and expansion
It guides intelligent account expansion at existing customers.

Not a bad business case!

The benefits of account based thinking (cont'd)

Part 2
The rise of
account based thinking

We don't need to hammer home the argument here: the power of an account based approach has been accepted by virtually every progressive sales and marketing leader – and is being put into practice by every high-growth B2B company that isn't selling exclusively to small businesses.

Now it's time to apply it in new ways…

Part 3

Account Based Sales Development: two big ideas brought together

Part 3
Account Based Sales
Development: two big
ideas brought together

A big idea

We've seen the rise of the specialist sales development role and the new focus on the outbound side of the discipline. And we've seen the rise of account based thinking. Now it's time to put them together.

Account Based Sales Development is a coordinated strategy that combines personalized, multi-channel, multi-threaded, outbound activities to create high-value opportunities in new and existing customers.

Part 3
Account Based Sales
Development: two big
ideas brought together

A big idea

Account Based Sales Development is a coordinated strategy that combines personalized, multi-channel, multi-threaded, outbound activities to create high-value opportunities in new and existing customers.

It's all about the orchestration between marketing, sales development and sales

Built on relevance and value for each individual in the buying team

Targeting the entire buying team as a *team* – not as isolated individuals

It's just as powerful for customer success as it is for acquisition

Much more sophisticated and effective than 'hitting the phones' or blasting out emails

ABSD never sits back and waits for opportunities: it goes out and creates them

The big deals that fuel hyper-growth

How ABSD differs from traditional sales development

Part 3
Account Based Sales
Development: two big
ideas brought together

Account Based Sales Development is a huge step from the original telesales 'boiler rooms':

· **It's targeted** – aimed at selected, named accounts, not huge, undifferentiated lists
· **It's personalized** – based on relevant, crafted conversations instead of standard, one-size-fits-all scripts
· **It's researched** – driven by systematic insight generation (not two minutes on LinkedIn)
· **It's multi-channel** – maximizing reach by using all channels, not massive spamming campaigns
· **It's integrated** – a coordinated effort supported by marketing – not another silo
· **It's patient** – with less emphasis on short-term calls-to-action such as demos and more on high-value engagements such as meetings to share insights or trends

TOPO Research, one of the pioneers of account based thinking and the new sales development discipline, puts it this way:

"Unlike 'batch and blast' outbound sales development in which SDRs send large volumes of template-based messages, Account Based Sales Development is personalized to the account and person receiving the message."

According to their 2016 benchmark study, 45% of sales development teams today are already account based (even if not fully evolved); 27% are partially account based; and 28% are 'greenfield' (reaching out to the whole market). Three years ago, these numbers would have been reversed. ABSD is the new SD. TOPO again:

"Account Based Sales Development is today's most effective account based tactic… Rather than rely on the high-volume process of outbound prospecting, organizations now strategically define a smaller, more targeted set of accounts and run personalized, buyer-centric campaigns against those accounts."

"The new Account Based Sales Development leaps ahead of yesterday's siloed sales development."

Kristina McMillan
Sales Development Practice Leader, TOPO

Part 3
Account Based Sales
Development: two big
ideas brought together

When ABSD makes sense

Account Based Sales Development isn't the answer for every B2B company or every challenge. But if the following things are true for your business, ABSD is probably your best bet:

When big deals matter
If big deals are 10-20 times bigger than average deals, ABSD is a no-brainer. These big deals don't just *justify* the effort, they *demand* it.

When you can identify your ideal prospects
If you don't yet know which accounts might buy, you may not be ready for ABSD. If you do, and can name them, you're ready.

When your deal sizes are six figures
ABSD is *required* for $100k-plus deals. And it's a really good idea for $50-100k deals. Below £20k are probably too small.

When you need sales efficiency
If boosting your opportunity-to-close rates would make a big impact, you want ABSD.

But if your sales team just needs more at-bats and the *quality* or size of opportunity is not the issue yet, you may need to wait a while (after all, even low-probability opportunities are better than none!). Hopefully this state won't last long.

When you're selling across disciplines
Big, multi-disciplinary buying teams can kill a deal faster than you can say, "Bob doesn't like it." The more people involved in making or influencing a purchase, the more you need ABSD.

When inbound just isn't fast enough
When you can't sit around waiting for great deals to get swept up into your demand-gen nets – or when your inbound efforts are starting to see the diminishing returns.

"There's still a place for what we call greenfield [not account based] sales development. If you can sell to a broad range of customers, it can still make sense. But as soon as you've got a focused ideal customer profile, account based is the way to go."

Craig Rosenberg
Co-founder and Chief Analyst, TOPO

The Tiger Team
Some companies sell to lots of small- and mid-size customers as well as to big enterprises. For this kind of mix, we're seeing a two-pronged approach: a general sales development effort for the wider market and a specialist, 'tiger team' for landing the big accounts.

Q&A

Part 3
Account Based Sales
Development: two big
ideas brought together

Matt Amundson, Vice President – Sales Development & Field Marketing, EverString

What do you look for when you're hiring an SDR?
For me it's all about prioritization and time management. The capacity to transition from one account to the next – from one message to the next – and maintain focus.

So I look for nuance and breadth of experience in grads – people who balanced studies with sports, or worked their way through school. That's more important than grades. Like salespeople, SDRs are determined type-A personalities, but they also need to be creative enough to craft a thoughtful, personalized message that resonates even when it's cold.

And I do like it when they're straight out of college, so they don't have to un-learn any other companies' sales methodologies.

Do you think a 100 percent ABSD strategy is the ideal, or is it a mix of lead based and account based?
From an outbound sales development perspective, yes I'd say it should be 100 percent account based. Even in high-velocity, commoditized markets, if you don't know that the person you're calling is a good fit for you, it's a wasted call.

The cost of the false positive may be very low (versus the high cost of a false negative), but if you have the right structures in place, it's worth spending time to personalize your approach.

And you get round one of the biggest problems with lead based sales development that says if you can't get through to your lead then you've hit a wall. With an account approach, you have other avenues that can take you to the account.

What would you say to organizations that might think they're too small to adopt a ABSDR approach?
The magic in combining account based marketing and sales development is that smaller organizations can build pipeline to support sales team faster than ever before.

In the past, building a strong inbound engine was a numbers game, like fishing with a wide net. It required some brand awareness and a level of commoditization – not to mention the ability to build a strong marketing team, which is hard in itself. You needed all three, and it didn't happen overnight.

With an account based approach to marketing and sales development, you expedite the process by a huge factor. With a strategic plan and a personalized story, you get to the people who make buying decisions, fast – you trade your net in for a spear.

Silos don't work in an account based world

Part 4
Silos don't work in an
account based world

Silos don't work in an account based world

The pioneers of account based approaches in general – and Account Based Sales Development in particular – have all come to the same conclusion: it works best in companies where all the revenue-generating disciplines are closely aligned.

In short: silos suck.

For this reason, the term 'account based marketing' is misleading and the wrong term to describe the process we're talking about. There's a danger that it perpetuates the siloed marketing that's holding us back.

What really works in the account based model is the close integration of marketing, sales development and sales (plus customer success for those who have the discipline).

Teams that work in isolation are the ones that miss opportunities; duplicate efforts; waste insights; drop the ball in clunky 'handovers'; and inhibit every important metric from close rates to deal velocity.

In contrast, teams that work together in coordinated programs that target key accounts are dramatically and measurably more efficient and effective.

Don't do this alone

Part 4
Silos don't work in an
account based world
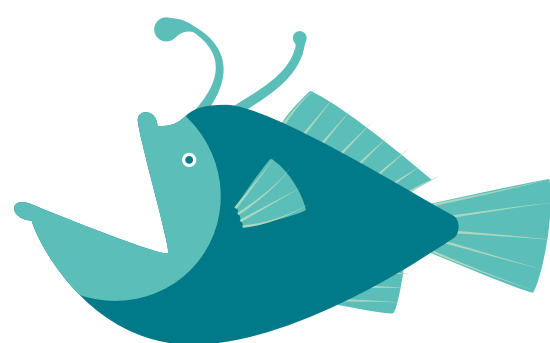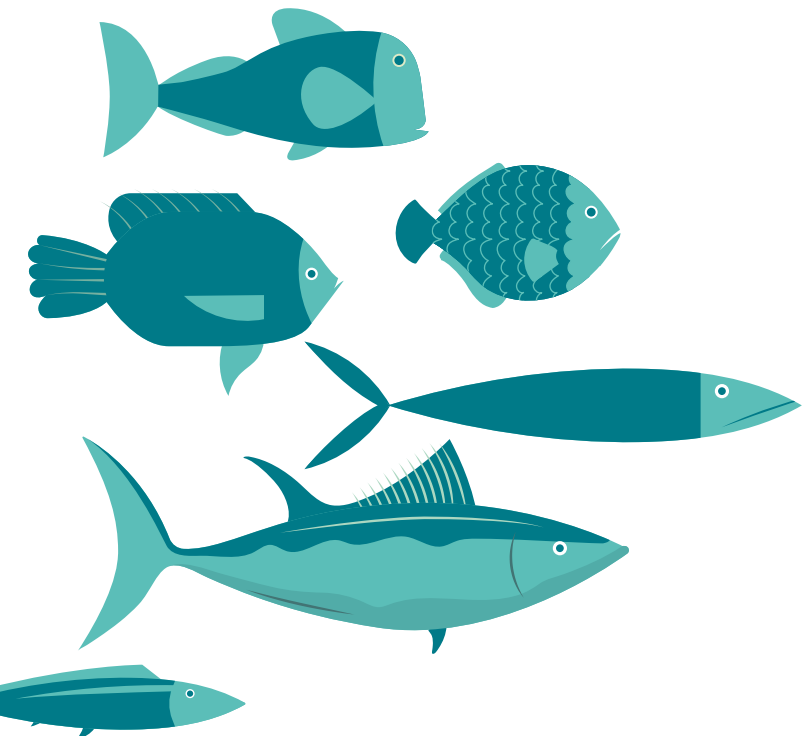
If Marketing embraces ABM without a deep alignment with Sales, you get isolated tactics like ad retargeting and fancy mailers or field events that Sales doesn't care about or participate in.

To really engage with a target account, the human touch is essential: someone needs to pick up the phone, send a personal email or make a real connection on social channels. Only then can the account-focused marketing tactics make an impact.

Similarly, Account Based Sales Development without support from Marketing leads to a bunch of junior reps generating their own accounts and writing their own emails – then doubling the volume to try to improve performance.

Finally, account based sales in isolation results in Account Executives wasting their time in prospecting without any support or leverage. That's expensive and inefficient.

What works is integration. That's the heart of any account based strategy.

"ABM is a strategic business initiative. If it's only sponsored by Marketing, it becomes a campaign."

Jeff Sands
ITSMA

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Part 4
Silos don't work in an
account based world
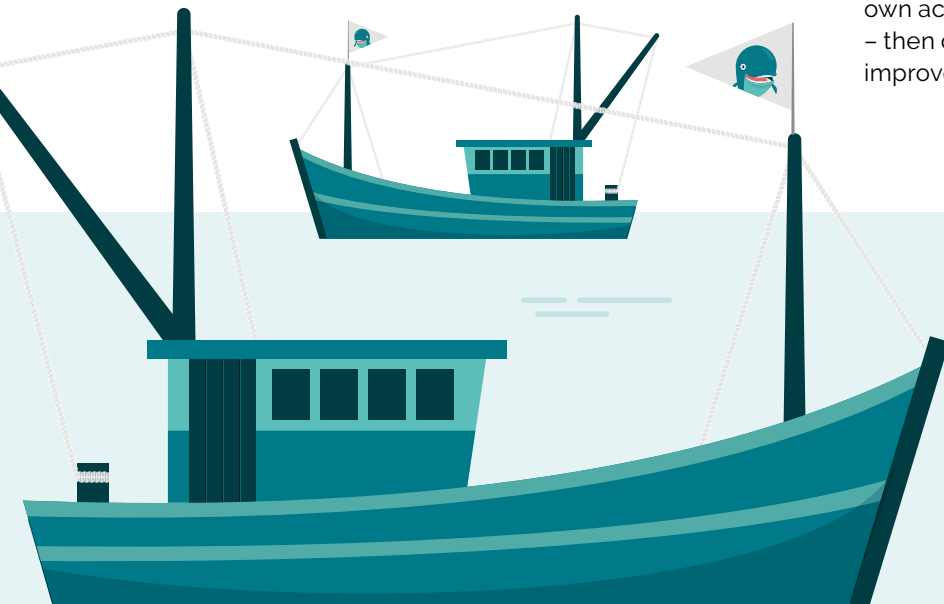
What if you're not aligned yet?

On the account based journey, total alignment is the goal. But the important thing is to always make progress towards it. You can't stop your revenue machine, hold everything and wait until you've achieved perfect alignment. So get going now:

Start with an alignment workshop – sit down together and discuss the account based approach and why you need to change the way you work.

Define your ideal accounts – make sure you're all aiming for the right deals.

Agree on key metrics and SLAs – agree on what good looks like, what metrics you'll track and what commitments you'll make to each other.

Build a foundation – implement an account-centric data infrastructure, including things like lead-to-account matching.

Meet regularly – to review processes, metrics and progress.

Use common data and technology platforms – avoid silo systems!

Part 5

Hello, Account Based Everything

Hello, Account Based Everything

Because silos hold back account based success, more and more sales and marketing leaders are no longer talking about account based marketing, they're talking about Account Based Everything.

Account Based Everything is a strategic go-to-market approach that orchestrates personalized marketing, sales, and success efforts to drive engagement and conversion at named accounts.

Hello, Account
Based Everything

With ABE, nothing is random: it's a systematic go-to-market strategy. Not a campaign

An integrated program that aligns all revenue-generating teams

Always a super-targeted effort targeting big prospects and existing customers. Never 'spray and pray'

Account Based Everything is a strategic go-to-market approach that orchestrates personalized marketing, sales, and success efforts to drive engagement and conversion at named accounts.

Delivering a consistent buyer experience, with clear, consistent messaging from each department and in every channel

For acquiring new clients *and* existing customer expansion

Account Based Everything

The essence of the Account Based Everything (ABE) strategy is coordinating relevant interactions that span **multiple players** in the account (decision makers and influencers) and **multiple channels** (email, phone, social and demand gen)

delivered by **all departments** (Marketing, Sales Development, Sales, and Customer Success). When you can do that, the results will always be greater than individual departments working in isolation.

Account Based Marketing

Account Based Sales Development

One central account based view

Account Based Sales

Account Based Customer Success

"This isn't about account based marketing campaigns or sales tactics, this is Account Based Everything."

Craig Rosenberg
Co-founder and Chief Analyst,
TOPO
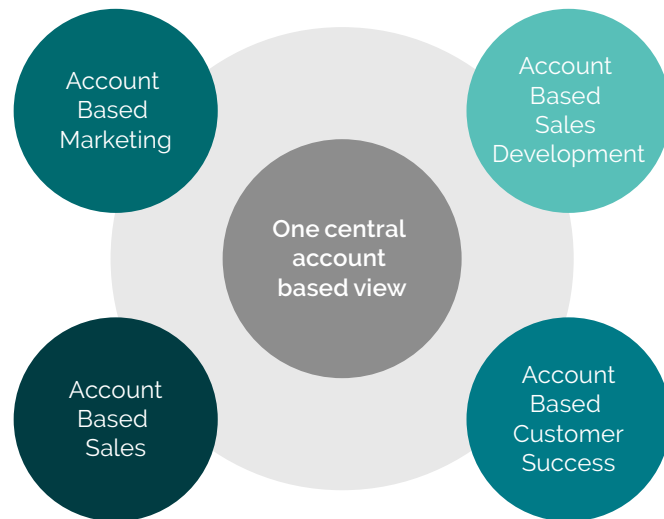
"Account Based Everything recognizes that it takes a village to zero in on key accounts; that all functions must be integrated, from marketing to sales development, sales and customer success."

Tom Scearce
TOPO

ABE and the three critical revenue objectives

Account Based Everything isn't a specialized strategy to keep in a box in the corner. As TOPO research slide shows, it's a strategic initiative that addresses the three most important revenue objectives of any B2B company:

New customer acquisiton
Helps acquire new customers, particularly high value targets

⌄

Pipeline velocity
Accelerates velocity of existing opportunities at target accounts

⌄

Account expansion
Drives expansion (upsell + cross-sell) at existing accounts

The ABE effect
Companies that implement ABE see some unexpected effects:

Morale rises as you escape the discouraging 'hamster wheel' of high-volume, low-engagement tactics.

Performance improves as it takes far fewer leads to secure an appointment.

The voracious need for net new leads decreases as you waste less time on low-potential situations and invest more time in relevant interactions.

Mutual respect grows as everyone in sales and marketing recognizes the value and contribution of their colleagues.

You learn faster as more of your team gets direct engagement with the people who matter most.

You grow faster taking the big revenue steps that only big deals can deliver.

You scale up based on success, with your costs rising directly with your pipeline.

In short, the transformation to an ABE approach is essentially the culture change that sales and marketing have been waiting for.

"Adopters of an Account Based Everything strategy are seeing significant lift in engagement rates, pipeline per account, and upsell/cross-sell numbers."

Craig Rosenberg
Co-founder and Chief Analyst, TOPO

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Inbound + Outbound = Allbound

The rise of Account Based Everything has sparked a debate between the virtues of inbound versus outbound models. This is as good a time as any to try to put this argument to bed.

For the most progressive leaders in sales and marketing, 'inbound vs outbound' misses the point. Both can be important to the growth of a B2B business, but they do very different things and require different processes and skills.

Inbound is an always-on strategy that urgently responds to demonstrated buyer intent.

Outbound is a thoughtful outreach strategy that crafts and coordinates targeted messages to named accounts.

The problem with inbound only

In the early days of digital demand-gen, some companies evangelized an all-inbound model. That approach has serious limitations:

Inbound takes a long time to scale – anywhere from 1-2 years, as discussed above.

Sales gets dependent on leads – a dangerous dependency.

Inbound marketing can get saturated – with less return on incremental investment.

That said, the answer is NOT to stop inbound efforts: they're too important for that and, once up to speed, create a flywheel effect that is an important growth driver.

The benefits of outbound

The excitement surrounding the rise of inbound marketing blinded many B2B companies to the power of outbound. Now it's back in the spotlight, and for good reason:

Outbound delivers big wins faster – because it's more targeted and more proactive.

Costs vary with pipeline – double your efforts and you double your output (which doesn't happen with inbound).

There's zero waste – all your effort is focused on the accounts that matter.

You reach higher in key accounts – with inbound, you're at the mercy of who comes to you (usually junior people looking for competitive bids). With account based outbound you reach out to senior decision makers with a solution focus. That leads to more strategic deals and can even avoid competitive bake-offs.

The revenue is stickier – smaller, inbound deals are more likely to eventually churn than larger more strategic deals.
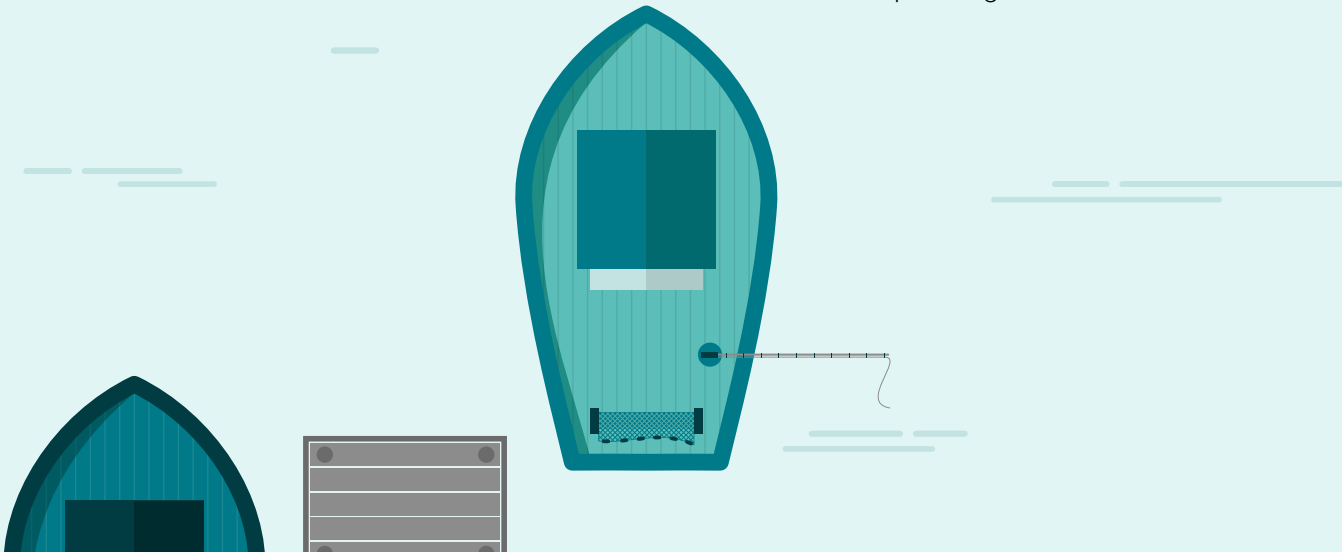
The answer is Allbound

When asked whether inbound or outbound is important to your company's growth, just say, "Yes". The fact is, they both are.

"After 18 months of building the outbound SDR team, outbound accounted for 35% of new ARR. Outbound can make a huge impact in a relatively short time, especially if there's already significant inbound traction."

Robby Allen
Director of Sales Development, Zenefits

"An optimized balance of inbound and outbound marketing techniques, i.e. "Allbound marketing", consistently generates high quality leads that ultimately produce revenue."

Dan McDade
President and CEO, PointClear

Allbound combines the best of inbound with the best of outbound, deploying each strategy where it makes the most impact.

	Account type	Pipeline KPI averages*	Works best when
Outbound	Large: strategic/enterprise	Influenced: >75% Sourced: <10%	• large deal sizes • Defined targets • Aligned sales and marketing
	Named/territory	Influenced: 60-75% Sourced: 15-25%	
Inbound	Small/midsize and non-named	Influenced: 50-60% Sourced: 25-45%	• Smaller deal sizes • Broad targets
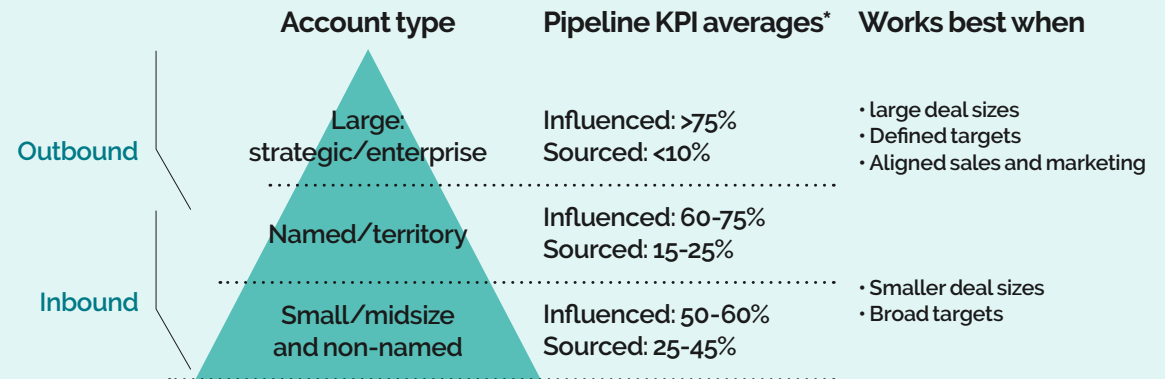
Source: *SiriusDecisions

Pause for breath...

Okay, we've seen the emergence of two big ideas: a dedicated sales development role and an account based approach to revenue generation.

And we've seen why it's so important to build your Account Based Everything strategy on an integrated sales, marketing and customer success team (instead of a silo).

We've seen that a specialized Account Based Sales Development role is a coordinated, multi-channel, *outbound* effort that doesn't replace but *complements* your existing, inbound lead-generation.

For the rest of the book, we'll drill down into the Who, What and Where of ABSD – a deep dive into the engine room of your ABE strategy. We'll also show you how to build a team, coach them for success and run a successful ABSD operation.

Get this part wrong and you may find yourself spinning your wheels a bit.

Get it right and you've strapped your company to a rocket.

Part 6

The WHO, WHAT and WHERE of Account Based Sales Development

The WHO, WHAT and WHERE of Account Based Sales Development

Our discussion of best-practice Account Based Sales Development follows a simple, Who/What/Where framework:

Who do you need to target?

What will you do to get their attention and interest?

Where will you engage with them?

Account Based Sales Development flips the funnel

DEMAND GEN

What do we want to say? (offers) → **Where** should we say it? (channels) → **Who** should we say it to? (segments)

ABSD

Who are we trying to reach? (accounts) → **What** should we say? (content) → **Where** should we say it? (channels)

Traditional demand generation starts with 'what do we want to say?'.
Account Based Sales Development starts with the buyer and works up from there.

The WHO of Account Based Sales Development

The WHO of Account Based Sales Development

The most important decision you'll make in your ABSD strategy is the list of accounts you decide to target: The Who. The idea is simple: you need to focus 100% of your efforts on the right targets. Not 80% or 90% — 100%.

In old-school prospecting, companies let the recent graduates who populated the sales development team decide who they wanted to call. In enlightened ABSD, this is a strategic decision, made from above and at the start.

Define your Ideal Customer Profile
Your account selection process comes down to a specific definition of your Ideal Customer Profile (ICP), the companies that best match your goals. A strong definition will include the key dimensions that define the high-value accounts that are most likely to buy, including things like:

Firmographics – company revenue, growth rate, number of employees, industry, location, structure…

Pain points – Are they experiencing the problems you solve?

Technographics – What other systems do they use?

Behaviors – Do your best prospects do similar things? Past behavior is a great guide to future decisions.

Strategy – Are they pursuing a strategy that's consistent with deploying your solutions?

Region – Do you have sales coverage in their region or country?

One way to decide on your ICP is to reverse engineer your existing best customers to see what they have in common. Another is to analyze the best customers of your closest competitors: where are they winning and why?

"Most companies believe they have a solid understanding of their ideal customer profile and that it has been communicated across the organization. In reality, they have dozens of different assumptions floating around."

Trish Bertuzzi
The Sales Development
Playbook

Select your target accounts

Once you know the specific profile of an ideal account, it's time to actually pick the accounts; to name the companies you'll be targeting.

On this front, there's a maturity spectrum, with increasing accuracy and sophistication as you move up.

Level 1 is a blunt selection: you let sales reps select the accounts they feel are the best fit. Not very scientific (but better than throwing a dart at a directory).
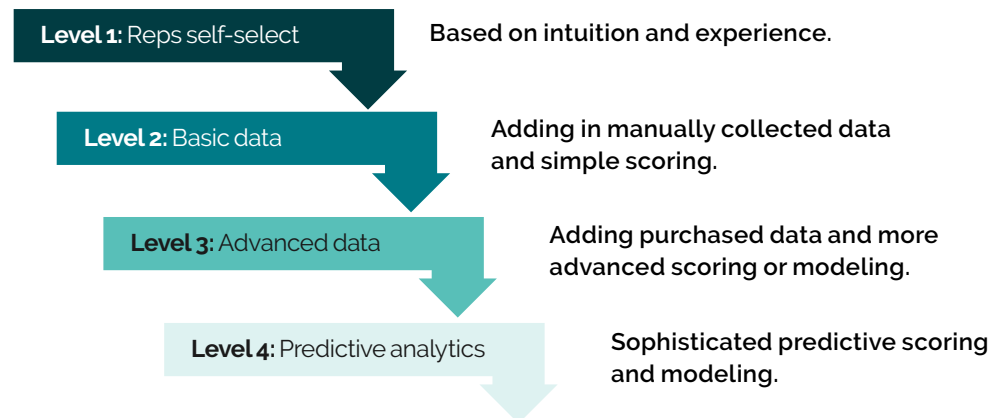
Level 2 uses basic data, collected manually, loaded into a spreadsheet and scored, to help guide the reps to the accounts closest to the ICP.

Level 3 adds in more specific data (e.g. intent, sales triggers, etc.) and adds nuance to your scoring and modeling.

Level 4 uses predictive analytics tools to crunch big data sets to drive a complex model.

Clearly, the accuracy and completeness of your account selection improves as you move up the maturity spectrum. Do what you need to do – but be advised: time, money and effort spent on rigorous account selection will be repaid many times over in the number and quality of opportunities you generate.

A very big point: it's critical to involve the Account Executive in picking the target accounts. You need their insight and their buy-in. Otherwise, you risk developing an account and bringing it to Sales – only to have them say they're not interested. They key is to develop the accounts they care about.

Level 1: Reps self-select — Based on intuition and experience.

Level 2: Basic data — Adding in manually collected data and simple scoring.

Level 3: Advanced data — Adding purchased data and more advanced scoring or modeling.

**Level 4:** Predictive analytics — Sophisticated predictive scoring and modeling.

"Data is a never ending problem. Prospectors have a clear idea of which companies should be a good fit, and which shouldn't."

Aaron Ross
Predictable Revenue

Putting your accounts into tiers

Not all accounts are the same. So you'll also need to organize your target accounts into tiers, based on how valuable they might be (and how much research and personalization will go into each one).

We'll cover this in more depth in the Research section (page 53), but for now, just think about how you might split your target accounts into tiers, applying a different treatment strategy to each tier:

Classic — 5–50 accounts ("tens")

Lite — 50–1,000 accounts ("hundreds")

Hybrid — 1,000+ accounts ("thousands")
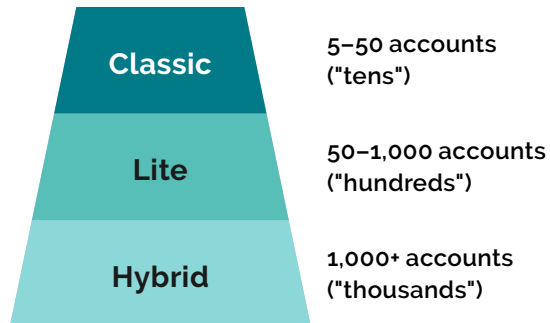
At Engagio, we advocate using a version of Account Based Sales Development for all tiers, not just the top.

Aim high
The Bridge Group clusters target accounts into four buckets:

A: A-List Accounts: The named or strategic accounts on your dream client list. The deals that can change your company.

B: Bread & Butter: Your sweet spot customers. There may be too many to identify by name (there may be thousands), but you can do it by characteristics.

C: Compelling Events: Companies in which a need is created suddenly by a trigger event.

D: Dead Ends: Companies that can't or won't buy from you.

The Bridge Group advises focusing your outbound SDRs on the A list and let the inbound team focus on B.
(To us, a case can be made for adding C accounts into the SD list if they meet core criteria.)

How many accounts should you target?

The number of accounts you choose to target for each Tier in your ABSD program – and the number of accounts per AE and SDR – will depend on things like:

- Your expected deal sizes
- The length of the sales cycle
- Your available sales resources
- Your current level of engagement with major prospects
- The intensiveness of your account based strategy

A resource view

We think the best way to select target accounts is by looking at how many resources you have to invest. And that depends on how you handle the different tiers or styles of ABE. A given enterprise Account Executive may only be handle a few Tier 1 accounts, but a corporate rep could probably handle a few hundred Tier 3 target accounts at a time. **Put another way, the right number of accounts is the number that your team can handle in a tier-appropriate way.**

We know one company where management felt their reps could have 100 named accounts at a time – but they gave each one 150 accounts so the reps wouldn't feel like their territories were too small.

How Engagio does it
At Engagio, each Account Exec has a territory consisting of:

- 5 Tier 1 accounts (deep personalization, no generic marketing)

- 45 Tier 2 accounts (medium personalization, no generic marketing)

- 150 Tier 3 accounts (light personalization)

Our theory is that one rep can't handle the work to create deep profiles for more than 5 accounts; and they can't sign up to always follow-up personally (not via automated marketing) for more than 50 total accounts.

How many accounts should you target? (cont'd)

You can also look at it based on the capacity of your outbound Sales Development Reps (SDRs). According to TOPO, the ideal number of accounts per SDR is 88 at a time. (That is of course an average, the right actual number will vary by deal size and complexity.) The question is, how often can you contact a given account? Assuming every six months is the right frequency, then the right total number of accounts is 6 x 88 = 528… or about 500 accounts per outbound SDR.

But remember, there are big assumptions built into that calculation. In practice, the number of accounts in an ABE program and the number of SDRs per account varies quite a bit.

> *"A better guide to the best accounts-per-SDR ratio might be the number of people in the buying organization rather than pure deal size."*

Ken Krogue
President and Founder,
InsideSales.com

Engagio customer sample: accounts per account owner
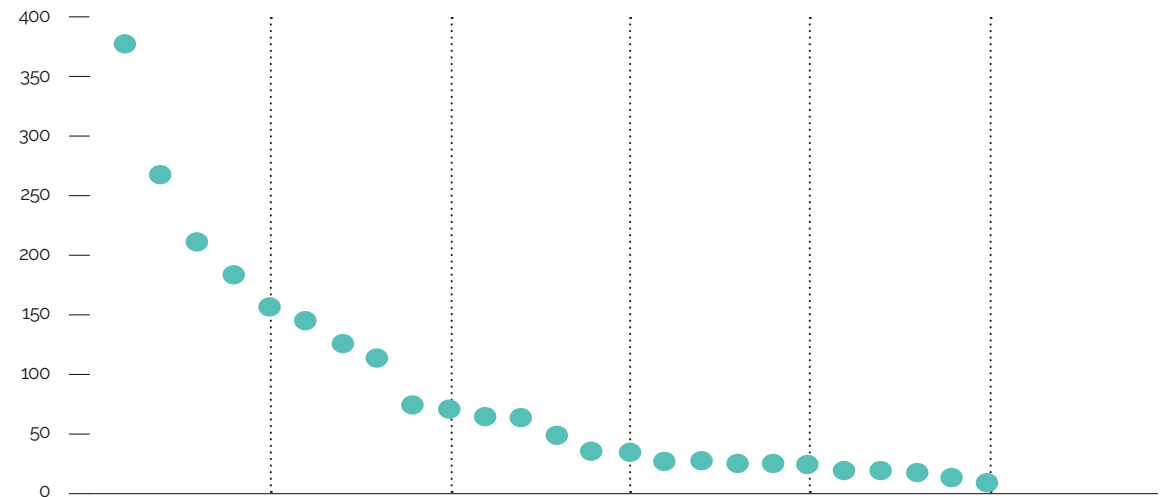
Across a sample of Engagio customers, the median number of accounts per account owner is 50. Quite a few Engagio customers have a lower number, 20 to 30 accounts per account owner, and quite a few have 100 or more accounts per owner.

> *"We've seen 200 accounts per rep and 10 accounts per rep."*

J.J. Kardwell
President & Co-founder
EverString

Mapping into buying centers

Large enterprises aren't cohesive, monolithic structures – they're made up of distinct operating business, many with separate divisions and locations. And, depending on your solution, each division may have multiple buying centers (for example, you might be able to sell to both the Sales department as well as the Service department).

Part of building your target account database is understanding these hierarchies and relationships, and mapping where you have existing relationships, where your competitors are, and where there is whitespace.

Updating your Account List

- Don't fall into the trap of constantly changing the accounts on your target account list: it can foster a habit of giving up too soon

- Sales development in enterprise accounts takes time – it can take years (but the pay off is worth the effort)

- 'Not interested right now' is a starting point not end of the road!

- Rule of thumb: don't turn over more than 25% of your account list each quarter

How Engagio handles account list management
At Engagio, a new rep can take a Tier 3 account from another rep if they're going to turn it into a Tier 1 or Tier 2 account.

Otherwise, they must keep their Tier 1 and Tier 2 accounts for at least a year, and can't swap out more than 25% of Tier 3 accounts each quarter. (Otherwise, it's easy to give up too quickly.)

We also keep a list of "On Deck" accounts that could be nominated into a target account if space opens up.

Ideal buyer profile

Once you've selected your target accounts, you need to identify the right people to approach within those accounts: the members of the buying team and its key influencers. Remember, you're not waiting for them to swim into your net, so you need to identify them in advance so you can design strategies to reach them.

The first step is to identify the *kinds* of people you'll want to reach: your Ideal Buyer Profiles (IBPs). This is most often led by marketing and will include not just job titles (which vary widely from company to company) but also job function, discipline, seniority and priorities.

The key is to discover and map the important roles inside every buying team. This list (from Wikipedia) is a good summary:

Initiator: the person who starts the decision-making process.

Decider: who makes the actual purchase decision.

Buyer: who selects the suppliers and manages the buying process.

Influencer: who contributes to the specifications and evaluation.

User: who actually uses the product or service.

Gatekeeper: who controls the flow of information in and out of the company.

After identifying the key buyer personas, marketing needs to build out profiles for each one: your IBPs. These are detailed portraits of the people in each role, including things like:

- **Demographics** – age, seniority, salary range…
- **Psychographics** – attitudes, beliefs and biases…
- **Job dynamics** – day-in-the-life insights, pain points…
- **Key challenges** – goals, strategies, pain points…
- **Background** – career route, past roles, skills…

For instance, it's not enough to know that you're targeting the CMO in your target accounts. You ideally need to know that you're reaching out to 'brand-conscious CMOs obsessed with customer experience but without deep experience in digital' as well as what kinds of messages and content they respond to.

Why do SDRs need IBPs?

The Ideal Buyer Profile helps SDRs in two important ways:

1. They guide contact building – leading the reps to the most important people in the target accounts

2. They help reps *understand* the person they're prospecting – to know what drives them, what makes them tick, what language will resonate, etc.

In short, crisp and clear IBPs are an essential element to any ABSD strategy.

Remember: Although your Ideal Buyer Profiles can tell you a lot about what messages will resonate with a given buyer, they don't completely replace your research on actual contacts (discussed below). A crafted message to a persona in a specific industry is a powerful thing on its own – but relationship-building should also reflect the things they learn about each individual contact (a recent blog post they wrote; a speech they gave, etc.), especially for Tier 1 accounts. As you go lower down your account tiers, the base profile plays a bigger role in shaping interactions.

Who does persona development?
The wider sales and marketing team should work together to develop personas, with marketing taking the lead on building out the profiles and stories.

Often, it's then left to the SDR to find the contacts that match those personas, though in some companies, marketing assists as well – especially for Tier 1 and Tier 2 accounts.

Top down or bottom up?

There's a lot of debate about whether an account penetration strategy should be top down (starting with the most senior executives) or bottom up (starting with actual product users or middle managers who need to get approval from above).

There are pros and cons to each: the top down approach tends to lead to bigger deals but at a slower deal velocity. Bottom up can progress quickly but can more easily hit road blocks or find themselves locked into a departmental solution rather than an enterprise-wide one.

One of the best things about Account Based Sales Development is that you can combine both strategies in one outbound program, reaching out to the most senior decision-makers with strategic messages while targeting the pain points of the more junior buyers.
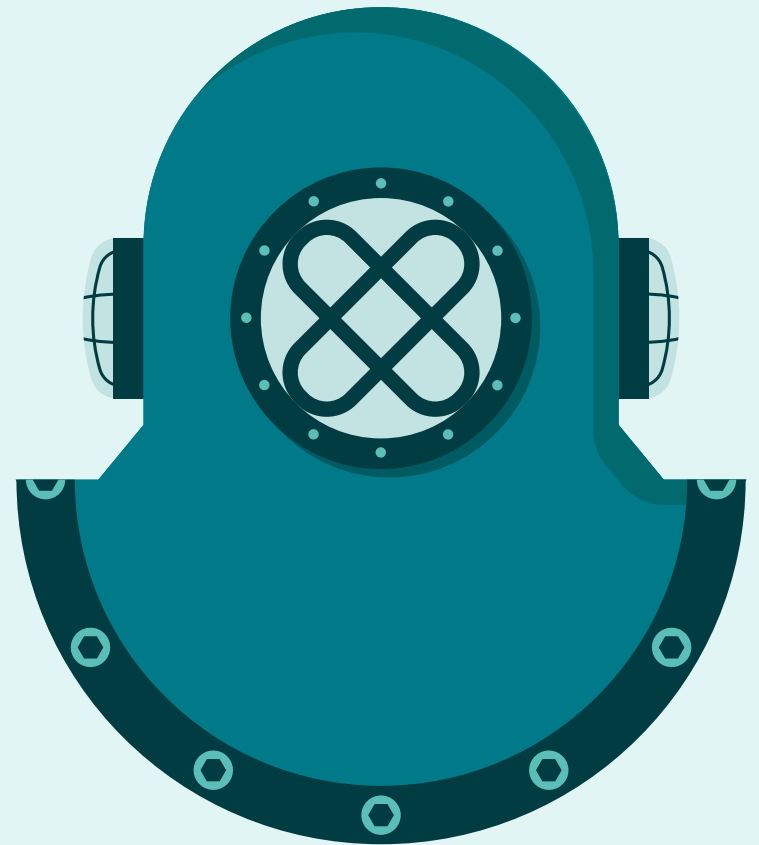
Multi-threading

In Account Based Everything, you'll need more than one or two personas in each target account – B2B buying is a team sport.

Deals that move forward on the basis of just one or two buyer contacts are the most likely to fail. Your contact can get sick, go on vacation or leave the company – stalling or killing your deal. That's far too high a risk for the deal sizes we're talking about. You need to build connections with as many members of the buying/influencing team as possible.

"For deals over a certain threshold, it is unacceptable to come to the table with only one person at the target company."

John Gilman
VP Worldwide Commercial Sales, NewRelic

Tip:

A lot of ABSD experts coach the 'Two Nos' rule: an account should never be marked 'no contact' until at least two of the key personas have said no.

"Targeting enterprises is trickier than the transactional model used for smaller companies. You need to navigate multiple buyers and roles."

Ken Krogue
President and Founder, InsideSales.com

The term 'multi-threading'
Comes from the world of computer programming. It refers to a program or operating system that can handle multiple user requests – or threads – at a time. A nice metaphor for the simultaneous relationship building in Account Based Everything.

Database build out

The success of your Account Based Everything program will depend on your ability to fill your database with contacts that match each buyer persona for each target account.

When you've mapped out the ideal personas, you can easily see which roles you've already got contacts for and where you still have coverage gaps.

To fill the coverage gaps, you need data. According to TOPO, you should acquire or append records until 100% of the target accounts and at l east 70-80% of buyer personas are represented in the database.

The good news: there are lots of tools and data sources that can help – from LinkedIn to vendors like NetProspex, Leadspace, ReachForce, InsideView, ZoomInfo and Datanyze (a very small sample – there are more in the Tools & Tech section below).

"If I could find the right person, I could usually have a productive business conversation with them. It was just a pain in the ass to find them, especially in the Fortune 500 size companies."

Aaron Ross
Predictable Revenue

"The single biggest time-killer is finding out who to contact. You don't want your expensive Account Execs doing that."

Ken Krogue
President and Founder,
InsideSales.com

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Data maintenance

If the world stood still, mapping your buying centers and filling coverage gaps would be a one-off exercise. In the real world, it's a continuous process.

Even if you start with perfect data and 100% account coverage, that data will decay at a rate of anywhere from 2-7% a month, depending on the role and industry. People leave companies, change positions, get promotions, etc. all the time. So you'll need an easy way for the team to continually update your data – plus a regular data hygiene check to see if you're still up to date. At Engagio, this is a quarterly process for all target accounts.
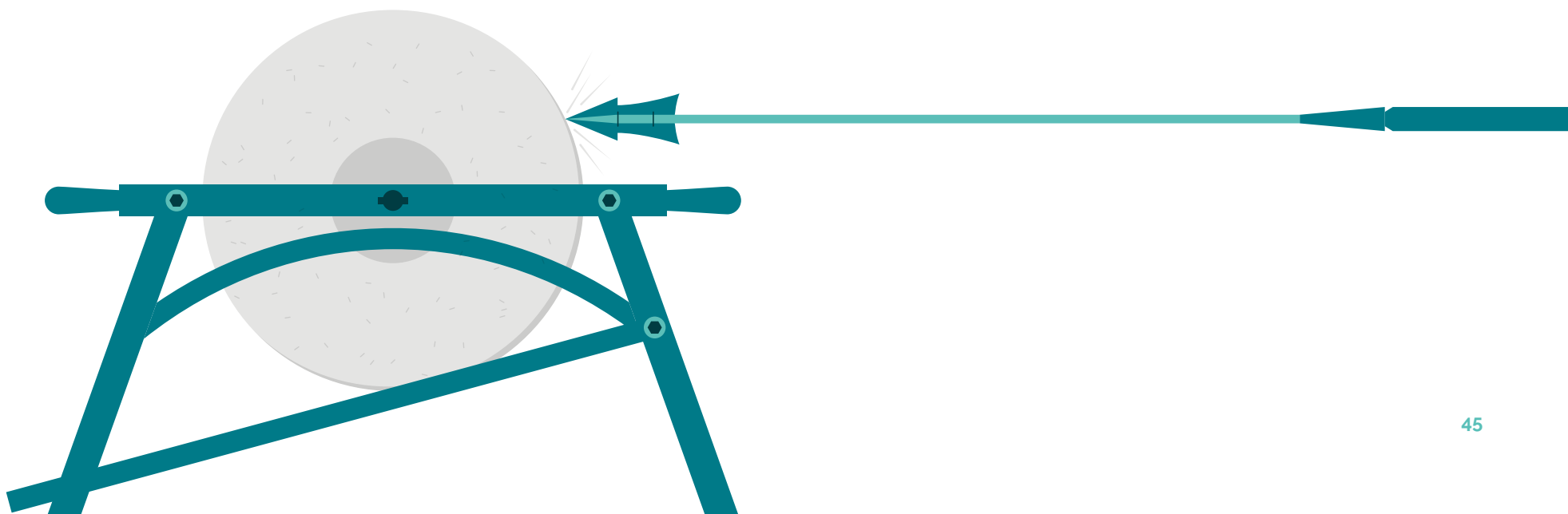
Part 8

The WHAT of Account Based Sales Development

The WHAT of Account Based Sales Development

Now that we know WHO we are going after, let's move on to the WHAT: the actions your SDRs will take as they work to penetrate target accounts.

The sales development Play

The most successful sales development teams leave very, very little to chance. Instead of letting individual reps decide who to call, they develop target account lists and map the buying teams inside them.

Similarly, the best sales development teams design the specific interactions that the reps will have, while leaving plenty of space for targeting and personalization.

Finally, the best SD teams are the ones that run the whole Play – the coordinated series of activities across all channels, targeting multiple buying personas.

A Play is a series of steps that orchestrates interactions across departments and channels to achieve a business purpose for one or more buying centers at target accounts.

The Play is a crucial concept in Account Based Sales Development. It's the recipe for the overall account penetration program and it should be designed up front, then improved over time.

The WHAT and WHERE sections that follow cover the elements that go into the sales development Play. But keep in mind that that's where this is all leading: a systematic program of activities aimed at turning a target account into a real opportunity.

"The idea is to design a surge of activity across all account stakeholders – and parlay that into richer engagement."

Tom Scearce
TOPO

"We find that senior executives are 2.5 times more responsive to quality multi-touch campaigns than are junior executives."

Dan McDade
President & CEO, PointClear

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WHAT:
harnessing the power of relevance

The success or failure of your Account Based Sales Development strategy depends on your ability to be relevant to your target contacts.

Relevance separates enlightened sales development from spam.

Relevance earns email opens and more importantly, responses.

Relevance gets buyers to lean forward instead of drawing back.

Your entire program is designed to deliver relevant messages to the right people at the right time. **And relevance can only come from insight: a real understanding of the buyer's challenges, opportunities and pain points.**

If you cut corners here, you risk damaging your relationships with the most important people at your most important accounts. It's just too easy for them to hit the spam button and block you from ever reaching them again. To *deserve* the attention of your target accounts, you need to *earn* it. And that's where research comes in.
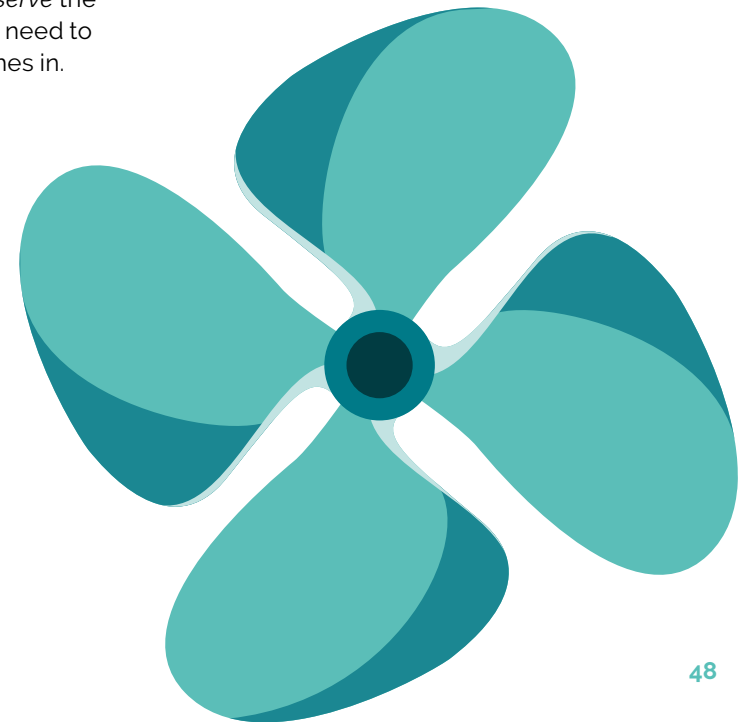
Sales spam is embarrassing

We've all come to accept a certain amount of marketing spam (though we still hate it). But 'sales spam' is far worse. Sales spam pretends to be personal and relevant while being exactly the opposite.

Emails with badly automated personalization make you look stupid.
One of our favorites started with "Hi, Mr. Jr!" to a friend whose name was Bill Smith Jr. Another called Jon Miller 'Steve' in the salutation. Nice.

Approaches that focus on the salesperson's needs are a turn-off.
"I've been trying all week to get you" is your problem not theirs.

Generic, templated emails are crass.
They pretend to be personal but betray the opposite.

Blind templates are dangerous.
Maria Pergolino tells of a sales rep she heard about who kept not-so-nice personal notes about the buyer in Notes field in their CRM. Result: an email that arrived with the unflattering comments included!

These kinds of tactics are bad enough for small deals. For the big opportunities, you've got to raise your game. It's so easy to hit the spam button – **why would you ever risk your ability to communicate with the most important people from the most important accounts by sending them a generic, irrelevant message?**

"Template emails are roulette wheels. If you only get 100 rolls of the roulette wheel, then you need to increase your odds."

Craig Rosenberg
Co-founder and Chief Analyst, TOPO

The old way	The ABSD way
1. Hire lots of SDRs	**1.** Identify specific accounts
2. Buy lists of leads cold call	**2.** Engage those accounts with compelling commercial insight
"Always be closing"	"Trusted advisor"
Secret weapon: Managing high-volume operations	**Secret weapon:** Better data, more research
Quantity	Quality

Cold calling has gone cold

A recent Baylor University Keller Center Research Report found that for every 330 cold calls made, only one appointment was set (a 330:1 call-to-appointment ratio).

And LinkedIn reports that 90 percent of B2B decision-makers never respond to any form of cold outreach. Ouch.

The problem is not with the 'calling' the problem is with the 'cold'. Do your homework or get the cold shoulder!

Mike Volpe's Prospecting Armageddon

Mike Volpe, one of our favorite start-up growth advisors, describes what he calls 'Prospecting Armageddon': a cycle of failure that traps any sales development team that skips the 'relevance' mandate. It looks like this:

The Prosepecting Armageddon

BDRs send cold emails

People filter and ignore (even more)

BDR miss goals b/c low response

BDRs use tools to send even more cold emails

mikevolpe.com
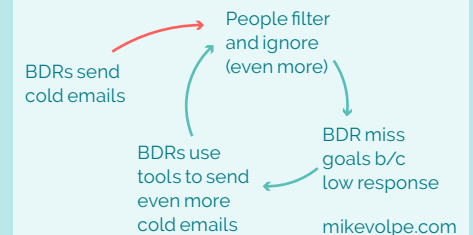
Getting your Who/What/Where framework right will keep you out of this cycle of despair!

What relevant outreach looks like

There's no mystery to the kinds of things that make people lower their Sales Defense Barriers and listen to your SDRs:

• Helpful advice about best practices
• New insight into pressing issues
• A look at how similar companies attack the same problems
• Reliable data that throws new light on a challenge
• Expert views on trends and futures

These are the same things that made content marketing replace old-school, broadcast-style, interruption-based advertising. And they work just as well in a sales context.

"75% of executives will read unsolicited marketing materials that contain ideas that might be relevant to their business."

ITSMA

What does "relevant to my business" mean?
The three most important factors in an enterprise decision:

• **Knowledge and understanding of my unique business issues**
• **Knowledge and understanding of my industry**
• **Fresh ideas to advance my business**

Source: ITSMA

In other words, the best prospecting messages prompt Challenger Sale-style conversations.

Sales reps are 5x more likely to get engagement if they add value to prospects, but just 20% of sales people are currently seen as valuable by their buyers.

Salesforce blog

74% of buyers choose the sales rep that's first to add value and insight.

Corporate Visions

The Challenger Sale: commercial insight – not 'thought leadership'

Account Based Sale Development is the ideal enabler of The Challenger Sale, a breakthrough concept summarized in the excellent CEB book with the same name.

The book shows how the best sales reps are those who are comfortable as **Teachers and Tailors**. Teachers offer unique perspectives to their prospects and are great at two-way communication. Tailors understand the prospect's value drivers and can craft messages to their economic motivators.

This approach is far more specific and tailored than generic 'thought leadership'. In fact, it's something far more valuable: **customized commercial insight**.

The best sales development teams are the ones who best deploy this kind of commercial insight. Specifically, they:

Demonstrate an understanding of the prospect's world.
They don't just claim an understanding, they *prove* it and back it up with evidence.

Disrupt the prospect's world view.
They break the frame of reference to expose a flawed assumption, challenging the status quo.

There's a lot of noise for SDRs to cut through, but if they succeed then they get to the real commercial insight that can make a prospect lean forward.

"Educate without pitching."

Ken Krogue
President and Founder,
InsideSales.com

General information
Be credible/relevant

Accepted information
Be newsworthy

Thought leadership
Be frame-breaking

Insight
Lead to supplier

Commercial insight
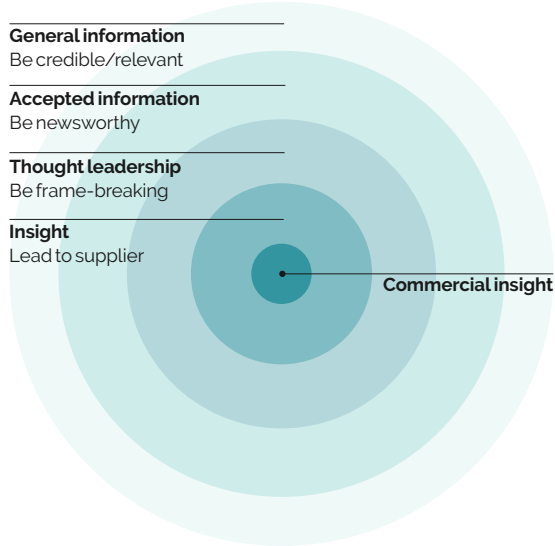
Source: CEB

WHAT: building your account insight using research

Part 8
The WHAT
of Account Based
Sales Development

Valuable, relevant commercial insight comes from research. The depth of research will reflect which tier a given account is in.

Tier 1: Deep research
Each account is treated as a "market of one", with intensive research and account plans and full buying center mapping. These insights ensure that each interaction is completely customized and personalized for that account (and ideally the person).

Tier 2: Medium-depth research
A lighter level of research but the goal is still that each interaction is personalized or customized (remove these accounts from generic marketing emails to ensure each touch is personalized, reviewed, and approved by a human).

Tier 3: Light research
Teach reps to discover '3 things in 3 minutes': a fact or insight on the Industry; on the Company; and on the Persona or individual contact. Very light customization on some channels (e.g. sales email); other channels get segment- and/or persona-specific messages (e.g. in online advertising).

"The sales development role is the lynchpin of Account Based Everything. ABE is driven by insight, research and feedback - and who has more real-time access than the SDR?"

Tom Scearce
TOPO
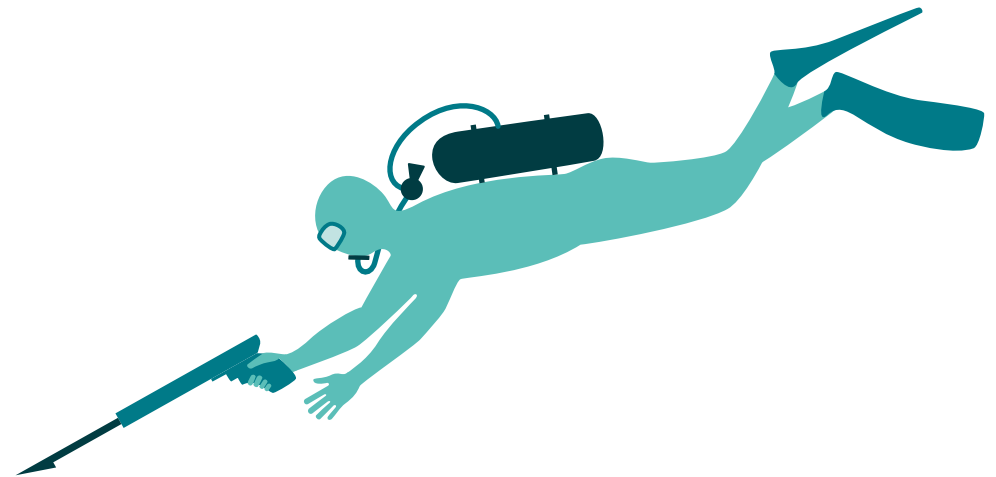
What you're researching

For a Tier 1 account (with the most intensive research), research will almost always include:

Market dynamics
Size, growth, maturity, disruption, competitors…

Company
Revenue, profitability, growth, market share, stock performance, outlook, acquisitions, history…

People
Leadership, buying teams, stability, culture, values, tenures in key roles, attitudes, preferences, biases…

Relationships
Organizational structure, reporting, power centers, buying teams…

Strategy
Business model, priorities, strategic initiatives, successes, failures, whitespaces…

Connections
Any links from your company into theirs: past employment, association memberships…

History
Complete view of your prior interactions with the account (emails, meetings, deals)…

Technology
Competitive solutions, complementary solutions, collaborative solutions, etc.

Door openers
University ties, home towns, sports teams, interests, conference attendance…

The account insight profile must be a living document, regularly updated with new information. The entire team should be alerted to important updates to any of the above categories.

Again, the research intensity will depend on the account tier. Research is time-intensive, so instill a discipline about getting a return on that investment.

Who does the research

Who has responsibility for account research - the SDR? The Account Exec? Marketing?

The answer varies by company – and may also vary by account tier. We like this simple structure (but we've seen many others work too):

Tier 1 – AEs are responsible for creating and maintaining the account plan (with quarterly updates), but Marketing plays a BIG role in helping and supporting.

Tier 2 – SDRs and Marketing coordinate on the profile. This will often be led by the SDR team, unless company has a dedicated Account Based Marketing function.

Tier 3 – SDRs are the primary owners of the research, with help from Marketing and various tools. Possibly with a specialized research role that does nothing but account profile building (an example of even greater specialization in the SDR function).

Whichever approach you choose, someone has to own the research function and be accountable for it. **So much depends on this insight**.
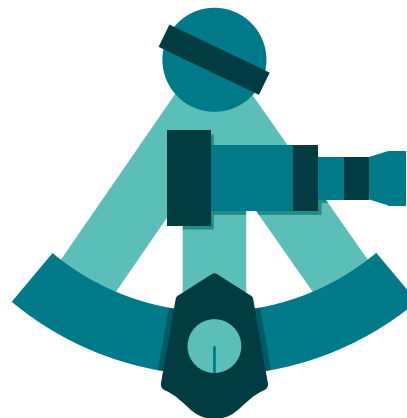
Sources of insight
Where do your researchers get their information? A few sources:

- The company website
- Annual reports
- SEC filings
- Analyst reports
- Press releases
- Blog posts
- Investor relations
- Industry media
- Financial press
- Influencers and bloggers
- LinkedIn
- Speeches and conferences
- Product and technical literature

In general, researchers are resourceful people who quickly become black-belts in Google.

The role of data in profile-building

Not all the insight in an account profile has to be hand-assembled. In fact, most companies use some form of sales intelligence solution, integrating new data sources to accelerate the process and add detail.

There are also dozens of useful tools to help with this, including but not limited to Mattermark, Owler, InsideView, DiscoverOrg, Compile, RainKing, DataFox, Avention, and Hoovers. (See Technology and Tools section on Page 127 for more.)

Marketing interactions are another important source of account data: knowing what web pages, emails and content the account has interacted with will help steer your team towards new opportunities and better conversations. Integrating your marketing automation with your CRM system makes it easy to pull this kind of data into your profiles.

Trigger events

Some of the insight in your account profiles will be fairly static or slow-changing. Other items will be timely – and many of these might be 'trigger events' that indicate a window of opportunity is opening up.

Only you and your team will understand the key trigger events that matter most to your company, but these are the kinds of triggers we've seen:

- Funding round
- Acquisition
- New office opening
- New executive hire
- Award win
- New business win
- Industry recognition
- Promotion

The important thing is to spot the trigger events early and alert the SDR that it's time to reach out ("Hey Laura, congrats on the big win...").

"The goal of sales development is to peel the market layers back and find customers that represent the best business fit for the company and engage them in a dialogue."

Robby Allen
Director of Sales Development,
Zenefits

Profiling by persona
It's not enough to simply craft messages to each account. You also have to craft them for each persona. Your Ideal Buyer Profiles should drive this, but here are some additional examples that add a layer of insight according to role:

CXOs
- Looking of the "next big thing"
- High-level P&L
- Travel a LOT
- Work weekends and evenings

- Use phone/tablet

VPs and Directors
- Oversee large teams
- Improve team performance
- Efficiency, scalability, output
- Solution focused
- Use phone/tablet

Managers
- Hands on, in the weeds
- Project focused
- Potential power user
- Buy-in still important

Q&A

Scott Gaydos, Demand Generation Lead, Guru

What are the most important metrics to track in an ABSD team?

At Guru two of the most important are coverage and engagement – at the account and the contact level. We target sales leaders, enablement leaders, and customer support and success leaders. So our process starts with knowing who these people are and ensuring they live in our CRM.

We aim to understand who the key players at our target accounts are, and what level of exposure they have had to Guru. Have they downloaded our content, had a conversation with an SDR, clicked on an ad, created a free Guru account, and so on?

Then we try to set up a next step that progresses the relationship. When there are higher levels of engagement with an account, we see the change and we evolve our communications with our contacts there.

What kind of impacts have you seen in moving to outbound ABSD?

By homing in on our ICP (ideal customer profile) we have seen a significant increase in our average deal size and our win rate.

Over the past few months we've seen our win rate jump to just under 60 percent, while our average deal size has more than doubled (and it's still growing).

Having the discipline to focus everything from sales outreach to content strategy, social campaigns, online ads, events and partnerships is a huge part of why we have been successful. We do not just chase revenue everywhere.

We focus on the areas where we know we will have the best results for our customers. This is also proven by our high adoption rates and low churn rates.

Do you use template emails or crafted, personalized emails?

Our first email is always personalized. Our follow up emails have a templated flow, but have elements that are personalized.

We have several triggers we use to identify companies that, from our experience, are most willing to engage in a conversation:

- Raised funding – most likely to be used to grow sales and marketing
- Recent change in sales or sales enablement leadership – looking to make changes to improve sales effectiveness
- Hiring more than four sales reps – will need to scale their team quickly

With these triggers in mind, we create content geared at helping to solve associated pain points – and train our sales reps on how and when to share it.

The result is a play that is filled with valuable information for our prospects as they experience these triggers and transitions. We try to add value with each interaction, and that is seldom achieved with templated emails alone.

The WHERE of Account Based Sales Development

The WHERE of Account Based Sales Development

That's the WHAT of Account Based Sales Development: the insights and messages that will guide your SDRs as they personalize their engagements with prospects. Now let's move on to the WHERE: the channels and touchpoints that your SDRs will use to deliver those messages.

Your SDRs are primed with relevant insights to share with their target accounts. Now it's time to reach out.

In traditional prospecting, reaching out meant hitting the phones. Later, it meant firing off dozens or hundreds of emails.

In today's Account Based Sales Development, prospecting is always multi-channel. Each channel has its own strengths and weaknesses, but something akin to magic happens when you combine them into a coordinated program.

If you take nothing else away from this section, take this: a mix of channels will always out-perform any single channel.

Some of the channels used in Account Based Everything fall into the marketing domain – and it's important to include these in your thinking. We'll talk about those later. This section will highlight the channels that are used by the sales development reps.

"Avoid over-dependence on a single technique. Prospectors should be experts in two to four complementary techniques and know the pros and cons of each."

Aaron Ross & Jason Lemkin
From Impossible To Inevitable

It's all about 'you', not 'me'.
No matter which channel the SDR uses to engage with prospects, messages must all be crafted around the recipient and their needs.

This sounds almost too obvious to mention but it's amazing how many emails or voicemails we all receive that start with the sender's company and their needs. If your messages don't answer the 'Why should I care?' question – and do it first, they will fail.

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The big three

There are many ways to reach out to target contacts. But the ABSD discipline is built on the big three:

1. **Human email** – as opposed to automated templates or marketing automation campaigns
2. **The phone** – including voice mail and live calls
3. **Social media** – and industry community sites

Your ABSD Plays will largely be built on touches across these three channels. Let's take them one at a time…

"Voicemail and email are equally important. And together, they're twice as effective as all other touches combined."

Trish Bertuzzi
The Sales Development Playbook

! Pick the channels they like most

What's the best channel for reaching out to a prospect? The channel they like best. The "perfect" prospecting email sent to someone who gets a thousand emails a day may be less effective than a 'good enough' direct message sent to someone who likes to communicate over Twitter. Find out!

Mix it up!
We're focusing on the three main sales development channels here, but remember, there are many more ways to reach out. Think about using any or all of these formats and channels to reach your prospects:

• Text messages
• Memes
• Gifs
• Personal video
• Snapchat
• Pinterest
• Instagram
• Google+
• Personal podcast
• WhatsApp
• SlideShare
• Google Hangout
• Periscope
• Use your imagination…

1. Human email

Personal email – sent from an SDR to a prospect – is the workhorse of ABSD. Done properly, these emails feel much more like personal business communications than marketing or selling (because that's exactly what they are).

Human emails are:

- Plain text, not HTML

- Short and to the point: make each sentence as short as a tweet

- Always relevant and on-message

- Personalized, reviewed, and approved by a human – not automated

- One-to-one or one-to-few (it's okay to cc people if they're the same persona)

- Team-worthy: don't send the exact same email to four team members, but you can send one relevant email to the entire team

How much should you template?

Human email doesn't mean that every email must be hand crafted from start to finish. That wouldn't be scalable across all account tiers.

Rule of thumb: the more important the account or the contact, the more you want to personalize and the less you want to use a template. Well-targeted, personalized emails will always out-perform templates.

The degree of personalization will vary by account tier:

Tier 1: Highly personalized, with little or no templating

Tier 2: Personalized, perhaps using the 10/80/10 approach

Tier 3: Customized rather than personalized (e.g. targeted to their industry and persona, uses their name and company name)

The goal is to make sure the prospect feels the email really is written to him or her, as an individual. That's not a trick, it's the truth (if not, you're doing it wrong). To do that you must show that you've been thinking about them.

"Dear <insert SDR Name>: Please avoid sending me emails that are obviously automated."

Ray Carroll
VP Sales,
Engagio

The 10/80/10 approach
Some SDR teams apply a 10/80/10 rule to their human emails: Customize the first 10%; Use the template for the next 80% (with possible personal tweaks); Customize the last 10%

Human email (cont'd)

The subject line

Subject lines are the gateway of email prospecting. Fail here and the best-crafted email in the world will never get read. Some tips:

Start with 'you' or 'your'
People care more about themselves than about you.

Examples:
Subject: You may have started something
Subject: Why your boss is so grumpy these days

Be intriguing
A subject line is a teaser. Make them *want* to open it up.

Examples:
Subject: You kind of asked for this
Subject: Your CRM seems to be leaking
Subject: How [competitor A] is cutting waste

"Only 23.9% of emails are opened."

TOPO

Be personal
The one-to-one starts here.

Examples:
S*ubject: Why your recent blog post hit me so hard*
Subject: Your recent talk at Dreamforce
Subject: [Dan Brown] says we should speak

Try starting with a benefit
What's in it for them?

Examples:
Subject: I can save Sanstreet $35k
Subject: A more agile IT approach for WidgetCo

Avoid marketing speak
We all get way too much of it.

Bad Examples:
Subject: Your free security audit!
Subject: This will change your life

What these all have in common is they are focused on helping the recipient, not on helping the prospector. Ideally, use the strategy that will result in the most relevant email.

Some subject line inspiration
There are some great lists of sample subject lines out there, check out ones from PipeTop and Hubspot. Google them up for some inspiration.

Human email (cont'd)

The opening

**So you earned the open. Nice one. Now you've got maybe 7 seconds
to capture their full attention. A few tips:**

Start with them
Don't waste the vital first few seconds.

Examples:
*As a Hadoop user, I'll bet ten bucks you've
discovered the 'alt-45' error message.
Don't you hate that?*

*Your recent post on drone warfare made
me laugh out loud. Twice.*

Be personal (again)
It's a personal note, remember?

Examples:
*I was reading an article by Bob Apollo
and I thought of you.*

As a Cornellian, I knew you'd like this one.

[Mutual connection] suggested I get in touch.

Don't apologize
Never start with an apology – this matters!

Bad Examples:
Sorry to take your precious time but…

I apologize if this isn't relevant to you but…

Don't start with an introduction
You can do that later.

Bad examples:
*My name is Bob Roberts and I work for Sourghum
Dynamics, a leading blah blah blah…*

*Let me introduce myself. I'm a… [never mind,
they're gone]*

*"You're sorely mistaken
if you believe that flooding
an executive's inbox with
rote solicitations will escape
the DELETE key."*

Ari Kaufman
CEO, Placeable

Human email (cont'd)

The body

Right after your killer opening, you need to do two things: prove that you did your homework and show them why they should stay with you.

· ·

Use your insight
Now's the time. Roll out the research.

Examples:
Congrats on your acquisition of Global Felt! I think I can accelerate your IT integration by about six months, but I won't know for sure until we've spoken.

As your CEO said in yesterday's investor call, "It's time to go all in on Blockchain." The problem is, your Microsoft legacy stack is going to hold you back.

Be excited
People want to work with people who love what they do.

Examples:
To be honest, the article blew me away – and I wanted to get to you right away. Here's why:

I can't wait to show you our new benchmark research – it totally changed the way I think about managed print services and I know it'll do the same for you.

Don't brag
No one likes a braggart.

Bad Examples:
We're the Number 1 supplier of lard to the defense industries and we've won every Lardie Award since 1983.

Don't take my word for it: CustomerCo says we're the 'best lobby carpet solution provider in Southeast Nebraska'.

Human email (cont'd)

The call-to-action

Every email needs to ask the prospect to do something.

Make it clear
This is no time to be coy.

Examples:
*Is there a way to get 15 minutes
on your calendar?*

*Come and get the report here
– there's no form to fill out.*

Don't ask for too much
It's a big jump from an email to a marriage.

Bad Examples:
*Try our nuclear power plant for a year
and if you don't like it, we'll take it back.*

Call me to discuss your next office move.

Guidelines instead of templates
Some SDR teams use email
guidelines rather than templates.
An example (from MJ Hoffman's
Basho training focused on answering
"Why You, and Why You Now"):

- The subject line includes the
  word "you"
- The first paragraph shares a piece
  of relevant news
- The second paragraph is the
  "So what?" – why they should take
  your call
- End with a CTA: such as a request
  for a meeting

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Human email (cont'd)

Some example emails

From: doug@velocitypartners.com
To: jon@engagio.com

Subject: Ray said you're ramping up fast

Hi Jon

Congratulations on the launch of PlayMaker: very cool software!

Knowing how you worked at Marketo, I'm guessing you'll be ramping up your sales team right about now.

I think I can help. We placed 180 top-notch reps into SaaS companies in the last three months and I've got some talented folks who would kill to work at Engagio.

How can I get ten minutes on the phone with you to show you our way of working (it's a world away from the typical head-hunters!)?

Ready when you are,

DK

Notes:

- Mentions a mutual friend in the subject line

- Starts with enthusiasm and proof of homework

- Signals willingness to help

- A single proof point

- A personal tweak '… would kill to work for Engagio.'

- A clear CTA

Human email (cont'd)

Some example emails

From: doug@velocitypartners.com
To: jon@engagio.com

Subject: Loved the ABSD Guide
Hi Jon

Hi Jon

I LOVED the Clear & Concise Guide to ABSD.

You convinced me about predictive analytics – now I want to convince you of something: analytics plus data cleansing is a killer combination that doubles the value of your models.

I do a 3-minute demo that blows people's socks off. It shows how we solved the single biggest problem facing data-driven geeks like you and me.

How's Tuesday at 10am for a call?

If not, suggest a slot or two and I'll book it.

DK

Notes:

- Flattery works! (But make it true)

- Tie your solution to their world

- Have a bit of fun

- Be conversational

Human email (cont'd)

Some example emails

From: doug@velocitypartners.com
To: jon@engagio.com

Subject: San Mateo is ground zero for ABE

Hi Jon

I traced back the aftershocks of the Account Based Everything revolution and they led straight to your office.

The missing piece, I'm convinced, is pastrami.

Hot pastrami delivered to your office every Friday at lunchtime.

The [ABE] revolution needs fuel. But we need you at your desk.

Stay in. Eat.

I'll even throw in a Dr Brown's Creme Soda for a buck more.

Click here and your order is pretty much done.

DK

Notes:

· Way more templated than it looks

· Funny and straight to the point

· Asks for the order

!   **Tip: Craft your signature**

A short, professional email signature paired with a good photo can increase the response rates to your emails. People remember photos better than text – and they remember people photos most of all.

Stan Woods
Managing Director, Velocity Partners Ltd
0208 940 4099, velocitypartners.com

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Human email (cont'd)

The "Lost Lamb" approach

Aaron Ross, co-author of *Predictable Revenue*, developed a specific type of prospecting email in his time at Salesforce. Instead of a traditional sales email or call, he simply asks senior executives for help in finding the right person to talk to, then uses the introduction as a door opener. **His example:**

Subject: Can you point me in the right direction?
[firstname], I'm sorry to trouble you. Would you be so kind as to tell me who is responsible for [insert your biggest pain point here that resonates with your ideal customer; OR insert function like "sales" or "recruiting"] and how I might get in touch with them? Thank you, Name/Signature

Other examples of this approach include emails that have the subject line "Question" or a cryptic "XXX". Our view is that while this 'teasing' approach can work, it should probably be reserved for Tier 3 accounts and you should use more relevant messages for Tiers 1 and 2 (where you should know the right person already!).

Human email (cont'd)

Follow-up emails

When the first email doesn't get a response you need some good follow-ups.

If the first email wasn't opened at all, you might try re-sending it with a new subject line. The prospect won't know it's a repeat and the new subject line may do the trick.

If that's not an option, you need a well-crafted follow up (most likely a series of follow-ups).

Follow-up tips

Try a different angle – the first one didn't resonate, so pick a new issue or entry point. If you tried a pain point, start with a case study this time. Have the email come from a different person in your organization. Change the tone. Mix it up.

No guilt trips – don't try to shame the prospect into replying. Just get to the point (a new point).

Referring back can work – a quick reference to past attempts is fine (without the guilt). "Just bumping this to the top of your inbox…" is a way to recognize that the prospect is busy without harassing. "I've tried you three times…" is just annoying and highlights your failures.

Use your research – refer to a recent blog post or relevant news item. Make it timely and connect it to the prospect directly.

Always offer value – emails that say "just following up" or "just checking in" are annoying and offer no benefit to the recipient.

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Human email (cont'd)

Follow-up emails

Try RE: – If you have started any thread with the prospect, use it to create an RE: subject line (a ContactMonkey study shows they get opened far more often). Some even delete the original subject and simply leave "RE:" as the subject line. But tread lightly: a faked "RE:" is not a great signal.

In fact, follow-up emails should be guided by the same principles as first emails. But you now have some data to work with: what didn't work for this prospect! **An example:**

Notes:

- Refer back but don't overdo it

- A short, sweet case study with money attached

- Ask for the demo

Subject: RE: A new angle on your conversion challenges

Hi Jon

My last email used a killer statistic to drive home the importance of conversion rate optimization. This time, I want to tell a story:

ShowerRign.com, our third client ever, used our services to re-design their home page and CTA. Within three weeks, their conversion rate jumped 75% and never came back down.

By their own calculations, that one decision made them $650,000 in three years (and is still earning more).

More than half a million in revenue from a $75/month service…

Sound like it's worth a 17-minute demo?

DK

Human email (cont'd)

Last ditch emails

When nothing has worked over many attempts, you've got little to lose. It's time for a Hail Mary pass to try one last time to shake the prospect into action.

The key to last ditch emails is to have fun with your desperation – but never make it their fault. **An example:**

Subject: My Aunt Ethel said to try you one more time

Hi Jon

My Aunt Ethel was a remarkable woman. Six sons. Two husbands. Three hip operations. Kind of a hero.

And there was one thing Aunt Ethel drilled into me over and over again as I was growing up: "Determination beats genius 99 times out of 100."

That's great news because I'm no genius. But I AM 100% determined to have a five-minute chat with you about your lead scoring.

Humor me. Prove Aunt Ethel was right. All it takes is one click.

DK

Notes:

- A bit of self-effacing humor

- Show that determination is a character trait

- Bring in something personal
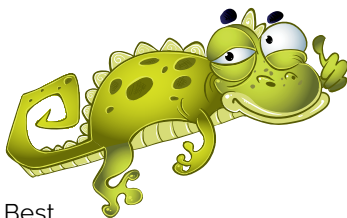
Human email (cont'd)

Last ditch emails

Subject: Y'all get eaten by an alligator?

Hey Doug -

When someone seems really interested in Engagio, then goes silent, I can only assume:

- You've just been swamped, or
- Went in another direction, or
- Were eaten by an alligator.

If you're alive and well, please let me know how to move forward – or I'll be forced to get even better clip art...

Best,

Jon

Notes:

- Again: have fun with it

- Images can help: Puppies? Kittens?

- Don't promise it's the last attempt (it might not be!)

The four options email
An effective way to make that last ditch attempt is to give the prospect four options and them respond with a simple number:

1. Yes, I want to schedule a demo – let's find time

2. Let's touch base in two weeks

3. I'm interested, but not for a few months

4. Please stop bothering me!

2. Phone and voicemail

Outbound calling is an extremely important part of any ABSD strategy – including both live calls (rare but valuable) and voicemails (the unsung super-tactic).

Actually achieving a live call is a big win – but don't hold your breath. TOPO estimates that it takes 18 dials to actually connect with a buyer. (Most SDRs give up long before that – a big mistake).

The live call
If you do actually connect with a buyer, be prepared. SDRs should have a call guide that helps them get straight to the point and avoid the waffling that tends to characterize un-rehearsed calls.

Unlike voicemail or email, voice calls are two-way communications that allow the SDR to ask questions and listen hard for the answers. But this skill doesn't always come easily to less experienced SDRs. Training and coaching (covered in the next section) are keys to building skills in the back and forth of the live sales development call.

Tips
- Start strong – just as with emails, the opening is important. Don't waste it with slow introductions. Dive in.

"Hi Doug, I read your post on AI yesterday and wanted to reach out. I've got some data that I think is right in your sweet spot and wanted to send it over..."

- Get to value fast – the 'What's in it for me?' question is burning in the prospect's mind. Answer it as quickly as you can.

"My head of research has just finished a benchmark report that shows some interesting things about your competitors."

- Be brief – a short call can be more successful than a long one – if you get what you came for.

"...just making sure you got the new book we sent you."

- Once you've established permission, ask open but pointed questions – get the prospect to talk about his or her challenges.

"Can you tell me how you guys solve this today?"

- Ask for the next step – know what you called for and ask for it clearly and directly.

"Can I set up a quick call with our CTO in the next week?"

Too often, the SDR will jettison the carefully planned relationship-building program and, in a rush of adrenaline, try to turn into a closer. That's a shame, because a helpful, high-value call with an SDR who really listens is a compelling experience that can significantly accelerate an opportunity.

Phone and voicemail (cont'd)

Voicemail

Because very few people return voicemail messages from SDRs (from 0-1% ever do), too many think of them as failed attempts to make contact. Nothing is further from the truth: a well-planned voicemail is a valuable touchpoint and a key part of every Play.

Not only do you get to deliver a message with added voice and a personal touch; you've also put a marker down and made another impression. Research shows that a voicemail message increases the likelihood of getting a response to a later email: all of a sudden, there's a person behind those messages.

The double touch
Some experts say the instant voicemail/email combination – known as the 'double touch' or 'double tap' –can significantly increase email response rates. Others have found it less effective. Do your own testing with your prospect base.

Don't expect a callback.
For voicemail messages, leaving your phone number twice (at the beginning and end) is a dying practice.

In fact, don't even ask for a callback – ask the prospect to review your note so you can set up a meeting. Most people (especially introverts) are just not going to call back someone they don't know. So make it easy for them.

"Hi, this is Mike calling from Green Leads. There's no reason to return this phone call, but if you could reply to the email I sent yesterday— I'll send it again — I'd really appreciate it..."
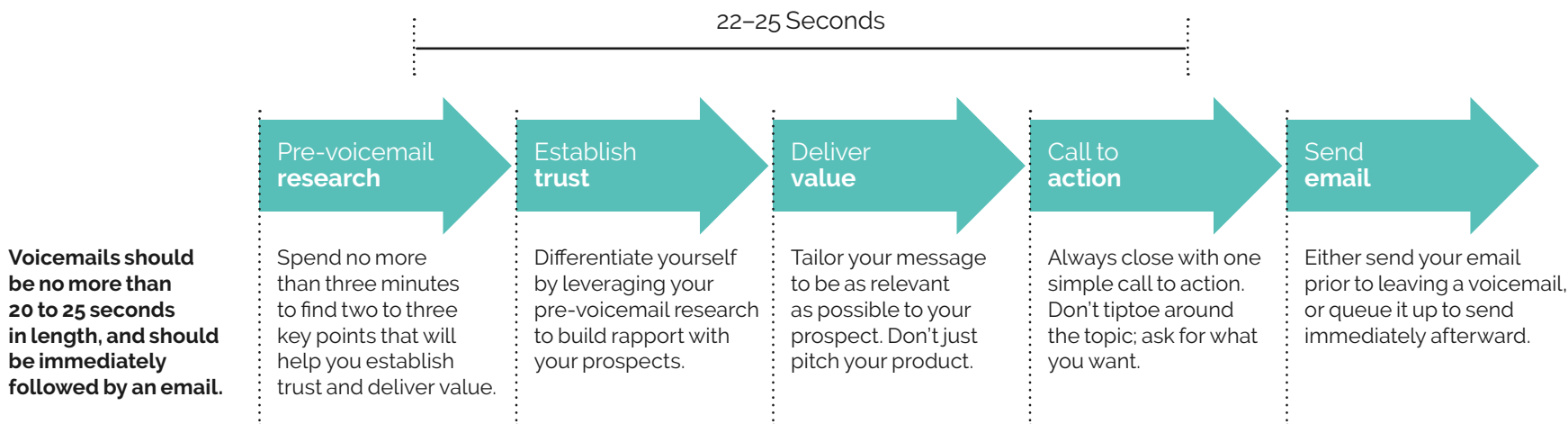
Recognize everyone's natural resistance to being sold to – and soften it.

The TOPO voicemail framework

The voicemail framework provides a step-by-step process for creating and delivering impactful voicemails. This research note will explore each element of the framework in more depth.

The top 20 performers in TOPO's Sales Development Benchmark Report leave 29.5 voicemails a day and an average of 3.8 voicemails over 17.6 days per prospect.

22–25 Seconds

Voicemails should be no more than 20 to 25 seconds in length, and should be immediately followed by an email.

Pre-voicemail **research**	Establish **trust**	Deliver **value**	Call to **action**	Send **email**
Spend no more than three minutes to find two to three key points that will help you establish trust and deliver value.	Differentiate yourself by leveraging your pre-voicemail research to build rapport with your prospects.	Tailor your message to be as relevant as possible to your prospect. Don't just pitch your product.	Always close with one simple call to action. Don't tiptoe around the topic; ask for what you want.	Either send your email prior to leaving a voicemail, or queue it up to send immediately afterward.

Phone and voicemail (cont'd)

Trish Bertuzzi's 4 rules of voicemail

Trish Bertuzzi recommends short voicemails – under 40 seconds. These are her four rules from the terrific Sales Development Playbook (examples ours).

1) Be different and be relevant
Don't just 'touch base'. State the reason for the call and share relevant, useful information.

"I saw you speak at WAPworld yesterday. Great talk. You referenced some data about SMS and I wanted to make sure you got a copy of our latest report…"

2) Be specific with the ask
Ask for a reply to your email… just make it clear what you want them to do.

"If you can respond to my email before Thursday I can be sure to get you a place at the roundtable in town next week."

3) Don't reference previous attempts
These highlight failure and don't add up to a relevant reason to call.

"I left two messages and sent an email last week. Just making sure you got them." [Guilt trip]

4) Don't trick prospects
Never pretend to be an acquaintance or bullshit in any way. There's no trust without integrity.

"Hey Dan, Bob. Give a call when you get a mo: 555 777 5555. Thanks, Bud." [Yuk]

Bottom line: never let your SDRs think of voicemail as a failed attempt to make a connection. A confident, upbeat, clear and compelling voicemail is a high-quality connection.

Friendly ghosting
'Ghosting' is calling a prospect but not leaving a voicemail message if you don't connect live. It's a low-value touch but sometimes a valuable one in a wider, multi-touch Play. Some SD leaders design ghosting into their Plays.

3. Social media

The third leg of the SDR stool is social media. That includes LinkedIn – the world's biggest professional network – as well as Twitter and relevant industry community sites (such as Spiceworks for IT pros).

The etiquette of social media is a bit different from that of email and phone conversations. Make sure your SDRs understand the medium and the specific Dos and Don'ts of each platform before diving in.

Social tips for SDRs
Get to know someone before you ask to do business. You wouldn't pitch at a dinner party (would you?).

Only send one InMail to a prospect on LinkedIn unless they respond. Any more feels like stalking.

Don't spam LinkedIn groups. Sharing relevant content is fine. Using the group as a dumping ground or a captive audience isn't.

Don't send a connection request until you've made a legitimate connection. It can be seen as faking an existing relationship.

Don't cross the creepy line. "I noticed on Facebook you were at M&M World with your kids!" (You don't have to use everything you know).

Make sure your own social profile is in order. This is a two-way connection: make sure you look worth connecting to.

The golden rule of social media is simple: give more than you ask for. Generosity is the best approach

! **The triple touch**

A social touch followed up within seconds via voicemail and email. Baddabing.

Facebook for B2B?
Some B2B professionals argue against Facebook as a business communications channel. We find Facebook can be an effective channel for marketing to your key accounts by promoting relevant content – we just don't use it for one-to-one SDR touches.

Social media (cont'd)

A sample InMail message

Showing how to initiate a conversation and progress the connection:

Subject: Great post!
Hi Dave, I loved your post on the 7 Deadly Sins of data management – I've sent it on to three colleagues. Given your views, I think you'd love our new data preparation toolset. Can you suggest some half-hour time slots this week that might work for you? I'll keep it super-short! Don

Social media (cont'd)

Jill Rowley's 5 social selling tips

Jill Rowley is one of the world's top social selling evangelists (and an Engagio investor). Here, she shares her thoughts on social selling (adapted from a Hubspot interview).

1) Build personal credibility
Make your SDR's social presence – and all their interactions – about helping people succeed in their jobs – not about blowing their own horns.

2) Always be connecting
Be wherever your prospects are and look for opportunities to help them further their goals. Retweet their tweets. Comment on their posts. (But don't be creepy – authenticity wins).

3) Bring content to the conversation
Content is the currency of social media. SDRs shouldn't just post your thoughts, they should add value by sharing relevant content. That includes content produced by your company and posts or pieces found out on the web (with attribution of course).

4) Sometimes listening is best
Reps don't always have to engage at every opportunity. Sometimes learning something important and responding in another channel is best.

5) Measure your returns
Social media can eat up a rep's time. It's important to be able to track engagements to make sure that time is well-spent. One of the many social media monitoring tools can help keep the whole team on track.

WHERE: designing Plays

We've looked at the three main channels for SDR interactions. Now let's put them together into your Plays. That definition again:

A Play is a series of steps that orchestrates interactions across departments and channels to achieve a business purpose for one or more buying centers at target accounts.

Pre-designed Plays are a way to ensure that all reps follow best practices throughout their account development work – from the first touch to the last – and that these touches are coordinated with Marketing and Account Execs.

The most successful teams design their Plays carefully and improve them continuously as they engage with prospects.

The well-designed Play
A well-designed Play looks at:

Channel diversification – the optimum combination of voice, email and social media touches plus coordination with marketing and other parts of the company (including the executive team where appropriate).

Number of touches – Three touches for Persona A. Twenty for Persona B, etc.

Duration – All touches in 3 weeks? Thirty weeks?

Roles – Who does what? Assign tasks to team members, including sales, SDRs, marketing senior execs. You don't need every email and every call to come from just one SDR.

While a Play that uses only a few touches is unlikely to penetrate a large account, simply throwing more touches at the problem is not the answer either.

"Reps are giving up too quickly… It takes between six and ten attempts (including at least four by phone calls) to properly prospect a given contact."

Trish Bertuzzi
The Sales Development Playbook

WHERE: designing Plays

The goal is a well-designed, neatly orchestrated Play that proves itself in the real world and improves over time.

A sample Play
Here's a sample play based on one from TOPO, showing SDR and marketing touches:

As we'll see in the next section, coordination is key.

But remember: Plays are like diets – they work if you stick to them.

Touch	Day	Step(s)	Description
0	Pre	Research	Find out 3 pieces of relevant informations
1	Pre	ABM ads	Build awareness with targeted ads
2	Pre	Dimensional mail	Package / postcards to decisions maker + influencers
3	1	Triple touch	Human email + voicemail + social (InMail)
4, 5	1	Double touch	Human email + voicemail
6, 7	3	Double touch	Human email + voicemail
8, 9	7	Double touch	Human email + voicemail
10, 11	13	Last chance	Last chance email + voicemail
Ongoing	Ongoing	Nurture	Share relevant insights ever 3-4 weeks

"Companies are still struggling with their touch patterns. A few years ago, it was just 'Do more touches!' Now it's more sophisticated: more about the mix and frequency.'"

Kristina McMillan
Sales Development Practice Leader, TOPO

"Multi-channel cadences simulate the richness of face-to-face relationships while keeping the costs down."

Ken Krogue
InsideSales.com

Part 10

The importance of coordination

The importance of coordination

Success with Account Based Sales Development is directly related to your ability to align all of your customer-facing teams in a coordinated strategy. There can be no silos.

Your football team
Think of your Account Based Everything program as a football team (American football that is – soccer is way too random):

The Coaches design the Plays.
These are often Marketers or SDR managers – ideally in partnership with each other.

Quarterbacks call the Play.
This is usually the Account Exec but might be the Account or Relationship Manager, for existing customers.

Players run the Play.
And you need lots of different positions. You wouldn't field a team with eleven wide receivers (they'd get crushed); or eleven linemen (the ball would just sit there).

If you really want to move the ball down the field, you need players in multiple positions working together as a team: SDRs, Marketing, Account Execs, Senior Execs – the whole line-up. Let's look at a few of your teammates.

Working with Marketing
As outbound Account Based Sales Development goes mainstream, the bar gets higher and higher. Without question, the winners will be those who best synchronize their sales and marketing teams.

In her book, Snap Selling, Jill Konrath talks about the 'harried buyer' who has too many demands on his time to be able to make yours a priority. Throwing a new problem on to his list is the last thing he wants to do.

Disrupting an existing list of priorities is not easy. There's just too much resistance. So trying to do it alone, as an SDR, is a low-probability exercise. Instead, you need the coordinated activities of marketing and sales to challenge the prospect's priorities and make room for yours.

"You want software that helps align Marketing and Sales. You don't want to bake in silo-thinking."

Matt Amundson
Vice President –
Sales Development
& Field Marketing,
EverString

The importance of coordination (cont'd)

Beyond hand-offs

There are no 'hand-offs' in an Account Based Everything model. Instead, Marketing and Sales work together from the very start, and throughout the revenue cycle.

Unlike traditional demand gen, which has a sequence of hand-offs from Marketing to Sales Development to Sales, ABE functions are intertwined at every step. It's not just a more effective way to sell – it's a much better buying experience as well.

In the big picture, your company doesn't care about 'marketing generated opportunities' or 'sales generated opportunities'. The important thing is opportunities. Period. The best teams work together and take credit together. At Engagio, Marketing and SDRs earn quota credit for the same opportunities. This encourages collaboration, not in-fighting.

According to research by SiriusDecisions, buyers want Marketing and Sales involved equally at EVERY stage of the buying process.

"The integration of Marketing and Sales Development is dramatically better than each working on their own. You don't even need the data – which is everywhere – it's just intuitive: working together works better."

Craig Rosenberg
Co-founder and Chief Analyst,
TOPO

"There is no longer a clear hand-off of a lead between Sales and Marketing. Marketing increasingly is nurturing and advancing prospects through the entire sales process. That's why there's an increased focus on conversion rates rather than simple lead numbers. It also means that Sales and Marketing have to collaborate more than ever."

Peter Mollins
VP Marketing,
KnowledgeTree

Marketing's role in account research

Marketing doesn't just help in the WHERE part of ABE, they also help in the WHO and WHAT stages: sourcing account data, finding contacts within accounts and researching accounts to generate the commercial insight that's so important.

For many B2B companies, Marketing owns this important function (working closely with Sales and SDRs). It makes sense: Marketing should always have an eye on the wider market, the big trends, the pressing issues and the emerging pain points. Harnessing this perspective to build richer, better-informed account profiles and personas will always empower the SDRs to have better conversations with the right people.

Marketing may also see contacts within a target account before they appear on the Sales radar screens. Web, email or content consumption activity within an account can give a valuable heads-up to SDRs that something is going on.

Again: an integrated effort from a tightly aligned team is what works.

"Marketing and Sales Development are the two departments tasked with having the first conversation with future customers. They're the two friends in the group who need to be on the same page when they approach two strangers at the bar and ask for phone numbers.

Specifically, marketing needs to coach Sales Dev on the language and product positioning that they're after, and Sales Dev needs to coach marketing on the effectiveness and feedback from customers engaged with these campaigns."

Robby Allen
Director of Sales Development,
Zenefits

Marketing channels for account based Plays

The SDR Plays outlined above should also include marketing touches, often across a few key channels.

Events
Owned events such as dinners and meetings at third-party events are ideal for Account Based Plays.

Or hold a workshop for the whole buying team – at the customer's offices or at yours.

(!) Tip:

Executive invitations should come from someone at the same level or higher; you are unlikely to get an executive to attend an event just because an SDR reaches out to them

Direct Mail
Simple personal letters sent by post or high-value, dimensional mail pieces are a great way to supplement the Play with tangible touches. Just think of how many emails you get each day, compared to how many packages show up on your desk.

We've seen ABE teams send iPods pre-loaded with audio content, remote-control cars (where you need to take a meeting to get the controller), cases of wine, coffee gift cards… and simple, hand-written notes. It's the resurgence of the VITO ("very important top officer") letter.

(!) Tip:

Offers sent by mail are perceived as 24% more valuable than offers viewed only on a screen. U.K. Royal Mail, February 2015

Display advertising
With techniques like IP-lookup and retargeting, account-targeted display ads can reach only the people inside target accounts.

And sponsored posts on LinkedIn, Facebook, Snapchat and Twitter let your micro-target right down to the persona level.

Use display ads to promote your account-specific content and messages, choosing content on the issues that sync with your play and persona.

Personalized content

Turn generic marketing content from your content marketing programs into highly-targeted or even personalized content for use across your Plays.

These can be important touches – and, when they come and get it, you get important signals about what each buying team is most interested in.
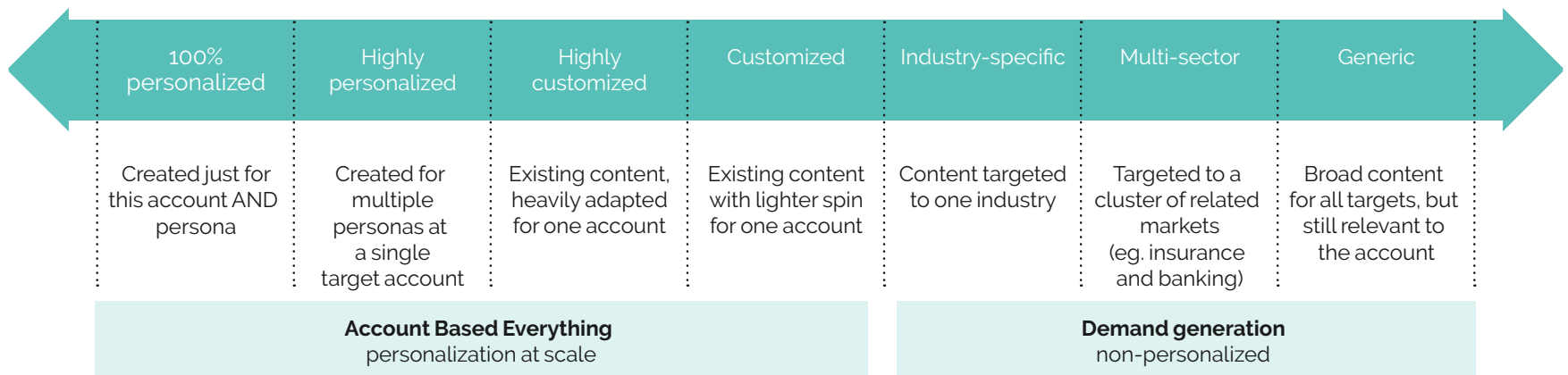
Marketing that doesn't scale
Buyers are overwhelmed by slick campaigns designed by vendors trying to 'scale up' their marketing efforts. Against this background, a high-touch, low-scale, personal touch can really leap out and get noticed.

Dimensional mailers, handwritten letters, Scrabble tiles spelling out the customer's name…   For your most important accounts, anything that helps you stand out is worth it – especially if it doesn't scale.

"Do things that don't scale."
Jason Seeba, CMO, Bloomreach

The content personalization spectrum

100% personalized	Highly personalized	Highly customized	Customized	Industry-specific	Multi-sector	Generic
Created just for this account AND persona	Created for multiple personas at a single target account	Existing content, heavily adapted for one account	Existing content with lighter spin for one account	Content targeted to one industry	Targeted to a cluster of related markets (eg. insurance and banking)	Broad content for all targets, but still relevant to the account
Account Based Everything personalization at scale				**Demand generation** non-personalized		

Working with Account Executives

Quota-carrying Account Executives (AEs) are expensive resources. The whole idea of sales development was designed to keep AEs focused on closing deals instead of chasing prospects.

But in Tier 1 and Tier 2 accounts – the big deals that will make or break *their* targets – Account Execs don't just appreciate being included, they insist on it (and for good reason).

Yes, there are still old-school 'sales animals' that hate to collaborate or will resist new tools. But these are quickly giving way to enlightened sales professionals who understand the value of an integrated, Account Based approach.

"With cross-functional account teams, you decide how often meetings happen and who attends which ones. There's no need to overload the Account Exec."

Tom Scearce
TOPO

That's why today's Account Execs have increasingly become the quarterbacks of the ABE team. They care about these accounts and they want to manage the relationships – while at the same time, getting the most value from their sales development and marketing team members.

Bringing in company executives
If you want to reach an executive at a target company, you'll always have the most success if it comes from an executive at your company. This is a big card to play, so you can't over-use it. But for key touches in Tier 1 Plays, it can be hugely effective.

Working with Account Executives

Tips for bringing AEs into Plays

• Get AEs on board early, at the strategy stage

• Get their active involvement in designing Plays

• Don't just assign tasks to AEs out of context – they should know the Play is running at one of their accounts

• Key emails should come from the AE (after their personal review and approval)

• AEs may be the best to send high-value reports or studies

Team Selling: use the whole company
Think creatively about how touches from non-typical roles at your company can help your Plays. You can mix up the demographics of the sender with different genders, races and styles – you never know what will resonate best with the target. At Engagio, we run a Play for certain prospective customers that includes an email from one of our developers, asking if there are any features they'd like her to build.

The point is that when someone buys your product, they're buying the whole team – not just the sales rep. So why not include members of your whole team in your Plays?

Coordinated Plays

Plays can go way beyond basic prospecting into target accounts to include every step of the buying journey – including Customer Success – as well as customer-facing interactions from any department.

If it matters to your business, there's a Play that can help you achieve it. After all, these critical goals and processes demand and deserve careful attention and pinpoint execution.

Your extended Plays might include strategic initiatives and tactical programs such as:

Handoff Plays
Anytime a customer's primary contact is changing from one owner to another, the last thing you want is to fumble the handoff. If a prospect agrees to a meeting with an Account Executive, a best-practice handoff can include an email introduction to the AE, followed a few minutes later by an email from the AE directly, and a series of follow-ups if the customer doesn't respond for any reason. Similar, when the AE closes a deal, they can launch a best-practice Play to introduce the Customer Success Manager and start the onboarding process.

Deal acceleration Plays
Sales development and marketing doesn't stop when the account moves into the deal stages. Instead, they should support the AE to increase win rates, justify a higher selling price, and increase deal velocity. A Play that surrounds the account with broader awareness and touches influencers that the AE isn't talking to works wonders for this. Targeted Account Based advertising and retargeting programs are a great tactic here.

Executive alignment Plays
Design and run a Play to connect your executives with executives at customers and prospects. This will be built around highly-relevant emails that come directly from your executives. But it can also include direct mail and targeted ads in places like LinkedIn to raise your brand's profile just as the executive approaches are being made.

Upsell/cross-sell Plays
Upsell Plays orchestrate interactions with customers you already know, helping them to get value from their solution so they buy more. Cross-Sell Plays are about introducing additional solutions, often to new users and buyers at the same company – ideally using your prior success as a starting point. Again, marketing has a role to play here, keeping the new solutions top-of-mind during your upsell/cross-sell campaigns.

Conference meeting Plays
Events cost a lot of money to create or participate in. You can't just wait for the key people in target accounts to show up at your event or at your stand. Running a coordinated Play around an event is a great way to maximize your return on investment by setting up meetings with the right people from the right accounts. An email/voicemail/social media blitz can fill your time slots with high-value conversations. And social media or banner advertising can reinforce the urgency and relevance.

Coordinated Plays (cont'd)

Customer onboarding Plays

Your customer experience starts with a professional, proactive onboarding experience. Instead of leaving that to chance, design a Play to orchestrate all interactions across channels and departments to bring a new customer on-board in the best possible way. You might send customers a welcome pack, send a letter from a senior executive and drop a 'here to help' email from the head of customer service.

Customer marketing Plays

Want to reach out to a customer asking for a reference, case study, or other ask? Streamline the process with best practice emails. Orchestrate the ask across multiple customer personas from multiple players on your team and your chance of success goes way up.

Customer Renewal Plays

Renewals are the lifeblood of many B2B and SaaS companies. A well-designed Play can manage and automate the ideal 180-day, 90-day, 60-day, 30-day, and 15-day interactions that lead to increased renewals. This is an all-hands Play with notes from Account Execs, Customer Service and senior executives – all singing from the "Stay with us!" hymn sheet.

An accounts receivable Play

Late payment can cripple a business, choking off cash flow. A Play engineered to chase up late payment can pay for itself many times over. Late payment should trigger a series of escalating interactions, starting with your Accounts Receivables team to their Payables team; then from your Account Executive to their Business User; and finally from your Executive to Executive if needed.

Trigger event Plays

Sometimes a trigger event in a target account is a defining moment and creates a short window of opportunity. Have a Play pre-scripted that can kick off the moment the trigger event is spotted. For example, the hiring of a new VP can kick off a ten-step Play that brings in SDRs, Marketing and the Account Exec.

"Shake the Tree" Play

At Engagio, we have a Play that an Account Executive can use if an account goes cold after showing initial interest. The first step is a personalized email from our Sales Manager to their main point of contact. If that doesn't drive a response, the next email comes from Engagio's CEO to the executive sponsor at the prospect. Next is an email from our Customer Success VP. If that still doesn't work, we try a very different email such one from an individual engineer or marketing manager. By switching personas, styles, and messages, we're far more likely to reactivate the account than if the AE alone kept persisting.

Time for a time-out

We've looked at the Who, What and Where of ABSD. Who do you want in your crosshairs? What can you do to engage them? Where will you do it?

In the bad old days, a lot of the decision-making about the accounts to target and the individuals to profile was left to the new recruits. Now it's a serious, strategic job for everyone right up to the top brass.

You've got to search for true relevance in your messages, which means knowing the difference between 'thought leadership' and real, customized commercial insight.

And you've got to design Plays that deliver your insight to the right people across multiple departments and channels.

Wherever this happens, a mix of channels will always outperform any single one. It takes total coordination and zero tolerance for silos.

Next up, we're looking at scaling your sales development operation, equipping your people with the right tech, and measuring your successes.

Part 11

Growing and managing a sales development team

Growing and managing a sales development team

The Account Based Everything model is built on the professionalization of the sales development discipline. In a successful ABE strategy, you can't just hire a bunch of young Sales Development Reps, give them a list of companies, and say 'Good luck'.

This section of the Clear & Complete Guide focuses on **building a professional sales development team that consistently delivers the big opportunities that drive rapid growth.**

The goal is nothing short of excellence at scale. In an account based environment, every at-bat is important. While you don't want to remove the ability for a smart SDR to use his or her judgment, you do want to instill focus, efficiency and control to the SD process.

Establish your sales development goals
There are many reasons to build an Account Based Sales Development team. The important thing is to know why you're doing it and to make sure your key stakeholders agree.

Your goals will reflect your unique situation:

An early-stage company might need to give their Account Execs more at-bats as a priority. That would mean a lower qualification threshold: more meetings, more learning and a fully-utilized sales team.

A mature SaaS vendor with a roaring inbound machine might need to maximize AE productivity and focus on key accounts. That would mean a tighter, longer sales development process.

Building on success, your company may need to penetrate a new market, from the top down. That might mean a focused 'tiger team' that runs alongside your existing demand-gen machine, but is focused on one market.

Your priority might be revenue growth from existing customers. That means a concerted cross-sell/upsell program targeting the biggest opportunities and working closely with Customer Success.

You get the idea. Your situation guides your goals, which guide your strategic decisions. Even if your goals seem obvious to everyone, we urge you to write them down and get all your key stakeholders on board.

A value-add mindset

Remember, this is sales *development*. Big opportunities always develop over time. If all you want is to attack a market and generate meetings fast, that's not an ABSD program.

This is about penetrating big accounts and landing big deals. The 'pile 'em high and sell 'em quick' mindset doesn't apply. Instead, the most successful ABSD practitioners have a 'value add' mindset: they define the role as:

Proving relevance to their prospects, advising on their most pressing challenges.

Adding value to the conversation by reflecting the prospect's real pain points and finding ways to help – even before selling starts.

Adding value
One team we've seen has the target of getting high-value prospects on the phone with a market insight expert for a 30-minute trends-and-implications briefing. There's no selling at all – until the relationship is established and the prospect's challenges are well understood.

Qualifying your named accounts

The sales development process comes down to an extended period of relationship-building and, simultaneously, account qualification: determining if the account is worthy of your sales resources.

Account qualification is a bit different in an outbound ABSD approach than in traditional sales development.

In an inbound world, qualified opportunities using the classic BANT qualification (Budget, Authority, Need, Timeline) tends to work quite well. It's a quick and easy set of filters that helps focus the reps on opportunities that are likely to convert in a reasonable timeframe.

More recently, the ANUM qualification (Authority, Need, Urgency and Money) has started to replace BANT in many sales development teams. To us, ANUM is just a softer version of BANT – but they both work fine in the typical inbound model.

But for outbound Account Based Sales Development, asking reps to filter down by Urgency (timing) and Money (budget) will often create too high a bar. The result is that too few meetings are passed to Sales.

Recognizing that the biggest deals will always take more time and that budget may not yet have been set even in very attractive accounts, we recommend a much simpler filter for ABSD: setting introductory meetings using AN for Authority and Need.

If they fit the Ideal Customer Profile and the authority and need are present… you should be good to go.

The goal for ABSD should be getting a meeting with the right person at the right companies.

Meetings or opportunities?
Trish Bertuzzi and The Bridge Group identify two very different SDR strategies: one is to get introductory meetings, the other is to generate qualified opportunities.

For complex purchases where the need to change is less obvious, a 'get the meeting' model may be best. This brings the sales exec in early to try to create the need. For categories where active buying is happening now, the 'hunt for live opportunities' model is often best.

How SD teams split today:

Setting introductory meetings	38%
Setting semi-qualified meetings	18%
Passing fully qualified opportunities	42%

Source: Bridge Group

Helping your SDRs apply 'AN' qualification

Authority and Need are still fairly abstract, fuzzy terms – especially for inexperienced SDRs.

In your training, you'll want to make these concepts more specific and granular, building in as many objective measures as possible. You'll never remove the need for subjective judgment, but you can make sure concepts like Authority and Need have some granularity. For instance:

"We define 'Need' as more than one contact in the account agreeing that one of the following five pain points are present in the target account."

"Defining 'Need' means establishing that the prospect has a CRM system but does NOT yet use predictive analytics. Ideally, they are frustrated by their ability to identify their best opportunities."

"To us, 'Authority' relates to these specific target personas with the following reporting structures…"

"'Authority' can only come from budget holders at Director level or above. Lower than that and they can't drive our deals through the organization."

Red Flags
Part of qualification is also looking for attributes that would disqualify an account (for now), such as:

- Recent purchase of a competitive solution
- Lack of critical infrastructure needed to deploy your solution
- No individual 'owner' of a given problem
- Imminent platform change that would stall your deal

Make sure these 'red flags' (or, more accurately, their absence) are part of your qualification screening, too.

This doesn't mean you should remove those accounts from your Target Account lists, especially if they're Tier 1 or Tier 2 accounts. It simply means they need more development before passing to sales.

SDR compensation

How and how much should you pay your SDRs? The average for the role has stayed pretty flat for the last few years, so this Bridge Group data is a good benchmark:

Average SDR compensation	
Base salary	$46.0k
On-target earnings	$72.1k
Base % | Variable %	64% | 36%

Source: The Bridge Group:
Sales Development 2016:
Metrics and Compensation Research Report

Factors that drive compensation include experience, average selling price, the region, the vertical market and the goals of your SDR team (whether they're meeting setters or lead qualifiers). The Bridge Group offers a handy online Compensation Calculator that can help you set your own compensation scheme.

The variable part
To keep things simple, the variable portion of the compensation package is usually based on only one or two factors. Of the five most common factors, a Bridge Group study shows that first two are most used:

· Number of meetings/opportunities passed
· Number of meetings/opportunities accepted
· Value of opportunities won
· Number of opportunities won
· Number of activities

Companies paying the largest share of their variable comp on "Number of Meetings/Opportunities Passed" have a 6% higher Pipeline Power Score than the average.

Companies with the largest share of variable comp paid on "Opportunities Won" see an 11% lower than average PPS.

Bridge Group

SDR compensation (cont'd)

Best-practice advice is to be careful about compensating on closed revenue or opportunities won – SDRs can't control these, so they may find them de-motivating instead of motivating. Also, long sales cycles and short SDR tenures mean they may never see much of the closed business they initiated!

Finally, paying too much of the variable comp based on won opportunities tends to turn the SDR into sales support administrators – to make sure their deals get over the line. An enlightened manager won't let that happen.

Compensation metrics for SDRS

Elements that define commision achievement
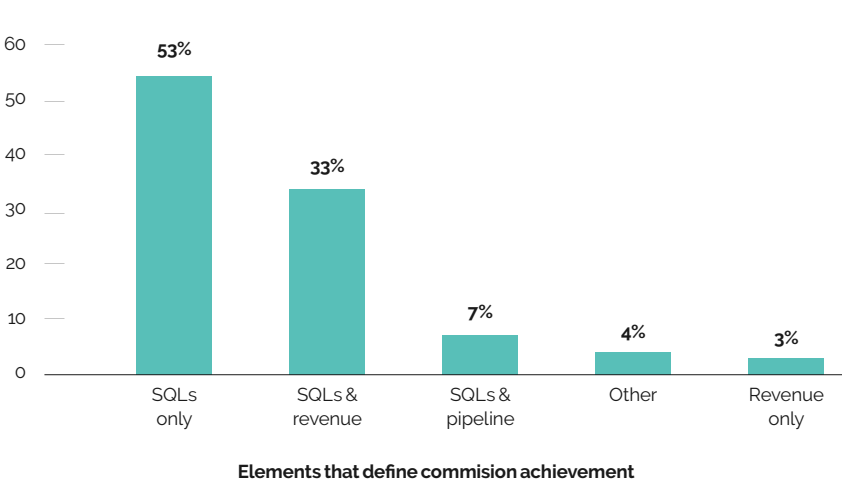
Source: TOPO The 2016 Sales Development Benchmark Report
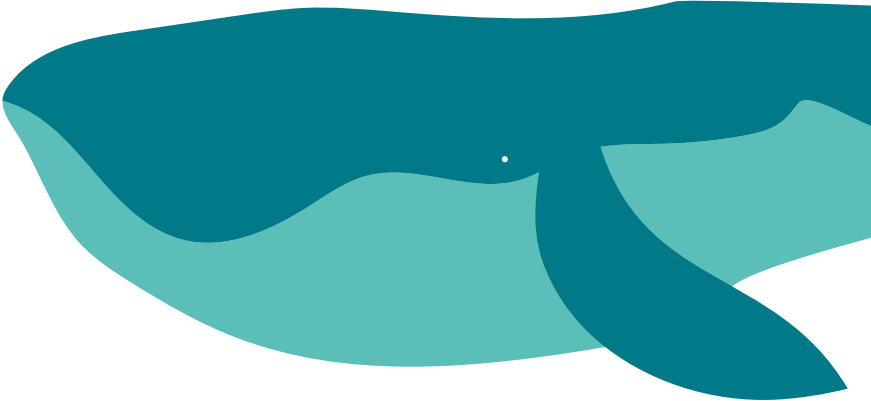
SDR compensation (cont'd)

"Meetings held per week is a great leaderboard metric for an SDR team. It tells you which rep is bringing the most customers in the door. It's important that it's weekly. You might have bad days as an SDR, but you can't have bad weeks. Sales development is a weekly business."

Robby Allen
Director of Sales Development,
Zenefits

SPIFFS and Competitions
SDRs are competitive types. That's why so many SDR Managers create fun contests to motivate the right behaviors.

Here are some ideas:

Break into teams and compete for prizes
Create teams randomly or do it by location if your SDRs are in different offices. Then let the games begin!

Run timed 'sprint' competitions
Pick metric and give SDRs a day or two. Short and fun.

Create a new metric
Combine KPIs into one magic metric, with weightings for the different components. Then make that the killer KPI to track and compete against.

Run a 'best email personalization' contest
Prizes for the SDR who creates the most relevant email from the master template.

Simply celebrate success in public
You don't always need winners and losers. You can call out any extraordinary behavior or success in a team meeting or by email or Slack. Attention and appreciation are their own rewards.
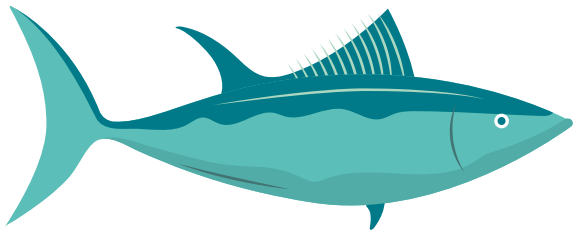
Quotas

Once you know your compensation metrics, you need to set your goals and quotas. As with any target, the key is to set a level that will stretch your SDRs to deliver their best performance – but that doesn't set them up for constant failure.

The reality is that there is no one source to tell you where to set the quotas. It will vary on deal size, the percent of pipeline you expect to get from SDRs, your SDR to AE ratio, and many other factors. This data from TOPO shows some averages by Average Contract Value, but remember they are just that – averages.

Another data point to consider, from our friends at EverString (who know their way around the SDR discipline):

- 12 meetings per month per SDR
- 6 opportunities per month
- 2 Stage Two opportunities per month (active buying cycle)

SQLs generated per SDR per month
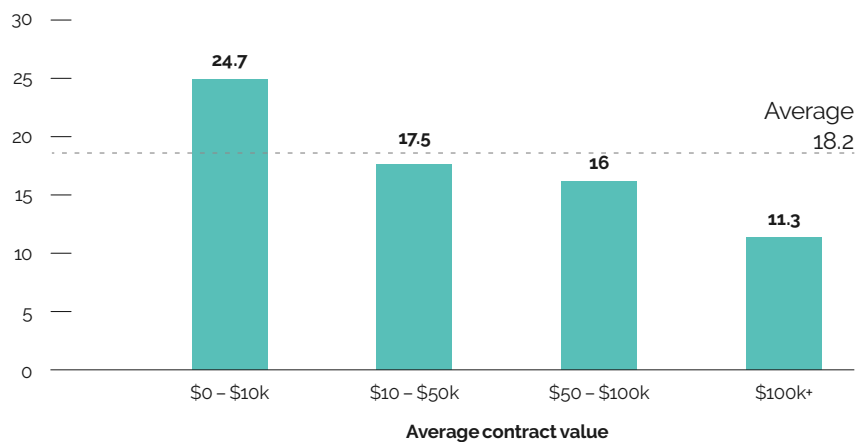
Source: TOPO, The 2016 Sales Development Benchmark Report

Quotas (cont'd)

Whatever you set quotas at, track how many SDRs meet their number each month. The Bridge Group also has an excellent Sales Team Grader that lets you compare your own team's performance against the benchmarks. We recommend doing that (it takes five minutes).

Middle Rep
98% of goal

65%
at/above quota

20% 30% 40% 50% 60% 70% 80% 90% 100% 110% 120% 130% 140% 150% 160% 170% 180% 190% +

Bottom fifth
Average 59% of goal

Top fifth
Average 150% of goal
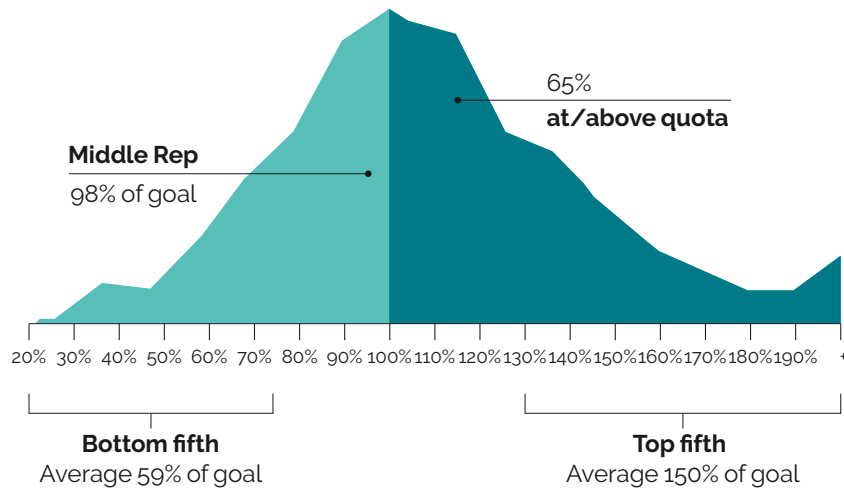
A screen from the Bridge Group's Sales Team Grader

How Engagio does it
At Engagio, we set our SDR quotas based on "points" earned for meetings and opportunities at the accounts they cover. They earn points for all meetings and opportunities, regardless of whether they directly sourced it or merely influenced it – this encourages cross-department collaboration, rather than fighting over who gets credit.

Quotas are set so that if the SDRs make their quota, the AEs will have enough pipeline to make their quotas (plus some padding):

• Inbound — the quota is 28 points / month per rep. They earn 1 point for each qualified opportunity created at non-target accounts.

• Outbound — the quota is 36 points / month per rep. They earn 1 point for each qualified meeting (Director or higher) at Target accounts, and 1 point for each qualified opportunity at Target accounts.

Engagio has a ratio of 3 SDRs for 4 AEs.

Where the sales development team reports

The sales development team can report to Sales, to Marketing or be its own department. All of these can work well, as long as it's run by a dedicated leader who understands the discipline and its role in the Account Based Everything ecosystem.

Percentage reporting to sales by focus
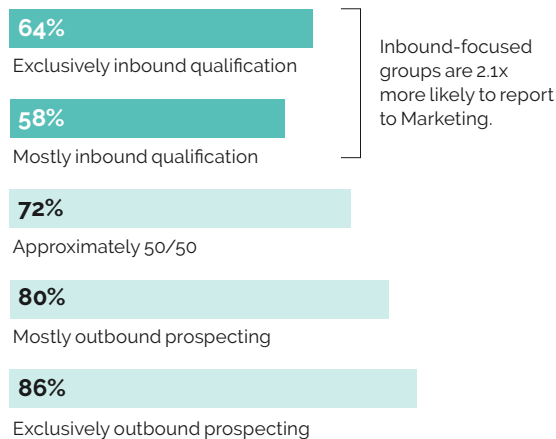
64%
Exclusively inbound qualification

58%
Mostly inbound qualification

Inbound-focused groups are 2.1x more likely to report to Marketing.

72%
Approximately 50/50

80%
Mostly outbound prospecting

86%
Exclusively outbound prospecting

Source: The Bridge Group: Sales Development 2016: Metrics and Compensation Research Report

It's still most common for SDR teams to report into Sales. This is likely because SDRs often serve as a "farm team" for Sales, and so it makes sense that Sales does the hiring and management. Also, the more the SDR team focuses on outbound prospecting, the more likely it is to report to Sales – since the prospecting skills are closer to the core sales skillset.

That said, we've seen some ABSD teams move into Marketing, which argue is the home for best practice ABE:

- Marketing and SD are both focused on creating pipeline, while Sales is focused on closing it
- Marketing and SD both need a longer-term mindset, in which opportunities are nurtured
- The concept of Account Based Everything requires orchestrating ABM and ABSD activities into coordinate Plays

Our advice is that the ABSD team can live in either Sales or Marketing, but what matters is (a) Sales is responsible for hiring and training and (b) Marketing is responsible for coordinating activities and Plays.

"The Marketing and Sales Development motions are really similar – and the messages must be highly synchronized, so the natural home for Sales Development may be Marketing."

Matt Amundson
Vice President –
Sales Development
& Field Marketing,
EverString

Specializing within outbound sales development?

Some SDR departments are themselves split up into even more specialized teams:

- By industry
- By region
- By account size

We've seen SD leaders who swear by this – after all, specialization into Sales and SDR made sense, as did further specialization into inbound and outbound Sales Development, so why go further? The more you speak to the same audience, the better, the argument goes.

But we've also seen those who warn against it. They feel that over-specialization decreases management flexibility: if you lose a 'mid-market healthcare SDR' you're left with a very specific gap to fill. Similarly, a specialized SDR may find it harder to move up into a sales role in a different niche. Of course, the bigger your team is, the less likely these concerns are to happen.

The rule of thumb might be to dedicate a portion of your team to a specific market only if that market represents a significant segment that's large and important to your business.

"I like specialization. Every time I break out a team to focus on a market size or a vertical, I see big uplift. It lets us optimize what works."

Chad Burmeister
Sr. Director,
Sales Development, RingCentral
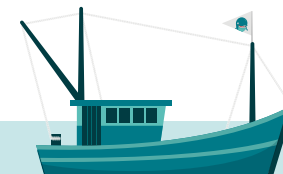
Recruiting

Different leaders look for different qualities, but they do tend to converge on a certain type:

Most prefer very little experience – often hiring straight out of college – and some actually avoid SDRs with many years' experience. They feel that old-school sales development processes are so different that they often don't correlate with success in the new model.

Some like hard-workers who may not be academic high-fliers – others look for high-powered types from the very top schools. It varies by the company itself and the kinds of accounts the rep will be calling on.

Some like seeing that a parent or family member was in Sales – giving the rep some understanding of the job, even at entry level.

All seem to like a typical 'Sales profile' – a confident, ambitious, extrovert with the ability to prioritize, juggle and manage time.

Everyone wants 'smart' – the new SDR role has to craft messages to audiences. That takes intelligence and empathy.

Grit helps – this is no place for the easily discouraged.

Of course, different kinds of SDR are suited to different kinds of prospecting. In your company, you may find they don't look very different from your best AEs – they just have less experience.

"For great sales development reps, I'm looking for assertive go-getters who are interested in Sales and can handle objections confidently. When you add an account based approach, I add creativity to that list – they have to be able to craft a message to a person."

Vice President –
Sales Development
& Field Marketing,
EverString

In 2016, the average required experience for an SDR hire was 1.3 years - an 18% annual rate of decline since 2009.

The Bridge Group: Sales Development 2016: Metrics and Compensation Research Report

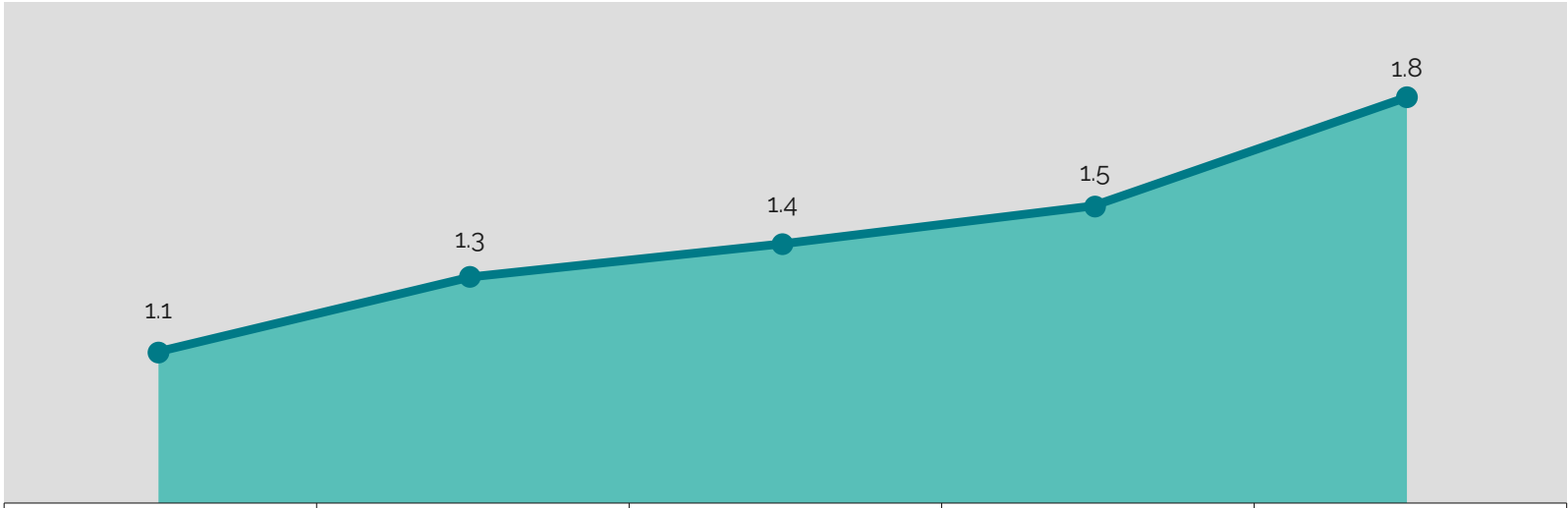"95% of sales development leaders purposely hire SDRs with less than two years of experience."

TOPO: The 2016 Sales Development Benchmark Report

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Recruiting (cont'd)

The bigger the deal, the more experience is required:

Required Experience by ASP
In years

Research shows that experience of SDRs tends to rise with deal size, as you might expect

Source: Bridge Group

Your hiring process

For most companies that deploy them, the SDR team quickly becomes the engine of the revenue machine. You need more SDRs to grow, and as SDRs get promoted it creates an even bigger demand for new SDRs – and it's a demand no one can afford to leave to chance.

As the SDR team becomes increasingly professionalized, so do the hiring processes that feed it. You'll need a rigorous, systematic approach to hiring that's actively managed as a strategic initiative.

The hiring pipeline
Many SD leaders prefer cohort hiring – hiring in groups – instead of a rolling process of single hires, for these reasons:

• It regularly focuses everyone's mind on hiring as you recruit a new 'class'
• It leads to more efficient onboarding
• New hires bond with each other and help each other succeed

To feed the process, you need to create and manage a hiring pipeline just as you would a lead pipeline. That means knowing how many resumes you need to see in order to feed your initial phone interviews, your in-person interviews… all the way to offers and acceptances.

If you map out your pipeline and keep an eye on 'conversions' at each step, you can see if you're on track for your hiring needs or falling behind. Hiring is essentially a long sales cycle: you need to keep an eye on leading indicators or you'll find yourself short-handed – and missing your targets.

"Hiring top talent is the fastest way to gain an unfair advantage in Sales Development. Leaders who spend 50% of their time recruiting future leaders will consistently outperform their peers."

Daniel Barber
VP Sales at Datanyze

For Netsuite, 10,000 resumes lead ultimately to just 60 hires. They use hiring managers to do initial interviews, followed by a panel of three business development reps (screening for culture fit) and two Account Execs who came up from Sales Development.

Onboarding, training and coaching

New SDRs don't start contributing to revenue on day one; they have to ramp up. The faster you ramp them up, the sooner they're feeding your pipeline and the more value you get from them for the duration of their tenure as an SDR.

So your onboarding process needs to be as rigorous as your hiring.

In a 2016 Bridge Group study, ramp time (time to full productivity) fell from 3.8 to 3.2 months despite the fact that companies are hiring less experienced reps. That's evidence that we're all getting better at onboarding and, given the short tenure in the role (see next page), this has to continue.

Bryan Gonzalez of TOPO suggests three principles for SDR onboarding:

1. Make it SDR-specific
Hands-on onboarding that focuses on specific SDR skills is far better than general introductions to the company, market and product. Teaching core skills such as buyer-centric messaging, outreach best practices, and live call execution is essential.

2. Use hands-on management
Instead of dropping SDRs into the deep end, managers have to stay with them on the front line, giving hands-on coaching and training from the very beginning. 'Trial by fire' too early could actually prolong ramp time instead of shortening it.
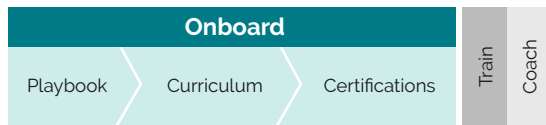
3. Make it intensive
Gonzalez argues that onboarding should take one month instead of three. That means an intensive management effort in a focused onboarding program, so that reps are hitting full quota targets in month two.
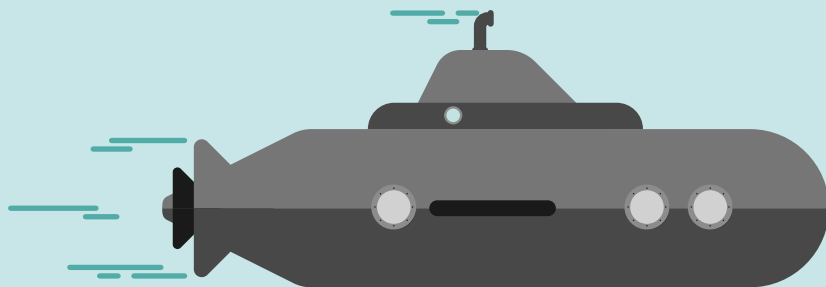
Onboarding (cont'd)

The TOPO SDR Onboarding Framework looks like this:

Leverage the SDR Playbook – TOPO recommends capturing the entire SDR role in what they call a Playbook (which is different from the Plays we talk about in this guide). Then start the onboarding program with the SDR Playbook: everything they need to do the job effectively.

Follow an onboarding curriculum – a specific sequence of training modules organized into 2-hour sessions focused on specific topics (key buyer personas, etc.).

Reinforce lessons with certifications – increase retention of the onboarding material through testing and certification on key skills (e.g. an objection handling test).

The TOPO framework shows that the SDR development goes on with continuous training and coaching – we'll discuss that next.

Training & coaching
Creating effective SDRs doesn't stop after onboarding. The best teams are built on continuous training and coaching.

Training
The SDR training program needs to be as formal and systematized as the onboarding process.

Your SDR training program should include all the job-specific skills, such as:

• Effective researching
• Call preparation
• Personas and their drivers
• Core industry trends and issues
• Plays and their touches
• Product training and updates
• Your tools and internal processes
• Overviews of your competitors
• Objection handling
• Use cases and case studies

Whenever possible, use people who have done the SDR role to contribute to – or even deliver – the training modules. That makes sure you're always connecting the skill to the job.

> **Tip: "Nothing beats role-playing as a form of training."**

Aaron Ross and Marylou Tyler
Predictive Revenue

Coaching

Coaching is a critical aspect of managing SDRs. You're turning inexperienced graduates into pipeline creators. That doesn't happen without front-line coaching sessions in which the manager can zoom in on specific skills gaps and reinforce positive behaviors.

Sales Development Managers should commit to 4-6 hours per month of coaching per SDR, including three activities:

1. **Observe what they're doing** – watching them interact

2. **Diagnose their behaviors** – and align them to the defined process

3. **Prescribe specific actions** – to encourage correct behaviors and enhance skills

There are many behaviors to monitor but coaches need to focus their attention on the critical skills of the SDR role: outreach, messaging, call skills, Play cadences and metrics.

Good training doesn't just improve SDR performance, it improves job satisfaction and helps keep them in role longer.

SDR coaching hacks
Jason Richman, Senior Sales Manager at Hubspot, suggests these SDR coaching techniques:

- Team competitions – Whenever a meeting is created, post it to the CRM system and make it a competition between reps

- Group call reviews – Hubspot holds weekly "SDR Film Clubs" to review and analyze recorded calls by their rock start SDRs

- Peer mentorship – Connecting new SDRs with top performers for one-to-one mentoring

- Manager one-on-ones – Weekly meetings to review pipeline, Play activities and call recordings

- Call assists – Once a week, Jason books an hour with each rep to make connect calls together. He doesn't participate in the calls but is there to suggest questions and review the call right away

Given Hubspot's hyper-growth, these are tips we'd all do well to follow.

(Thanks, Jason).

SDR job tenure

Sales Development has one of the shortest job tenures of any role in business. TOPO puts the average at 14.3 months while Bridge Group shows a 14 month average – a sharp decline from the 2.4 years seen in 2009.

Think about that. The average SDR stays in the job for 14 months. Subtract three months for onboarding and ramp and you've got less than a year of full productivity before the rep moves on.

If 'moving on' means moving up into an AE role with your company, it doesn't hurt quite as much. But if your company only sells to enterprises, you're probably losing them entirely (you're unlikely to move them straight from SDR to an enterprise AE role).

Clearly, it would be great if you could increase the average tenure of your SDRs, but most experts accept that short tenure goes with the territory. This is a very tough job, full of rejection and prone to burnout. It's populated by ambitious (impatient) young people who are eager to get into Sales – at double the income and glory.

Put that all together and it's no surprise that SDRs move on so quickly.

Yes, you can extend the tenure of your SDRs with a lot of attention, great training and mentoring and a full commitment to an account based approach. But you're unlikely to push the average tenure much closer to two years.

We like the way Craig Rosenberg thinks about it:
"The short tenure is a trade-off. In return, you get awesome, motivated young people who absolutely kill it for a year or so."

Promotion paths

Most SDRs see the role as the first stepping stone for a career in Sales. That's great for you – it's a source for people who often become your best Account Execs – but it also puts a strain on the sales development team, constantly draining it of its best reps.

To give SDRs a sense of career progression within the role, many companies implement a series of step promotions:

- Associate SDR – until they make the grade
- SDR – during full productivity
- Senior SDR – as they progress to mentor others

These micro-promotions progress in defined, 'Ramp-Achieve-Advance' cycles that last from four to six months each.

Micro-promotions are popular (as the table shows) but you may also need defined paths into other sales development roles (such as outbound) and a path into quota-carrying AE roles.

Type of career path/promotion tracks	
Step-promotions (Junior SDR, Associate SDR, Senior SDR, etc.)	46%
Promotion across teams (Inbound, outbound, enterprise, etc.)	35%
Into a quota-carrying role (e.g. , SDR to AE, etc.)	58%

Source: Bridge Group SDR Report

The bottom line: Carefully managed promotions are an important part of running an SDR team. But don't let promotions happen too soon – you don't want to always be losing your best SDRs!

Companies with step (micro-) promotions achieve a 6% higher Pipeline Power Score. But companies with a defined SDR-to-AE path actually achieve a 9% lower PPS (robbing Peter to pay Paul?)

Bridge Group

Time management

Like everything else in successful ABSD teams, the daily schedule of the SDR is never left to chance. Time management is reported as a primary cause of reps failing to meet their targets, so a tightly defined schedule is critical.

The schedule should be based on the daily goals and activities needed to achieve the monthly quota. To do this, blocking out specific times for specific activities is key. The goal is to carve out one activity at a time, giving it total focus, then moving on to the next activity to keep fresh.

Do the math

If you need 8 connected calls a day to hit your targets and each takes 5 minutes, allow 40 minutes a day for these calls. And if you need to make 40 double-touches (email plus voice mail) with each taking 6 minutes, that's four hours of DTs per day.

A sample schedule

TOPO offers this daily schedule with notes for guidance:

8 - 9:30am Follow-up responses/ immediate outreach	Queue up prospects the previous day to begin calling immediately in the morning. Follow up on any email responses as well. Set a goal to accomplish before taking a break e.g. make 10 calls.
9:30am Coffee break	Schedule breaks every 2-3 hours.
10 - 12pm Double touches (20 DTs = 40 touches)	Schedule dedicated blocks of prospecting time on your calendar that nobody is allowed to interrupt. Stay productive by setting mini-goals for these blocks. For example, you should complete 20 DTs in the double touch block.
12 - 1pm Lunch	By lunch, you should have completed over 50% of your daily activity goal.

Tip:

Avoid ad-hoc meetings and other distractions until reps have made progress against their daily goal, such as making 10 calls before a 9am coffee break or only allowing meetings to be scheduled after 2pm.

1 - 2:30pm Double touches (15 DTs = 30 touches)	In your final block of dedicated prospecting time, you must complete your daily activity goals. Don;t take another break until you have.
2:30pm Break	
3 - 4pm Meeting hour (I am available for meetings)	Work with your manager to establish a rule with your organization that you will only be available for internal meetings during a dedicated time that won't distract you from prospecting. Ideally this occurs during none-ideal calling hours.
4 - 5pm Next day prep	Use your final hour of the day to set yourself up for success the next. This may include list building, buyer research and crafting new messaging.

Tip:

End each day prepping for tomorrow and set aside 30 min a day to learn something new.

Time management (cont'd)

The best time of day for calling

LeadResponseManagement.org conducted an excellent study (using InsideSales.com data) on the timing of outbound calls. The study is full of great insights to help you build your daily schedule, but here's a choice nugget:

4 to 6pm is the best time to call to make contact with a lead – 114% better than calling at 11 to 12am.
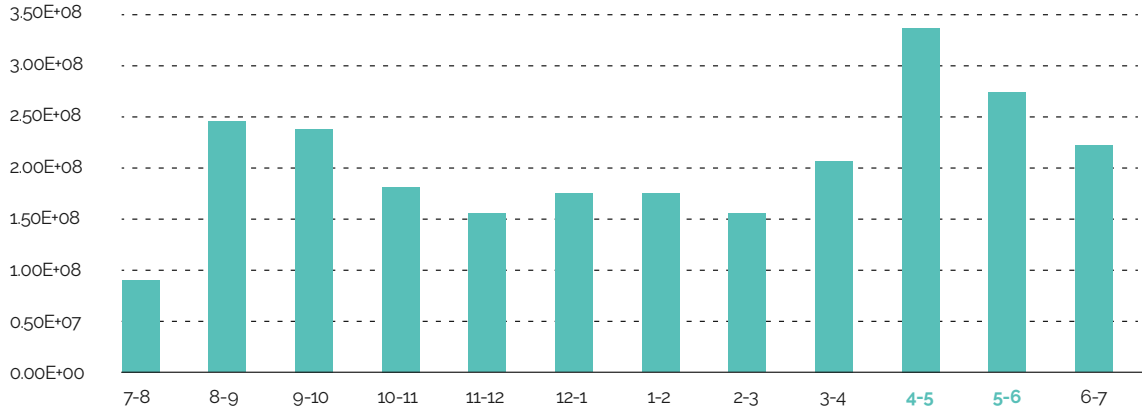
You'll see different data for different companies, but remember: the time zone of the prospect is what matters – your 4pm isn't always theirs!

! **Tip:**

Setting up custom reports or dashboards in Salesforce can help support the management of your daily schedules.

Time of day: initial dials to leads that become contacted

Source: Insidesales.com

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Team structure

Deciding how many accounts each SDR can handle and how they're deployed and managed is an important part of your ABSD strategy – but there are no fixed answers here. Your structure will depend on your goals, deal sizes and AE capacity.

> (!) The average ratio is 1 SDR to 2.5 Account Executives. This ratio is down sharply from previous reports. As recently as 2014 the ratio was 1:3.9.

In a recent TOPO study, the ratio varies by company size, with larger companies having more AEs per SDR (likely because larger companies focus more on profitability than growth at any cost):

Ratios of SDRS to sales reps for companies under $25m in revenue

Average: 1 to 2.1

1 to 1	1 to 2	1 to 3	1 to 4-5	1 to 6
50.0%	23.5%	17.6%	3.0%	5.9%
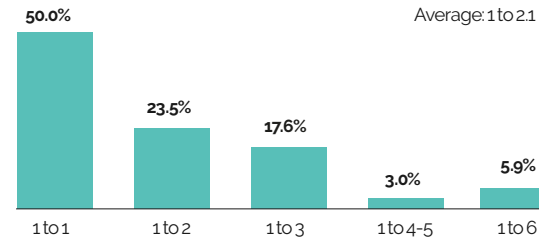
Ratios of SDRS to sales reps for companies over $25m in revenue

Average: 1 to 4.4

1 to 1	1 to 2	1 to 3	1 to 4-5	1 to 6
0.0%	15.8%	26.3%	42.1%	15.8%
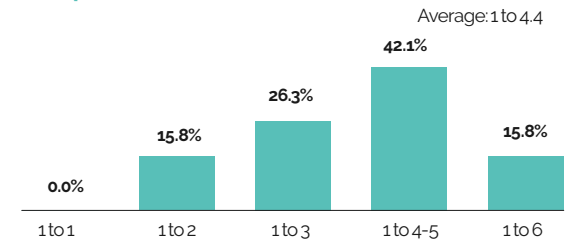
Source: TOPO Sales Development Benchmark Report (February 2015)

Another study by The Bridge Group shows a similar split:

SDR-to-AE ratio (SaaS vs. Non-Saas)
Number of AEs supported by a single SDR

| Less than $5M	$5-19M	$20-99M	$100M+
1.7	2.3	2.6	3.4
1.5	1.9	2.5	
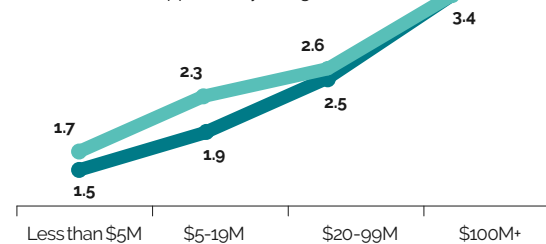
Source: Bridge Group 2016 benchmarks

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Reps to manager ratio

Most SDR teams have a fairly flat structure, with each manager leading 6-10 SDRs (the Bridge Group reports that the average ratio is 1:8.1, while TOPO sees an average 1:8.7 ratio). A lower ratio doesn't mean better performance – the same Bridge Group report found no relationship between SDR to manager ratio and Pipeline Performance.

Interestingly, the Bridge Group did that SDR teams directly led by "managers" achieved 8% higher PPS than those with "directors" or "vice presidents" in first-line leadership roles. This is likely because managers have more time to directly manage their SDRs, as opposed to leaders with broader scope of responsibility.

Number of SDRS to managers
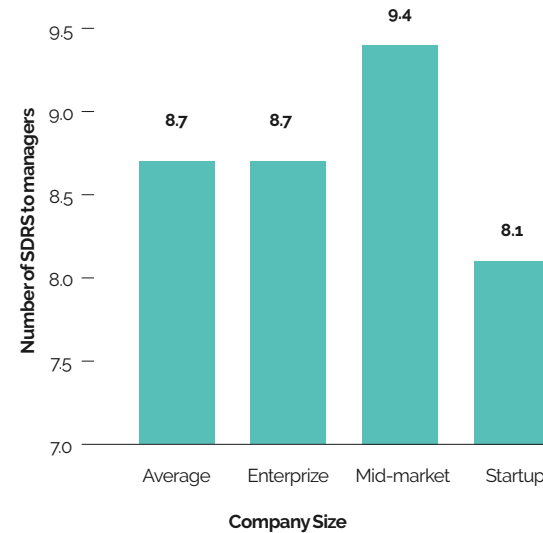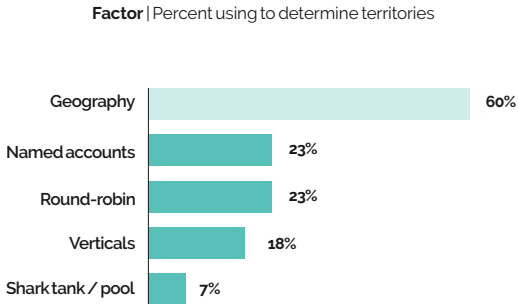

TOPO: The 2016 Sales Development Benchmark Report
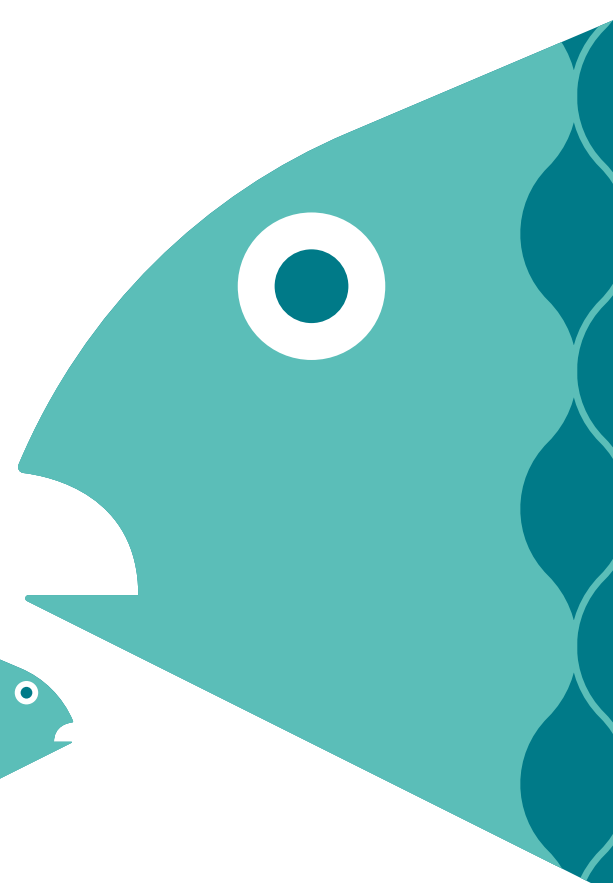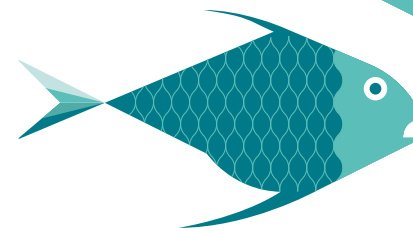
Territories and multiple locations

Assigning your SDRs to accounts is another strategic decision that will be guided by the unique dynamics of your situation.

Assigning SDRs to territories (rather than specific AEs) seems to be the dominant method, as this Bridge Group data shows, but more and more companies are experimenting with other options (such as named accounts) to deal with the fact that opportunities are rarely equally distributed across territories.

How territories are built

Factor | Percent using to determine territories

Factor	Percent
Geography	60%
Named accounts	23%
Round-robin	23%
Verticals	18%
Shark tank / pool	7%

Source: Bridge Group

The round robin or pool approach tends to apply more to inbound teams than to outbound ABSD.

Multiple locations

Many companies run their SDR teams from several locations – due to acquisitions and /or to the difficulty or expense of hiring all SDRs at headquarters. Secondary locations tend to be in lower-cost areas that have access to educated talent; The Bridge Group says the most popular are Arizona, Colorado, Georgia, North Carolina, and Utah.

Pros of multiple locations

- Increases the hiring pool
- Can hire in lower cost locations
- Maintain continuity of existing teams
- Can foster healthy competition
- Natural A/B testing to improve overall performance

Cons of multiple locations

- Challenges with collaboration
- Possible retention issues in isolated teams
- Risk of culture split
- Less clear or more complex career pathing

As with many ABSD issues, you can make it work either way – as long as you apply best-practice hiring, onboarding, training and coaching.

> 37% of groups have reps in the same role working in different locations.
>
> The Bridge Group: Sales Development 2016: Metrics and Compensation Research Report

Part 12

ABSD metrics

ABSD metrics

So how do you measure the success of your ABSD efforts – and track the indicators that keep you on track? A systematic approach to metrics is the answer. But you can't just apply typical metrics from the traditional, lead-centric demand-gen world.

Why ABSD metrics are different
ABSD metrics are different for these reasons:

- They track accounts not leads
- They focus on quality not quantity
- They track impact and influence more than try to apportion 'credit' (the ABE world is much more of a team effort)

TOPO identifies two categories of metrics that are most relevant to outbound ABSD (a third, conversion metrics, are more suited to Inbound models):

Activity based metrics – number of calls, emails, contacts over a period of time; coverage of accounts, etc

Outcome based metrics – the pipeline and revenue numbers generated by SDRs

Let's take a look at these:

"The value of a sales development effort is measured by increased won business per Account Executive and/or accelerated new customer acquisition."

Trish Bertuzzi
The Sales Development,
Playbook

Activity-based metrics

Activity-based metrics answer the question, "Are my reps doing enough of the right things?" How you define 'the right things' will reflect your own SDR playbook but they'll be the things you train and coach. Things like:

Task completion – are they keeping up to date on tasks or falling behind? (ABSD software like Engagio manages tasks and tracks task completion – just sayin')

Dials, emails or contacts per day – you'll set your own targets based on the daily schedule but remember: highly personalized emails and conversations do take longer than templated ones (and they're worth it)

Account coverage – if your SDRs are responsible for building contacts or mapping accounts, you can track their progress on this front

Tip:

It takes 12.73 dials to get a connect when calling direct phone numbers and 18.83 when calling switchboard numbers.
TOPO

"In the old days, we might have simply tracked, say, 300 dials a day. Today, it might be a fair amount of dials but also 10-12 emails, or 20 conversations a day."

Chad Burmeister
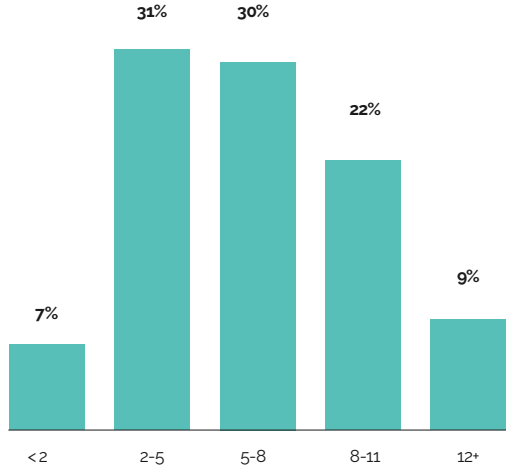Sr. Director, Sales Development,
RingCentral

Dials-to-conversations – similar to dial-to-connects but an even higher bar

Tip:

The industry average is 22.5 dials to one meaningful conversation, but if you're calling highly solicited divisions, such as IT or Marketing, or very senior executives, the ratio is closer to 30:1.
TOPO

Activity-based metrics (cont'd)

Meaningful conversations – according to Trish Bertuzzi, if you're only going to track one metric, track this

Conversation to appointment – measuring the quality of conversations

Tip:

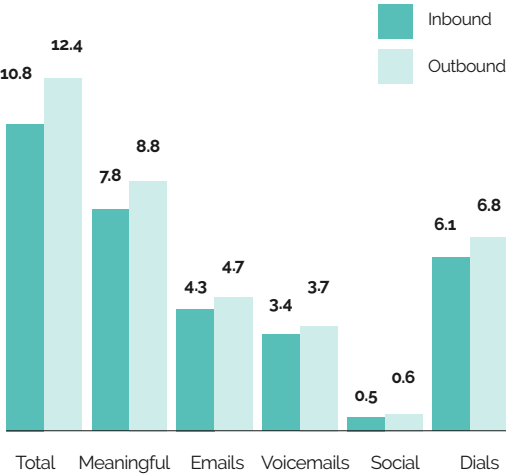On average it takes 3 meaningful conversations to get 1 appointment.
TOPO

Conversations per rep per day

Source: Bridge Group

Average number of touches and SDR puts on a lead - Inbound vs Outbound

Source: TOPO

Outcome-based metrics

Activities are all very important – but only if they generate the outcomes you need. So you need to track that too. Outcome-based metrics include:

'Accounts accepted' rate – a pipeline metric often measured per thousand accounts prospected, as in this Bridge Group benchmark:
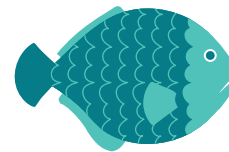
Bridge group outbound index

Q1-2013	Q2-2013	Q3-2013	Q4-2013	Q1-2014	Q2-2014
30	36	35	35	31	33
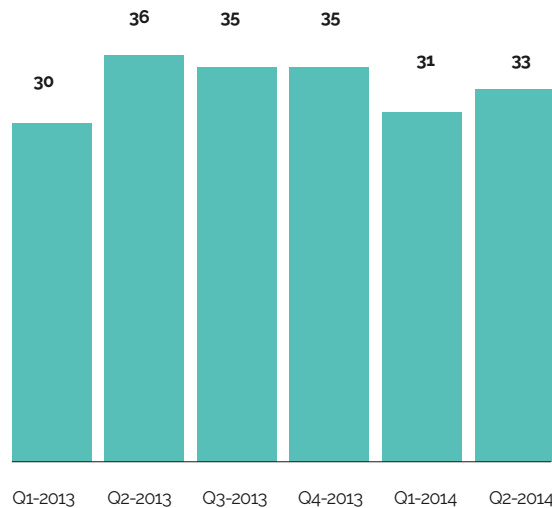
Note, however, that this metric should be significantly higher for ABSD than the average.

Pipeline created – the number and value of meetings and/or opportunities created for AEs

Revenue generated – the mother of all metrics: the value of closed deals initiated by SDRs

Three big metrics that Zenefits tracks:
1) Account to opportunity conversion – essentially the effectiveness of the SDR on a per account basis. We often celebrate the high volume opportunity creators in the SDR world, but how many accounts did they have to work through to get there?

2) Meetings held per week – Much more important than meetings set and a metric that a lot of organizations get wrong.

3) Opportunity to close ratio – this tells you if the SDR, Sales, and Marketing teams are aligned.

Robby Allen, Director of Sales Development, Zenefits

Outcome-based metrics (cont'd)
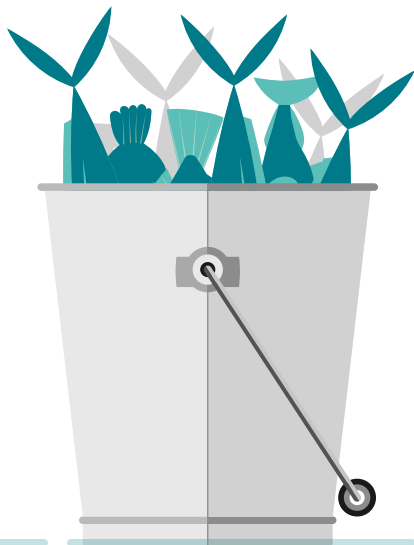
Bridge Group's ABSD Waterfall
The Bridge Group "Outbound Index" suggests tracking Reach, Pass and Pipeline:

- **Reach** the percent of accounts that engage in a conversation
  Reflecting quality of data and dials
- **Pass**: the percent of reached accounts passed to Sales
  Reflecting quality of contacts
- **Pipeline**: the percent of passed accounts converting to opportunities
  Often correlated to the number of contacts per account touched

Current benchmarks (though once again, ABSD metrics should be higher):
REACH RATE now sits at nearly 39.6%
PASS RATE now sits at 11.4%.
PIPELINE RATE now sits at 73.5% passing to Sales.

Marketing Qualified Accounts (MQAs)
While traditional demand gen looks at Marketing Qualified Leads (MQLs), an Account Based model looks at Marketing Qualified Accounts:

An MQA is a target account (or discrete buying center) that has reached a sufficient level of engagement to indicate possible sales readiness.

The idea of a handover from Marketing to Sales is more relevant to an inbound model. But we thought you might wonder why you're not seeing MQLs in this Metrics section!

Q&A

Steven Broudy, Head of Account Development, Americas, MuleSoft

Are there any important metrics that are overlooked by ABSD teams?

The metric that often gets overlooked is the success of a SDR at proactively going outbound to create and close qualified opportunities within a list of named priority accounts.

To do this you need a high level of process orchestration across functions, such as:

- Collaboration with the broader account team in order to decide on which accounts an SDR will prioritize
- Having fields in your CRM that track which named accounts an SDR owns, and which he or she is prioritizing
- Reporting out on SDR activity, pipeline creation, and opportunity win rates within these accounts

Most importantly you need to create and foster a culture of accountability – one that aligns the entire account team in the effort to drive revenue within this account base.

Why is it so important that Marketing and Sales Development work together throughout the buying process?

As a sales development leader, it's important to recognize that your organization serves as a critical lynchpin between Sales and Marketing.

It's therefore of the utmost importance to have visibility looking both backwards, into Marketing's demand generation efforts, and forward, into the entire sales pipeline.

Conversion rates at every stage of the sales and marketing funnel need to be proactively monitored to detect issues with the pipeline.

Above all, it's critical to ensure that a reciprocal feedback loop exists across Marketing, Sales Development and Sales.

Why is some degree of automation important in outbound sales development?

At MuleSoft, we've made a massive investment in building a team of A-players who inspire each other to win.

Given our dedication to keeping that team happy, challenged and engaged, it's critical to eliminate as much of the repetitive work typically associated with daily sales development tasks as possible.

Some degree of automation, while still enabling a high level of personalization (at scale), empowers an SDR to focus not on the menial work often associated with the role, but instead on driving highly-qualified opportunities.

Those are the opportunities that help drive business transformation for our prospects and customers – and they're more rewarding for the Sales teams to work on. It's a win-win situation.

SDR tools and technology

SDR tools and technology

Increasingly hard-to-reach buyers combined with the rising demands on the sales development team mean it's becoming essential to streamline, automate and accelerate the SDR function. Manual processes just can't scale to meet the need. This is a job for technology.

This section introduces you to the kinds of tools and technologies that are available to make the SDR job more efficient and effective.

Fortunately, there are a lot out there.

We organized the ABSD tech universe into three big buckets:

Core Sales Development Tools – the essential accelerators

Infrastructure Tools – the foundation ABM layer

Added ABM Tools – for filling out your stack

Let's take them one at a time.

"When it comes to SDR technology, you want Iron Man, not Terminator. Technology is there to make a good salesperson better… not to take the human out of the equation."

Matt Amundson
Vice President –
Sales Development
& Field Marketing,
EverString

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Core sales development tools

Covering the Who, What and Where of ABSD:

Who:

Data vendors
To identify and prioritize target accounts, find accurate contact data, and maintain data quality.

Example vendors: *Dun & Bradstreet, Leadspace, DiscoverOrg, Email Hunter, Norbert, Datanyze, LeadGenius…*

What:

Account insight
To understand account and market dynamics and find relevant issues that will resonate in target accounts.

Example vendors: *LinkedIn, InsideView, Mattermark, DataFox, Owler…*

What:

Person insight
To help research individual prospects and customers to tailor your messaging.

Example vendors: *LinkedIn, Crystal, Accompany, Triggerfox, CharlieApp…*

Where:

Human email/sales email
To streamline and automate the creation, sending, and tracking of highly relevant emails – ideally emails that are personalized, reviewed, and human-to-human.

Example vendors:
Engagio, Outreach, SalesLoft, ToutApp, Yesware…

Where:

Phone/dialer
To increase efficiency and improve the quality and consistency of phone and voicemail interactions.

Example vendors: *InsideSales.com, FrontSpin, RingDNA, Ring.io, Velocify…*

Where:

Social media
To monitor and interact with prospects and customers via social channels.

Example vendors: *LinkedIn, Twitter, rFactr, Nudge…*

Where:

Orchestration
To synchronize interactions that span channels (email + phone + social + demand gen) and departments (Marketing, Sales Development, Sales, and Customer Success) into coordinated multi-step Plays.

Example vendors: *Engagio (Yep – just us!)*

"Orchestration is the big step – the leap from old-school sales development to the new Account Based Sales Development."

Kristina McMillan,
Sales Development
Practice Leader,
TOPO

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Infrastructure tools

Beyond the core sales development technologies, there are additional tools that are essential for any account based strategy:

Lead-to-account matching
To match leads to the right target account, tie their activity to the right company, route them to the right owner, and get credit for the campaigns that touch them.

Example vendors: *Engagio, LeanData…*

Account based analytics
To understand which accounts have the best engagement and opportunity for growth (tracking MQAs), optimize SDR performance, and measure which marketing investments best reach target accounts and accelerate deals.

Example vendors: *Engagio, ZenIQ…*
(plus BrightFunnel and Bizible for attribution-based analytics)

Account planning
To map accounts, track account information, and manage account strategies.

Example vendors: *Altify, Revegy, manual…*

CRM
To manage accounts, contacts, opportunities, and so much more…

Example vendors: *Salesforce, Microsoft Dynamics, Oracle, SugarCRM, Hubspot…*

Added tools for account based marketing

In addition to the core tools, there are lots of tools that can accelerate your broader ABM initiative even further. Together with the sales tools, these make up the core elements of an Account Based Everything stack.

Who:

Predictive analytics

To identify and score potential accounts based on likelihood to convert.

Example vendors: *6Sense, EverString, Infer, Lattice Engines, Mintigo, Radius…*

Who:

Intent & technographics

To improve account selection with advanced data.

Example vendors: *Bombora, BuiltWith, Datanyze, Ghostery, HG Data…*

Added tools for account based marketing (cont'd)

Where:

Account advertising

To run account-targeted display ads to build awareness in specific accounts and support the sales development and deal processes.

Example vendors: *Demandbase, Terminus, LinkedIn, Madison Logic…*

Where:

Website personalization

To customize your website experience for specific accounts and industries.

Example vendors: *Demandbase, Evergage, Marketo, Triblio…*

Where:

Direct & dimensional mail/physical

To send packages, hand written letters, and other items to key people at target accounts.

Example vendors: *PFL, Bond… (this can also be done manually with checklists, mail houses, etc.)*

Sales development technology maturity

When it comes to technology for sales development, TOPO identifies three levels of maturity and reflects the usage levels for each:

Top level	Technology	Current usage
Level 1 (Foundational)	CRM	100 %
	Linkedin	100%
	Sales email applications	97.7%
	Contact data	83.7%
Level 2 (Growth)	Marketing automation	61.5%
	Dialing automation	49.6%
Level 3 (Optimze)	Gamification	29%
	Reporting and analytics	28.1%
	Predictive analytics	15.0%

Source: TOPO SDR Benchmarks

Account Based Everything market map

Who: Selection

Data Vendors
dun & bradstreet
leadspace
salesforce data.com
REACHFORCE
zoominfo
Datanyze
DiscoverOrg
Norbert
Email Hunter
leadGenius
EMAILBREAKER
ABERDEEN GROUP
SOCIAL123
Oceanos
B2BSignals
leadiro
toOfr

Predictive
6sense
EVERSTRING
infer
Lattice
leadspace
MINTIGO
RADIUS

Intent and Technographics
bombora
the B2B data standard
mrp
THE BIG WILLOW
Datanyze
HG DATA
Ridiculously Unfair Advantage
built with
siftery
GHOSTERY

What: Insights

Account Insight
Linked in
dun & bradstreet
mattermark
PitchBook
AVENTION
crunchbase
RAINKING
Sales Intelligence Realized
LEADBRIDGE
BAO
InsideView
Owler
xiQ
DataFox
compile
Clearbit
iDatalabs
ContextSmith
agent

Person Insight
Linked in
Crystal
ACCOMPANY
LEADGNOME
charlie
Spiderbook
TalentIQ
FullContact
Triggerfox

Where: Interaction

Ads
DEMANDBASE
Terminus
Linked in
MADISON LOGIC
vendemore
Azalead
kwanzoo?

Human Email
Engagio
SalesLoft
toutapp
Sidekick
outreach
PersistIQ
Yesware
salesforceIQ

Website
DEMANDBASE
evergage
GETSMARTCONTENT
Marketo
Optimizely
Triblio
YesPath

Direct/Physical
PFL
BOND
CoffeeSender
POSTMATES

Phone/Dialer
insidesales
twilio
FrontSpin
NEWVOICEMEDIA
ringDNA
ring.io
Velocify
Fastcall

Events
cvent
Attend
Eventbrite

Other
integrate
FREYA NEWS
momentum
ACCOUNT BASED MARKETING

Social
Linked in
PEOPLELINX
Hootsuite
nudge
Factr
influitive

Orchestration
Synchronize Interactions into coordinated Plays
Engagio
Marketo
eloqua
HubSpot
salesforce pardot
Terminus
Complementary

Infrastructure
Lead to Account match (L2A);
Routing; ABM Analytics
Engagio
Marketo
LeanData
zenIQ

Attribution
brightfunnel
bizible

Account Planning
ALTIFY
Revegy

CRM
salesforce
HubSpot
Microsoft Dynamics
ORACLE
CRM ON DEMAND

Conclusion: an idea whose time has come

Conclusion:
the new growth rocket

Part 14
Conclusion:
an idea whose
time has come

**Generating revenue is the most important activity in every company.
Every single job across the business depends on you doing yours.**

Over the last decade, the way companies like yours attacked the revenue generation challenge has changed dramatically. But all that was just a prelude to the next big leap waiting for you:

Account Based Sales Development is not just the engine of the Account Based Everything model that's sweeping through B2B: it's the engine of a kind of hyper-growth that very few companies have ever experienced.

Get this right and the rest of your career is on a similar trajectory: the sky's the limit.

No, it's not an easy path. There's a lot to get wrong and more than a few mis-steps along the way (real transformation is never smooth). But if you follow the principles and best practices summarized in this guide, we're *convinced* you will succeed, just as the pioneers of ABSD have succeeded before you.

Best of all: this journey is also hugely rewarding on a personal level. The colleagues whose lives you'll touch (in Sales, Marketing and beyond) and the SDRs whose careers you'll launch will find this new approach far more gratifying than the old-school, volume-driven grind. It's faster, it's more successful and it's easy to feel the difference from day one.

In short: this is going to be amazing.

Onward and upward!

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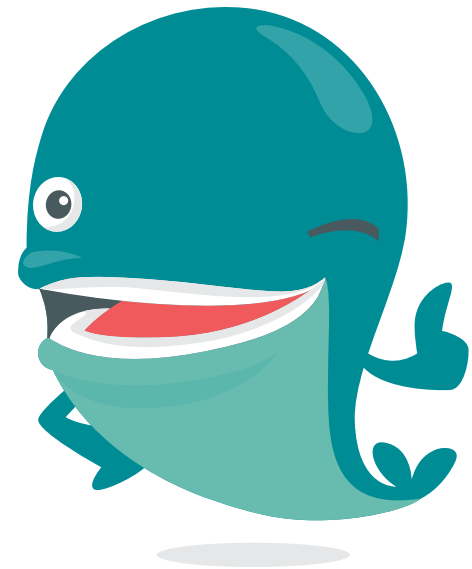
About Engagio

Engagio PlayMaker lets you design and orchestrate multi-step Plays that span channels (email + phone + social + demand gen) and departments (Marketing, Sales Development, Sales, and Customer Success) to engage target accounts with the human touch.

It supports multi-threaded, Account Based Plays, coordinating communications from everyone on your team to everyone at the target account.

Unlike other sales email tools, PlayMaker emails are personalized, reviewed, and sent by a human to drive more meaningful connections. So you don't risk your relationships with key people at important accounts by sending them generic, automated emails.

PlayMaker assigns and tracks Tasks, making sure everyone is coordinated, Sales and Marketing stay aligned, and no one falls behind on their activities. What's not to love about that?

Engagio Scout puts account insights (every email, meeting, and interaction and more) at the SDR's fingertips when they're reaching out to accounts so every interaction is more relevant.

The result: fully-orchestrated and streamlined Plays that take you deep into target accounts – and prove it.

Shouldn't we be talking?
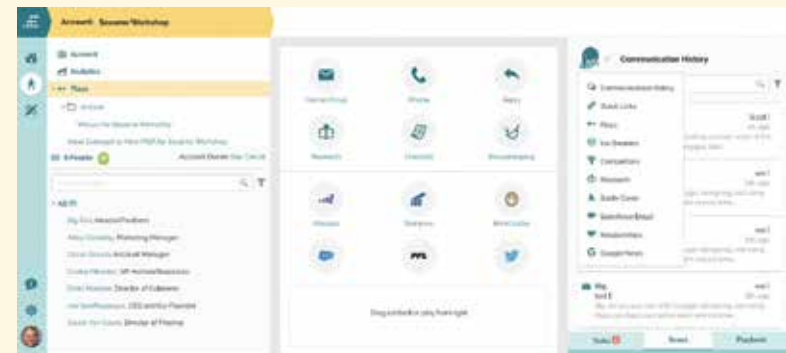
An Engagio screen – just to make you beg for that demo.

Thank you!

Big thanks to the people who helped us shape this book by generously sharing their time and expertise. You guys rock.

Craig Rosenberg
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Chad Burmeister
Lars Nilsson
Matt Amundson
Kristina McMillan
Tom Scearce
Scott Gaydos
Steven Broudy
Robby Allen

Special Thanks

To the two analyst firms who do so much to help Sales and Marketing leaders make better decisions:

The Bridge Group
Specialists in building, expanding, and optimizing inside sales strategies for B2B companies, including the big decisions around implementation strategy, process, tactics, technology, and tools.

TOPO Research
A research and advisory firm that helps sales and marketing professionals adopt the patterns, behaviors, and Plays that drive exceptional growth.
Both are amazing resources for anyone who cares about selling.

Books

From Impossible to Inevitable,
Aaron Ross, Jason Lemkin

Predictable Revenue,
Aaron Ross, Marylou Tyler

The Sales Development Playbook,
Trish Bertuzzi

The Clear & Complete Guide to Account Based Marketing,
Engagio

Sales Manager Survival Guide,
David Brock

Whale Hunting with Global Accounts,
Barbara Weaver Smith

Experts

Account Based Everything and the new Sales Development discipline didn't just happen. They were generated from the front-line experiences of the world's most progressive sales and marketing leaders - and from the guidance of some of the world's smartest analysts.

Follow these people!

Account Based Everything

Anthony Kennada Gainsight
Barbara Weaver Smith The Whale Hunters
Carlos Hidalgo ANNUITAS
Craig Rosenberg TOPO
David Raab Raab Associates
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