How we scaled this

Prospecting with sales development

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SCALE

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Summary

GTM organizations recognize the importance of the Sales Development function, but often fail to provide the resources and support SDRs need to be successful. This is especially true in startups and growing companies moving at breakneck speed. Feeling pressed for time, GTM leaders often fall short when it comes to establishing a reliable, consistent foundation for SDR outbound success.

As a result, their Sales Development teams harness a haphazard approach and find themselves hampered by inconsistent efforts that don't yield desired results. **No wonder 57% of sales leaders say their top challenge is not enough pipeline**, according to TOPO (now Gartner).

That was the situation facing a team of 14 SDRs at a $250M HR Saas platform company. The team grew organically over a period of two years, but lacked knowledge of sales development strategy. As a result, the team was pulled in many directions, often asked to start and stop different tasks and campaigns before they were completed. Feeling that sales development wasn't working for them, management considered scrapping the function altogether.

Fortunately, they called upon our expertise for putting in place a methodical approach grounded in a shared and deep understanding of buyers and an effective and proven prospecting framework.

About the author

Kristina McMillan is the co-founder of Argyle Earth and the former VP of Sales Practice at Gartner. She is a recognized thought leader on topics such as sales development, innovative pipeline strategies, sales and marketing technology, and lead generation. At TOPO, Kristina published over 100 industry-leading research papers on the strategies, benchmarks, and best practices of high-growth sales and marketing organizations. As a GTM Advisor for Scale, Kristina supports companies on pipeline generation and sales development strategies.

She has worked with hundreds of sales and marketing organizations to assess and optimize pipeline health. Those engagements with early-stage startups to large tech brands include Google, LinkedIn, HP, Oracle, Microsoft, Ring Central, ServiceNow, ZoomInfo, Coupa, Zendesk, SalesLoft, and Outreach.

Overview and results

Challenge

Sales reps struggle to prospect

Inbound leads are not properly followed up on to ensure sufficient conversion

Outbound prospecting requires consistent, frequent touches to generate responses.

Solution

Prospecting campaigns plans provide the structure to ensure consistent execution

Targeted, personalized email templates help reps execute faster

Debrief and re-run campaign to another set of leads/accounts

Results

2x outbound prospecting campaigns executed per month to 35–40 prospects each; increasing response rates by 6–10%

Ongoing inbound follow-up campaigns ensure 10–12 touches per lead; response rate of 12–18%

Target
Mid-Market, Enterprise

Product
SaaS Solutions

ACV
$50–250K

12-18%
increased response rates by ongoing inbound campaigns

6–10%
increased response rates by outbound prospecting campaigns

Establish prospecting process

Ongoing pipeline health requires consistent prospecting so we needed a process and expectations for prospecting based on Ideal Customer Profile/persona and established criteria for a qualified lead (see example below).

Qualify: Establish criteria for what qualified looks like

CRITERIA	KEY QUESTIONS	SCRIPT
Authority		
Confirm whether the prospect is the right person based on your target personas	What is your role? How are purchasing decisions made in your organization for a solution like this? Who else is involved in making a decision for a solution like this?	Normally when we work with our customers on this there are other folks in the organization that get involved in the evaluation process, such as *<insert roles>*... does that align with your process as well? Who are those individuals in your organization?
Need		
Confirm whether the prospect has a specific need addressed by your solution	What are the two or three challenges facing your organization right now that led us to this conversation? How long has this been a problem? Why are you looking to address it now? What are the consequences of the problem remaining unsolved?	Our customers typically come to us to help address a couple of challenges *<insert 2–3 role-specific challenges>* How does that resonate with you?
Timeframe		
Confirm whether the prospect intends to act within a reasonable timeframe	How important is it to you/your organization to resolve this? What's the best-case scenario for when you would expect to address the problem?	Customers who work with us typically implement by *<insert typical steps and timeframe>* How does that align with your organization?

How we did it

We met with SDR leadership (Director and frontline managers, 2–3 of the best SDRs, product marketing or demand gen for messaging, and RevOps for process. The goal of the discussion was agreement on the process steps, stages, and expectations for the SDR role.

	TARGET	RESEARCH	ENGAGE	QUALIFY
Objective	Determine who to reach out to	Develop relevant messaging for the prospect	Execute outreach activities to prospect	Determine fit between prospect and solution
Key tools	ICP Target account list	Research checklist Customer stories	Engagement plan Email templates	Qualification definition Handoff process (SDR-AE)
Exit criteria	Proceed if targets are identifies	Identify relevant pain points ("the hook") for the prospect	If contacted, proceed to qualification If no contact made, move to nurture	If qualified, move to pipeline If not qualified, move to nurture

SALES PIPELINE

What we did

The output of our discussion was the following:

Developed a one-page plan detailing the key steps in the SDR process, with a defined objective for each step.

Identified the tools we needed to create—research checklist, customer stories, and engagement plan—to support each step in the process.

Established the criteria that needed to be met before an SDR could proceed to subsequent steps.

Why it worked

Previous prospecting efforts were disorganized and ad hoc. **Clearly defining the expectations as a team gave the SDRs a "recipe to follow" that ensured success when followed consistently.** This helped the team navigate the inevitable challenges that arise.

For example, when conversion rates dropped suddenly, a review of SDR activities showed that the team was executing touches consistently, according to the prospecting process, and therefore was not responsible for the sudden decline in response rate.

Further analysis showed that new content used in the prospecting process was less effective at generating responses from prospects. Rather than blaming the SDRs for not doing enough calling or emailing, we were able to swap out the content and increase the response rate.

Top tip

Model your new approach on the process that works for your top-performing SDRs.

Develop a campaign plan

The SDR team needed a consistent process for how to prospect.

How we did it

We led a 90-minute working session with SDR leadership and 1–2 SDRs to fill out the campaign plan and the supporting resources.

What we did

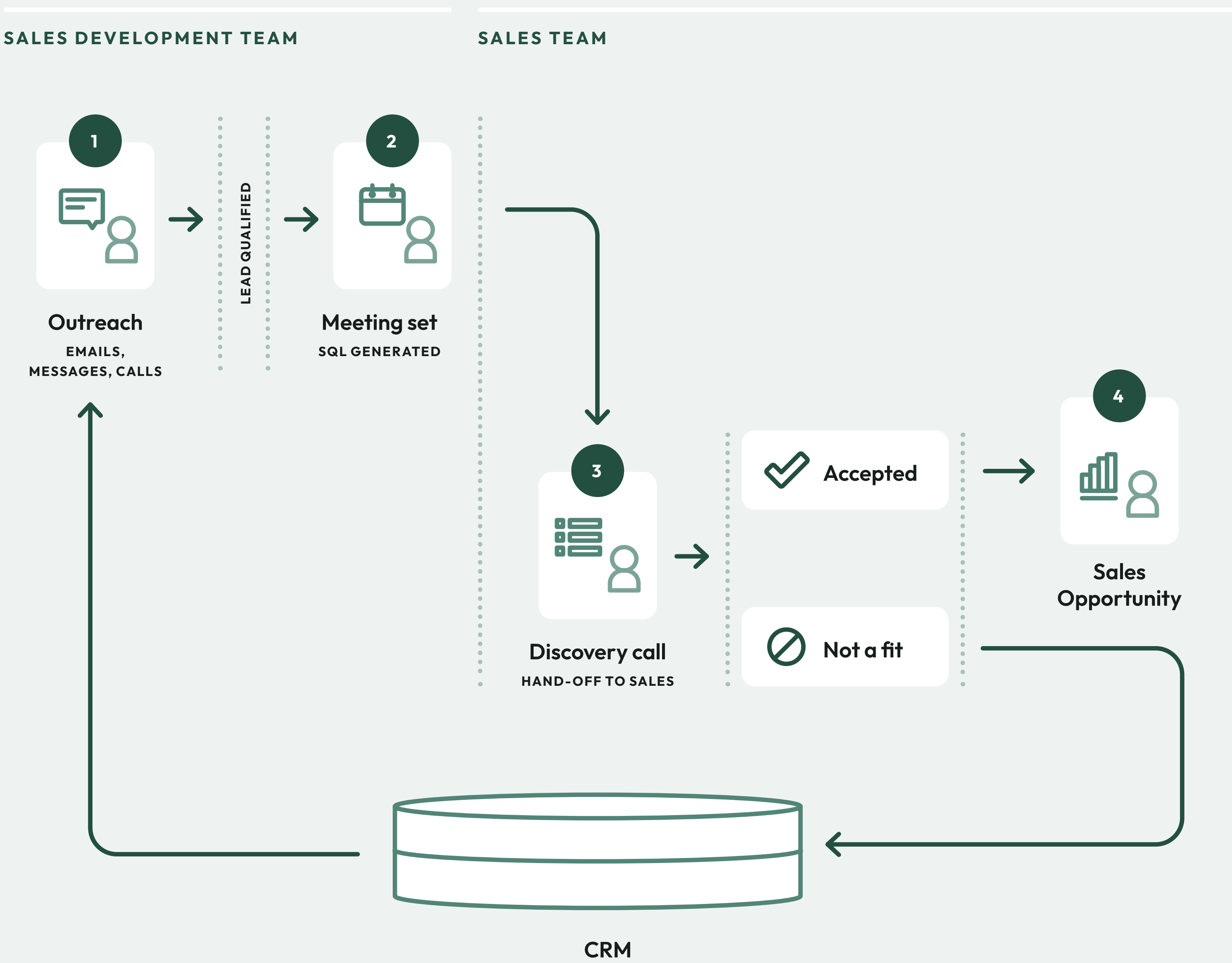
Developed an initial planning document that aligned the team around what a prospecting campaign looked like, expected activities, and templates.

Target	Financial services
Start date	November 9th
Campaign Duration	2 months (November & December)
Persona	Head of Analytics, Emerging Tech
Reference Customers	Paypal, American Express
Each Campaign Run will follow these guidelines:	
Messaging components	1. Product optimization 2. User analytics 3. Offer: demo
Channels	Email, phone, LinkedIn
Number of touches	10 (5 emails, 4 calls/voicemails, 1 InMail)
Duration	2 weeks

Campaign plan brief

FIRST RUN	SECOND RUN	THIRD RUN
Start	**Start**	**Start**
Nov 9th Pilot team to run 10 accounts	Nov 28th Expand to all sellers 10 accounts per Rep	Jan 12th Integrate marketing efforts to warm up accounts
Actions	**Actions**	**Actions**
(Prior to start) Find name and contact info for at least 1 persona at each account Complete run Assess responses (Nov 21st)	Complete run Assess against performance of 1st run Find names and contact info for next set of accounts	Begin as 2nd run is ramping down Compare performance with first and second runs Re-run against remaining accounts or develop new campaign

Qualify:
Set clear expectations for progressing leads



Why it worked

Most SDRs spread their efforts too thinly across accounts and leads, trying to touch as many as possible, with only 1–2 touches. This plan provided a prescribed set of activities based on best practices that ensured more meaningful engagement with prospects, yielding higher response rates.

Top tip

Have SDRs group their efforts by touch type to make execution easier (e.g., send 10 emails, then set up a call block to call those 10 prospects).

Develop email templates to support scalable execution

SDRs often make tradeoffs between creating quality messaging and executing scalably. For prospecting campaigns to yield the volume of pipeline needed for each SDR, it is essential for SDRs to identify scalable resources to support their prospecting efforts.

ENGAGEMENT PLAN

Day	Objective	Action
Prep	**Do research to identify relevant points for messaging**	Develop messaging/ Customize email templates
Day 1	**Start campaign with a customer story from a relevant industry**	Voicemail #1, Email #1, InMail #1
Day 2	**Follow up on previous message (fwd email #1)**	Email #2, Dial
Day 5	**Share a different peer use case story**	Voicemail #2, Email #3
Day 9	**Follow up on use case or share thought leadership content**	Email #4
Day 12	**One last try before moving on ("break-up email")**	Voicemail #3, Email #5
War Dial	**Call and try to reach live, but no VM**	Time permitting

How we did it

Defined a touch pattern methodology for how prospecting messaging should unfold over the course of the campaign.

What we did

Developed 5 email templates that followed this methodology:

Message 1	Provocative questions (identify three specific questions that can be answered/addressed with the solution)
Message 2	Forward first message
Message 3	Present first customer story
Message 4	Present second customer story
Message 5	Last attempt (end of campaign)

Why it worked

Developing messaging templates in advance helps **SDRs execute faster and ensure that messages are aligned to best practices.**

Top tip

Set the stage for enough touches (10–12) over a defined time frame, as most SDRs give up way too soon.

Debrief and re-run campaign

A quick debrief helps identify any tactics or messages that need to be updated, which you can then confirm with A/B testing.

How we did it

Campaign leadership team met weekly to discuss updates on campaigns in progress and to prepare for next campaign launch.

What we did

We created a campaign leadership team—composed of demand gen leadership, SDR leadership, 2–3 SDRs, 1–2 sellers, and sales leadership—to offer insights into what was/wasn't working and to generate new ideas for successive campaigns.

Leadership met weekly to discuss updates and prepare

Campaign leadership team offered insights for successive campaigns

Why it worked

Regular reporting and ideation on the campaigns **build stronger relationships between SDR and sales, and a joint ownership of pipeline generation.**

Top tip

Analyze all messages that elicited a response to understand which messages were more effective, not just those who responded positively.

Key takeaways

Many sales leaders think reps will resist more process but SDRs are usually grateful for a recipe for success, so anticipate less resistance than you have in mind.

A formal prospecting process is incredibly beneficial for onboarding. It distills the SDR role in a single visual, providing a powerful tool for setting SDRs on the path to success from the start.

SDRs appreciate a consistent, proven approach as it provides clarity—and instills confidence—on what effective execution looks like while eliminating the second guessing that comes with trying ad hoc approaches.

A prospecting process works best when integrated with apps designed to enable sales engagement — like Salesloft or Outreach — and content management, like Regie.ai.

Messaging is key to engagement yet new SDRs will struggle to distill their company's written messaging and materials into compelling, engaging messaging that works well in a conversational setting. It's far better to provide them approved, effective messaging grounded in a Problem → Solution → Result framework.

PROBLEM → SOLUTION → RESULT

This saves them from falling into the product/feature trap and instead yields a story narrative that speaks to each prospect in a personal, compelling way.

SCALE