SalesLoft

The SalesLoft Playbook for Managers

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Welcome, Sales Managers

You've got a lot on your plate. From hiring and ramping to motivating and coaching to selling and closing. As sales managers, you must do it all. So many responsibilities. So little time.

To help you lighten your load, and, most importantly, *help you and your team* crush your goals, we created this playbook just for you. This playbook will help you put SalesLoft to work - from driving team efficiency to providing the best possible buying experiences.

As a leader focused on results, you need actionable advice (not untested theory). So, here's our promise: this playbook will provide practical steps you can leverage to create a culture of success for your team.

Ready for results? Let's dive in.

Establish winning front line management practices

Let's discuss the tasks you need to complete as a winning front line sales manager. Below, we will help you set up a structure to manage and analyze your team on a daily, weekly, and quarterly basis. We'll review everything from check-ins to managerials tasks to time-based goals for your new sales reps.

Daily, weekly, and quarterly activities

In this section, we will suggest Sales Leader activities that should be driven on a consistent basis including team activity, cadence health and cadence maintenance. In general, cadence structures should be consistent over time except for when you're testing new or revised cadences. Following this section, we will cover cadence creation best practices.

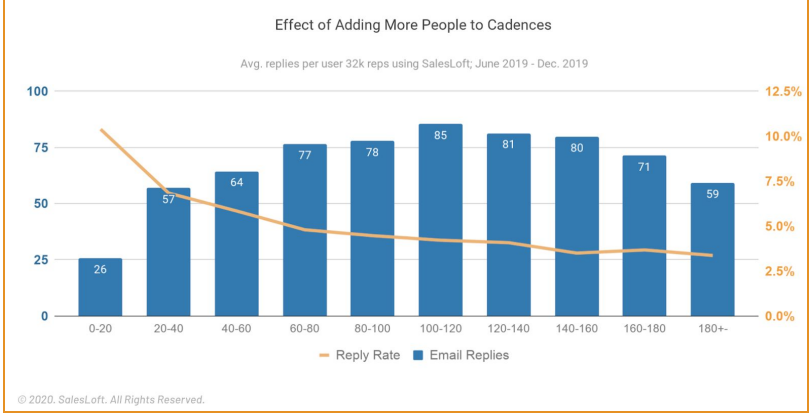
Daily Tasks

Set a few minutes on your calendar each day to review your metrics, most of which you can view using call and email reports directly in SalesLoft. These reports provide one-page overviews of your team's activity and the stats pertaining to each rep. Unless you notice patterns that warrant attention, you don't need to check in with your reps every time you view their metrics.

Daily KPIs SalesLoft adopters commonly use include:

1. **People Targets.** A key metric to help manage rep output is defining the number of net new contacts they should be adding into a cadence on a daily basis. The data shows that less is more if you want to see an increase in reply rate. The other thing to think about is how many manual steps they would need to execute with a full cadence. Mileage will vary, but you can find the right number by taking your daily activity goal, dividing it by the # of manual steps in the cadence, and you'll get the number you should add per day.

There are costs for adding too many people per day.



2. **Phone Calls.** Number of phone calls expected each day.
3. **Conversation Goals.** Tracks call outcomes.
    a. Connect Rate: How many times your reps are having conversations divided by the number of calls attempted.
    b. Positive Conversations: Ratio of connected calls resulting in a desired outcome.
4. **Email Sends.** Number of emails each rep sends per day.
5. **Ideal Reply Rate.** Number of email replies divided by total number of emails sent.

To see how many emails your reps sent and how many calls each rep logged, go to the Analytics page. Click the Team tab. Check out this eBook around tips for optimizing the B2B Sales emails.

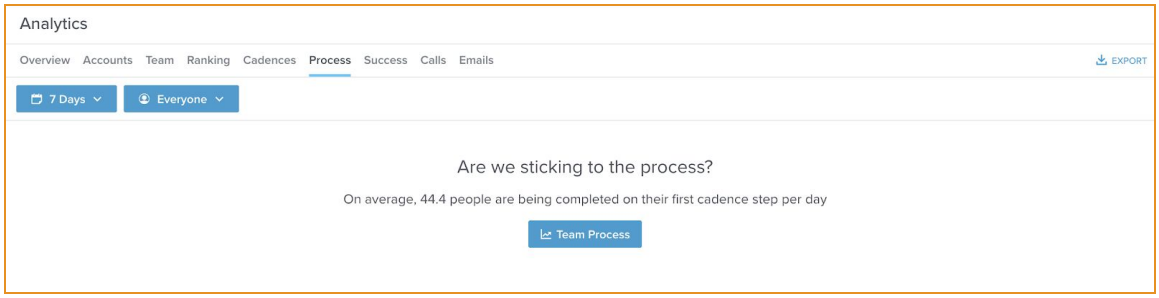
Analytics

Overview Accounts Team Ranking Cadences Process Success Calls Emails EXPORT

7 Days Everyone

NAME	TOTAL ACTIVITIES	ACTIVITIES PER DAY	SUCCESSES	MEETINGS	SENT	DELIVERED	BOUNCED
TOTAL - 62 REPS	2,591	370.1	2	145	2,565	2,556	9
Adam Waid	2	0.3	0	0	2	2	0
Alexander Glick	43	6.1	0	5	43	42	1
Amanda Holcombe	58	8.3	0	1	47	45	2
Andrea Caldwell	45	6.4	0	5	45	45	0

You may want to dive deeper. For example, are your reps adding the right amount of people to their cadences? Keeping the top of the funnel full will lead to more connections and conversions. To investigate, navigate to your Analytics page, click the Process tab, then click Team Process. Filter by the first column, Step 1 Daily Add. We'll talk about analytics in greater detail here.



Note - Salesforce users can take this analysis a step further by reporting on day 1 cadence steps completed by installing the Insights from SalesLoft Dashboard. Please reach out to your Professional Services Consultant or Customer Success Team for best practices on setting this up.

Weekly Tasks

Each week you need to be meeting individually with your team members and pulling reports to review their progress.

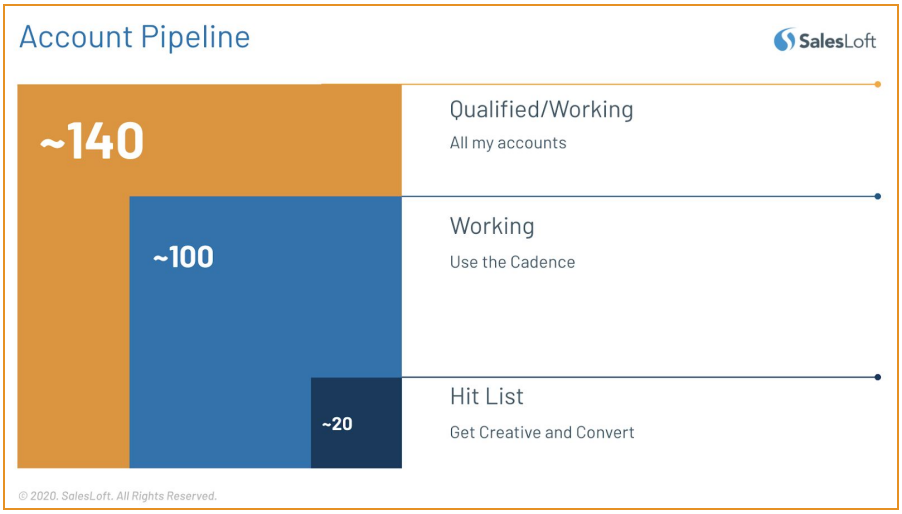
1:1 meetings

During your weekly meetings with reps, maximize coaching time by reviewing your predefined KPIs and cadences. Use this time to see how your rep is doing with the process. Then guide them if they're struggling or praise them for a job well done. These are your objectives:

- Set aside 30-45 minutes with each rep.
    - Review performance only.
    - Designate another time for skills coaching.
- For an Account Based strategy, confirm the rep is working no less than three leads per company.
    - Identify how many contacts the rep has in a cadence.
    - If you have Admin access you can filter by an individual's cadence take a look at the Progress column.
    - Breaking out your cadences is a great way to balance the work load. Too many contacts in a single cadence step creates bottlenecks. If the rep has

more than 20-25 contacts in a step, examine the situation more closely. Either the rep is behind on cadence steps, has skipped steps, or the cadence needs to be reworked for better effectiveness.

- The Cadence is what you use to move accounts to your "hot list". It is like prospecting pipeline review. You should be asking your reps: "Are you working 3 people in all your accounts?" - Yes
  "Then let's talk about the 20 on your hot list and figure out a way to get creative and convert".



Reporting

Pull and evaluate reports every week and use them to inform your coaching.

Recommended:

- Top Cadences by Reply
- Top Cadences by Opportunities Created
- Positive Connections
- Overdue Steps
- On Time Steps
- Skipped Steps

You should also use weekly reporting to assess how individual steps and cadences perform. Specifically, evaluate these metrics:

- Opens/Clicks/Views: Use these as success indicators for individual steps in a cadence.
- Opportunity Creation/Closing: If your team defines the Success button, you can use it to track opportunity creation and closed deals in SalesLoft. You can also use Salesforce reporting to determine which cadences result in opportunity creation from prospecting or closed lost cadences, as well as which active opportunity cadences produce closed deals.

If you aren't sure that your reps are using cadences, navigate to SalesLoft in-app analytics, click the Process tab, then click the Team Performance drill down and filter by Completed Steps.

Analytics / Process Report

5/2/2020 - 5/8/2020 | Everyone

NAME	PEOPLE ADDED	COMPLETED STEPS	ON TIME STEPS	% ON TIME STEPS	SKIPPED STEPS
TOTAL - 20 REPS	309	757	695	91.8%	4
Anna Scott	0	43	42	97.7%	0
Audrey Lewis	0	63	63	100.0%	0
Carlos Castillo	0	0	0	N/A	3
Cherrelle McCauley	0	19	19	100.0%	0

Reporting tools and support guides for reference

- Actions Forecast. Allows you to gauge your rep's workload. You can coach reps managing a high number of activities or motivate reps who seem to be falling behind in their tasks.
- Analytics tab. Provides insight into rep's activity and measures the effectiveness of your sales process. We'll dive into analytics more later.
- Account Analytics - Gives you an overview of the Account-based activity that has been completed by your team. Makes it quick and easy to see the most and least engaged Accounts through several data points.

- Your Process Analytics. Review the sections for On Time Steps and Skipped Steps to see how you can monitor these percentages.
- Are We Having Meaningful Conversations? Learn how SalesLoft helps you analyze rep phone performance.

You can easily track your team's KPIs through SalesLoft Analytics, which allows you to filter and export your metrics. Use these guides to learn more about SalesLoft Analytics' features:

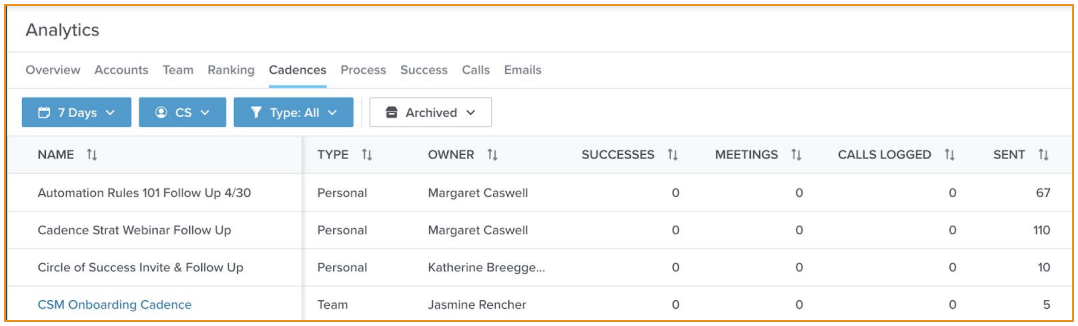
- Filter by SalesLoft User
- Filter by Time Range
- Export Analytics

Quarterly Tasks

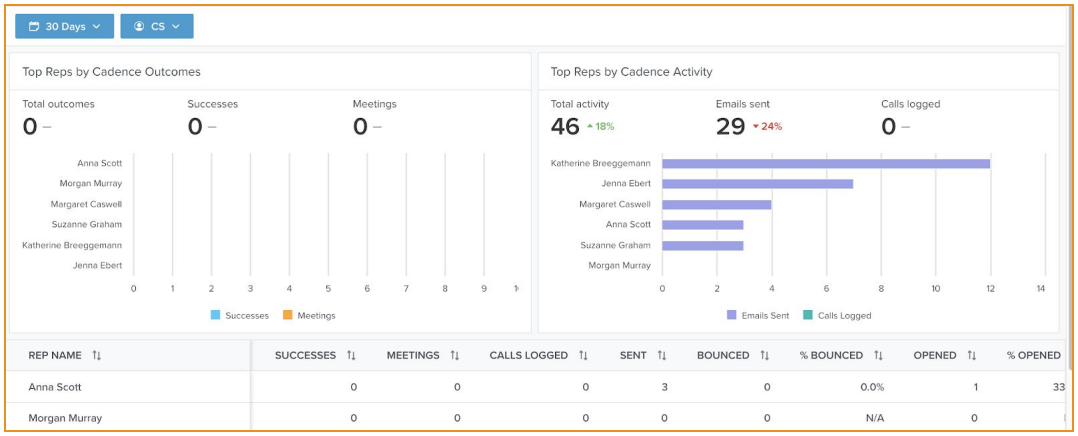
Each quarter you need to audit your content and cadences, as well as, perform cadence testing. For cadences and templates you will no longer use, be sure to archive them; this helps to keep your instance clean. Doing these activities arms your reps with current materials, ensuring a fresh and relevant approach to prospecting.

To easily check your top performing and lowest performing templates, navigate to your analytics, and click on the Email tab. You will see an overview for the templates with the highest engagement and lowest engagement.

For cadences, navigate to analytics click on the Cadences tab, and see which cadences either have the most Successes logged or Meetings booked. You might see some cadence names that are hyperlinked. These are Team Cadences; you have the ability to drill in for more data including the ability to see which rep is utilizing this team cadence the most and how successful the cadence is performing.



NAME	TYPE	OWNER	SUCCESSES	MEETINGS	CALLS LOGGED	SENT
Automation Rules 101 Follow Up 4/30	Personal	Margaret Caswell	0	0	0	67
Cadence Strat Webinar Follow Up	Personal	Margaret Caswell	0	0	0	110
Circle of Success Invite & Follow Up	Personal	Katherine Breegge...	0	0	0	10
CSM Onboarding Cadence	Team	Jasmine Rencher	0	0	0	5



Template content audit

While you strive to craft the perfect messaging and create the ideal processes, after time you'll find those templates and cadences aren't performing as well as they used to. That's why monthly audits are critical. Here's what to do monthly to keep your team's content fresh.

- Update templates and cadences for relevance: Check for low-performing templates. See if marketing or sales enablement has any new content or updated messaging you can incorporate.
    - Complete Team Cadences Guide
    - Complete Templates Guide
- Perform tag and naming convention cleanup: Are reps using relevant tags? Are there any tags they aren't using? Are all of the names clean, organized, and easy to follow?
    - Manage Tags
- Review Vidyard Messaging:
    - Have trends changed and are you highlighting the right aspects in your videos?

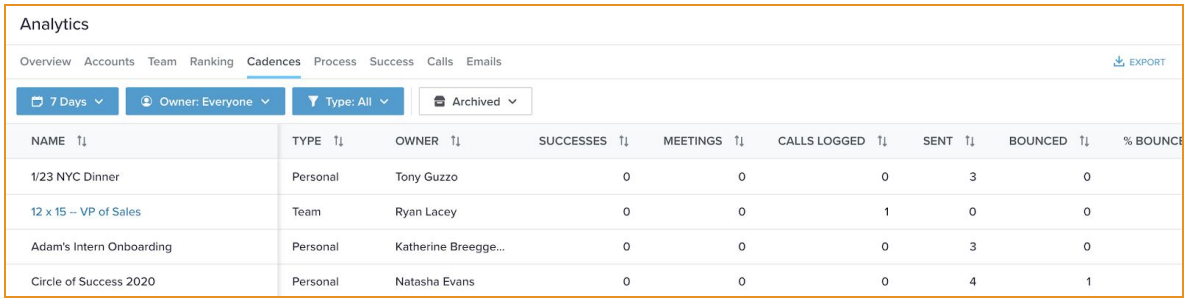
Cadence audit

Cadences create a systematic approach for your reps to follow. When reps are first starting, provide them with the same cadences and messaging. Team cadences make it easy to track the activities, messages, and overall processes.

With these cadences in place, conduct monthly check ins to track your reps' successes and pinpoint obstacles where they need more coaching.

The monthly check-in also helps you see which reps can graduate to creating their own cadences. After a rep begins their own cadence creation, the monthly check in should involve a complete content audit to ensure the rep's messaging generates sales success.

You can also check cadence performance using the Analytics page.



NAME	TYPE	OWNER	SUCCESSES	MEETINGS	CALLS LOGGED	SENT	BOUNCED	% BOUNCE
1/23 NYC Dinner	Personal	Tony Guzzo	0	0	0	3	0	
12 x 15 -- VP of Sales	Team	Ryan Lacey	0	0	1	0	0	
Adam's Intern Onboarding	Personal	Katherine Breegge...	0	0	0	3	0	
Circle of Success 2020	Personal	Natasha Evans	0	0	0	4	1	

Cadence testing

Testing is a fundamental piece of maintaining and refining cadences. Cadence owners should test content and/or structure every month. Consider A/B testing your cadences as well. Sales leaders, enablement, and sales ops should hold monthly cadence meetings to share testing results from the previous month and testing strategies for the coming month.

New hire onboarding

Ramping new hires is a critical responsibility for front line managers. Did you know that the number one reason a new SDR leaves before hitting the half-year mark is a lack of successful onboarding? So, let's discuss a plan to bring your new team members up to speed fast.

First, assign high-performing reps to mentor new hires. As a sales manager, you only have so much one-on-one time to give. Mentorship affords the daily attention to bridge that gap. So, delegate mentoring responsibility to team members you can trust.

Additionally, if your new hires are SDRs as opposed to AEs, they're likely new to the workforce. So, host a skill-building workshop each week to provide new reps the knowledge they need to succeed.

Below is a schedule of events for new SDRs in their first two weeks.

Day 1	Day 2	Day 3	Day 4	Day 5
Get familiar with the company	**Get familiar with the product**	→	→	→
Meet department leads	Attend an onboarding call	Attend an onboarding call	Training on 15five	Attend 2 AE demos
Learn about company culture	Attend 2 AE demos	Attend 2 AE demos	Read through social proof on blog	Read product one pagers

Day 6	Day 7	Day 8	Day 8	Day 10
Get familiar with the workflow	**Get familiar with data**	**Get familiar with prospecting**	**Get familiar with calls**	**Get familiar with the workflow**
Cold Calling 101 Training	Data training	Search for 200 prospects	Voicemail Drop Training	Finish prospecting
Complete a mock cold call	Target Audience Training	Set up first cadence and lead pass	Complete a mock cold call	Start *Predictable Revenue* report

For additional onboarding guidance, check out this episode of our Hey Salespeople podcast, Onboarding Reps for Sales Excellence. There you'll find answers to questions like:

- How do you create an onboarding process that "forces" people to learn?
- What are some specific activities to include in onboarding to ensure success?
- What should leadership's commitment be to new hires?
- What are some common "misses" when selecting new sales reps?
- How do you address compensation during onboarding and ramping?

30, 60, and 90-day goals for new sales reps

Use the reports and guidance below to ensure new sales reps are progressing at the right pace and improving their skill sets in a timely way.

30 Days:	60 Days	90 Days
Are they using the tool?	*Are they getting results?*	*Are they improving?*
Daily People Targets: Ensure reps are working enough prospects to reach their weekly and monthly goals by adding a consistent number of people to cadences each day. *Baseline: 5*	**Ideal Reply Rate**: Review the number of email replies divided by the total number of emails sent. *Baseline: 5-10%*	**Top Cadences and Templates by Email Engagement**: Review the data on cadences and templates your team is using. Retire what isn't getting results and A/B test what's working.
Daily/Weekly Activity Targets: For reps, completing Activities in SalesLoft must be their new norm. *Baseline: 20 emails and 20 calls per day*	**Positive Conversations**: Review the ratio of connected calls that resulted in a desired outcome. *Baseline: 15%*	**Cadences Yielding Most Opps**: Review and share the data with reps. Redefine which cadences they should be using.
Overdue Cadence Steps by User via the SFDC dashboard: Use this report to see which reps aren't completing steps on time. *Baseline: <5%*	**Refine Activity Targets**: Based on activity results from the previous 30 days, adjust reps activity targets. *Baseline: 30 emails and 30 calls per day*	**Cadence/Template Cleanup**: Each quarter, review the cadences and templates that aren't being used or yielding results.
Usage Report: Review SalesLoft which breaks down last login and activity by user.	**Meetings Booked Leaderboard**: Use this report to understand who's on top. Replicate top performers' activities.	**Define KPIs**: Based on the performance of the last 60 days, define clear KPIs for the team.

Analyze performance and crush call coaching

SalesLoft Analytics measures your team's middle-of-funnel sales activity and gives you relevant metrics for coaching. Access your team's sales activity in SalesLoft through the Analytics Page.

Understanding the analytics page

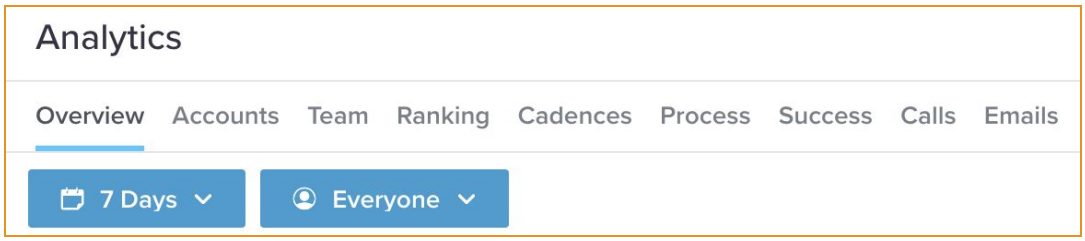
SalesLoft's analytics measure the effectiveness of your sales process. The metrics and reports allow you to hold your team accountable and improve the way you sell. The SalesLoft Analytics page houses several useful reports to help you better track your team's sales activities.

Get to the Analytics page by clicking "Analytics" on the left-hand column in the SalesLoft Web App. That action will open an Analytics Overview page.

Analytics toolbar

At the top of the analytics page, you'll find the toolbar. The toolbar appears on each tab within the analytics page and allows you to navigate to other tabs, filter the data you view, and export metrics to a CSV file.

The analytics toolbar contains the following options:



Filter options

You can filter each report to see data for a specific timeframe, group, or member of your team.

Overview

Provides an overall snapshot of your email, phone, and other activity during the specified timeframe. This tab is best for getting a snapshot of your general activity metrics.

Accounts

Provides an overview of the account-based activity that your team has completed. These centralized metrics make it quick and easy to see the most and least engaged accounts through several data points.

Team

Provides a detailed report of your team's performance with SalesLoft activities. Admins and users alike can quickly view the number of tasks that reps have completed.

Ranking

Allows you to see how team members are performing as compared to one another. If you want to encourage competition among your reps, this tab will display which rep is at the top of the leaderboard. Results are ranked based on number of successes, number of positive conversations on calls, and number of email replies.

Cadences

Centralizes the important metrics about your cadences in one convenient location. From the report, you can view a list of all cadences, which you can filter and sort to your viewing preference. This visibility allows for comparison of cadences so you can see which campaigns are performing best based on open rates, clicks, replies, and more, in one list view.

Process

Provides insight on whether your team is actively sticking to the process set forth by their cadences. See if they're completing cadence steps at all and on time, and if they're skipping any steps. The tab also includes a process leaderboard that shows who on your team best adheres to the process.

Success

Provides insight on how long it takes to accomplish your goal with a prospect. As a team, a "success" is setting a demo with a prospect. These metrics show you how often your team succeeds and how many people you must add to your outbound process to achieve one success.

Calls

Shows your call effectiveness based on how often you connect on calls, the dispositions logged, and the sentiments logged. From this tab, you can learn if you're having meaningful conversations and determine the best time to make calls.

Email

Provides insight on the effectiveness of your email templates and the time of day you send emails. The top view shows which of your templates are most and least engaging, based on reply rate of delivered emails.

To provide even more activity data, leverage the Insights Dashboard, a managed package you can add to your Salesforce instance.

Call coaching best practices

Call coaching is essential for performance feedback. First, check out this SalesLoft University video on call coaching and strategy as a primer. You'll learn about tools like Live Call Studio which allow you to join and listen to user's active calls to provide real-time coaching. Live Call Studio also lets reps "raise their hands" for help with calls.

When establishing your own coaching process, follow this weekly program. Bucket reps into:

- Performing (100%)
- Refinement (70-99%)
    - Two call coaching sessions
    - 1-hour call coaching with manager
- Needs coaching (>70%)

    - Two call coaching sessions
    - Manager reviews 2 hours of calls independently, then delivers feedback to rep

Then, use Live Call Studio to provide daily, real-time feedback to your reps. Here's how to structure that time.

- Attend calls from 11:00 am - 12:00 pm. Use this time to review both the East and West Coasts' calling campaigns.
- Attend calls from 4:00 pm - 5:00 pm. This is the call power hour. Have multiple managers engaged during these call blocks.
- Provide feedback at the right time.
    - Don't jump in on your reps' call conversations too much. There's no better way to ruin a rep's confidence than a mid-call take over, so don't commandeer a call.
    - Highlight quick points for the rep during the call.
        - Gather notes during the call for review later.
        - Provide detailed feedback after the call.

Master cadence creation and management

Now that we've talked about putting SalesLoft through its paces, let's switch gears to focus on cadence creation. A prospecting cadence helps both SDRs and Account Executives start real conversations and set opportunities with prospects. The email templates, phone calls, voicemails, and social media interactions are meant to answer why a prospect should listen and why they should care. Here are some best practices to follow.

A cadence should mimic the prospecting process, catered to an industry and individual. Cadences must provide meaningful, relevant, and attention-grabbing information to connect with prospects and drive results. This is table stakes and an expectation of our prospects. Personalization also helps to ensure the messages we send make it to the prospect's inbox.

Cadence structure should rarely change, while cadence content should frequently evolve. Keeping cadence structure static lets you know exactly what your sales teams are doing and helps you coach them better. While the structure rarely changes it should still be included on checklist when running a cadence audit, especially if you have recently moved to a new go to market stragety.

Your account executives should use 1-2 prospecting cadences. Keeping your reps' prospecting at this number helps them best fulfill their daily prospecting activities.

Wipe out the cadence sidebar every day. Your reps need to be consistent with their sales communications. Not completing steps on the right day or skipping steps entirely breaks the rhythm in the process.

Ensure new team members execute a cadence for their first month. Building this habit will set reps up for success. Ask these two questions if your new hires struggle to complete all tasks:

- Do you feel overwhelmed?
- What's holding you back?

Cadence creation

There's a lot to consider when you're planning cadences. What types of cadences do you need to support your sales scenarios? How many cadences do you need? And what assets must you create to support them? Here are some guidelines.

1. **Define industry-specific prospecting cadences** – There is no one-size-fits-all prospecting cadence when it comes to industry verticals. You must base your cadences on product and buyer priorities. Additionally, the personas you're targeting may need slightly different cadences from one another.
2. **Define situational prospecting cadences** – Your sales team should have multiple prospecting cadences to help them target the prospect's current situation. For instance, are you trying to expand in other departments, is this an open opportunity, or are you dealing with a closed/lost prospect? Set the cadence tempo and the prospect import volume to meet prospecting requirements.
3. **Email, social media, and call templates** – Your sales team should have a set of default email templates to choose from as well as templates for reactive messaging after a conversation with a prospect begins.

Cadences types

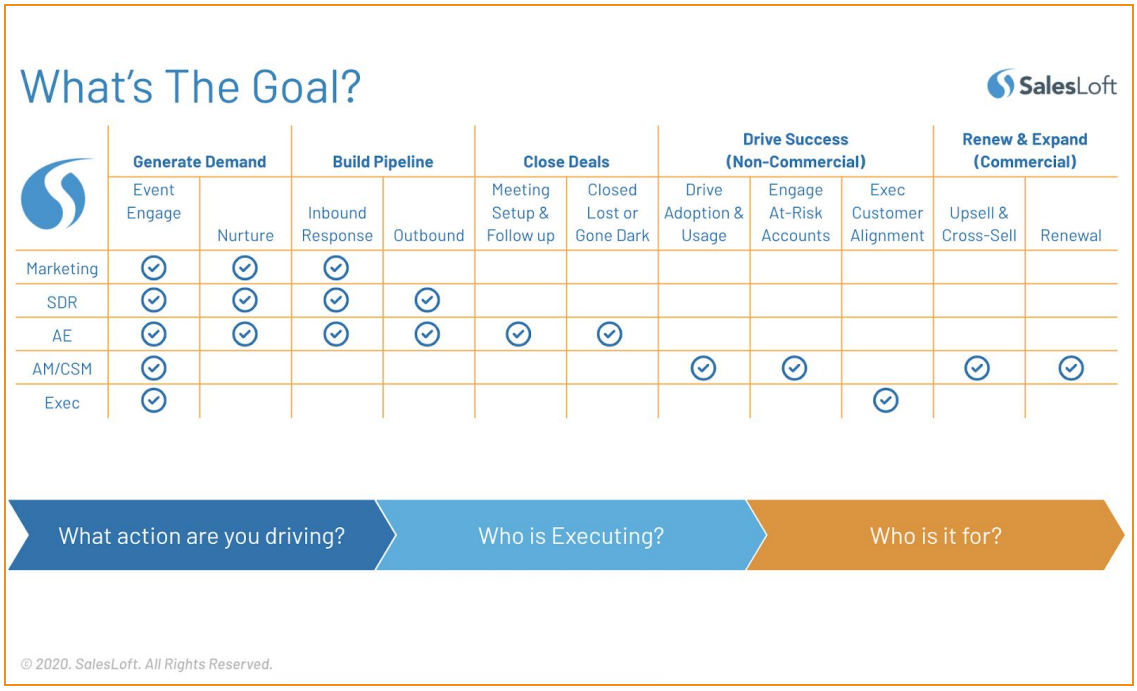
- **Inbound Prospecting** - Short cadence, engage as quickly as possible, front load the cadence with more frequent touchpoints at the beginning.
- **Outbound Prospecting** - Longer cadence, more touch points during the first 5-10 business days, add automation at the end
- **Open Opportunity/Pipeline** - Cadence length is average sales cycle, start with a template (most likely follow-up from a demo), get less templated the more you personalize

- **Closed/Lost** - Cadence is 6-12 months long, average one touch a month, always give to the prospect, never ask. This is one of the most effective cadences we saw from our customers in 2019.

Cadence attributes

- **Marketing-Qualified** – focus on marketing-generated leads
- **Outbound** – focus on self-sourced leads or purchased lists
- **Relational** – focus on large deal sizes, long sales cycles, multiple buyer personas
- **Transactional** – focus on small deal sizes, short sales cycles, fewer buyer personas
- **Precise** – include fewer overall touches and focus more on passive forms of communication, such as social interaction
- **Assertive** – include more overall touches and emphasize more assertive communication methods

Here is an example of a content matrix to give you an idea of how to orchestrate a full prospect communication plan.



Cadence maintenance

As your cadences age, you need to continually assess their performance and adjust them for success. What's working today may not work tomorrow. In this phase, iterating content is critical because selling trends change quickly and frequently.

You also need to ensure your team is completing cadence tasks. Using SalesLoft's in-app analytics, here are some questions to ask yourself monthly and quarterly, along with best practices for testing and analysis.

- Monthly adjustments
    - Why did we get these results?
        - Phone vs. email
        - Compare to top reps
        - Reply rate analysis
- Quarterly adjustments
    - Are our cadences still effective?
    - Where is the team spending time personalizing?
    - Are those efforts yielding the most ROI? If you aren't sure, do an A/B test. Use the same cadence steps but change the personalization in different places to see if that improves your results.
    - What are the outliers? Is there a top-performing template or cadence worth turning into a team template or team cadence for all reps to use?
- Best practices for testing and analysis
    - To understand the nuances from rep to rep, have everyone run one cadence, but allow for customization.
    - Dig into the variants in your process. Using variants can help you understand if a particular approach is working or not.
    - Determine whether your sample size is large enough to pursue a permanent process change.
    - Measure Efficiency Scores

- Per 1,000 activities, how many meetings are being scheduled?
- How many activities does it take to get a single meeting?
- Study/audit cadences with excellent ratios.

Cadence FAQs

- How many touches should my cadence have?
- What touch patterns should my cadence have?
- What's an example of an effective cadence?

How many touches should my cadence have?

Research and advisory firm TOPO found that the average number of touches per prospect is 16. That's a 36% increase over the previous year, indicating that the competition is ramping up its efforts.

What touch patterns should my cadence have?

TOPO found that 80% of sales development teams are leveraging a triple-touch strategy composed largely of email, phone, and LinkedIn. This prediction comes as no surprise: triple-touch patterns will soon become "five-touch." The new additions include video and direct mail. Personalized video in touch patterns has proven to increase connection and response rates.

What's an example of an effective cadence?

We researched 200 million cadence conversations to find this high-performing cadence. Day 1 starts with a data integrity touch. The goal? To ensure the prospect has the right communication channels across touchpoints.

With this cadence, encourage your team to note some facts about the prospect which will save time when running steps. The cadence is slightly front loaded as more steps happen in the first 5-7 business days. We found most responses occurred between 5-10 business days.

Here are a few examples of well performing cadences which are situation specific:

Inbound Response Demo Request:

SalesLoft

Inbound Response Demo Request

Rapid Response for High Priority Leads

Cadence Objectives

Inbound Conversion rates are highest when a rep responds in less than an hour. The goal of this cadence is to rapidly surface leads to reps, automating the first email, so that we can schedule an initial meeting.

Target

Demo Requests and Contact Us Leads

Tips and Tricks

- Use Automation Rules to trigger leads directly into this cadence
- Provide your SalesLoft Meeting Link to make it easier for prospects
- Consider moving prospects to Nurture cadence if no response

Engagement Channels

Email | Social | Text | Phone | Video | Direct Mail

Complexity Level

Easy to Implement | Takes Time | Let Us Help You

Role

Mktg | CSM | SDR | AM | AE | Exec

Benchmarks and Goals

22% to 31%
Benchmark Conversion rate if response time less than 1 hour

40% to 50%
Goal for Click Rate on Email 1

10% to 20%
Goal for Reply Rate on Email 1

Back to Cadences

Demo Request

12 Steps over 9 Business Days

SalesLoft

DAY 1
- **Step 1 | Email** — Automation rule pushes inbound lead into the cadence automatically. Email sent immediately, giving calendar link for easy scheduling
- **Step 2 | Call** — First Call. Leave Voicemail
- **Step 3 | Call** — Second Call. No VM

DAY 2
- **Step 4 | LinkedIn** — Personalized connection on LinkedIn
- **Step 5 | Call** — Call 3. Leave VM referencing email to schedule time to connect

DAY 3
- **Step 6 | Email** — In-thread follow up to first email, scheduled to go out early morning in prospect's timezone
- **Step 7 | Call** — No voicemail

DAY 4
- **Step 8 | Email** — Third Email. Share the value they will get out of a call

DAY 5
- **Step 9 | Call** — Leave VM referring back to email thread

DAY 8
- **Step 10 | Call** — Final Call. Leave VM
- **Step 11 | Email** — Final Email. Give specific times to connect

DAY 9
- **Step 12 | Other** — Where should this person go from here? Anything else on social you can do to connect? Move to Nurture cadence?

Personalized/Account Based Outbound Prospecting

SalesLoft

Personalized/Account Based Outbound Prospecting

Gold Standard Backed by Data

Cadence Objectives

Outbound Cadence built to support your teams general prospecting. Can be used as a template to support multiple verticals or personas. Goal is to schedule an initial meeting with a cold prospect.

Target

High Priority Decision Makers within your target accounts or territory. Use this cadence to connect with your buyer.

Tips and Tricks

- 20% Personalization of Email 1 leads to 2x increase in response rate
- Consider using Video in the 2nd or 3rd email step
- "Follow" the prospect on LinkedIn during the initial research step
- Last "Other" step is a holding tank. Consider using Automation rules to send them straight into a Nurture Cadence

Engagement Channels

Email | Social | Text
Phone | Video | Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg | CSM
SDR | AM
AE | Exec

Benchmarks and Goals

77% to 91%
Increase in response rate when using multiple channels

20% to 30%
Goal for Open Rate

7% to 10%
Goal for Reply Rate on Email 1

Back to Cadences

Personalized/Account Based Outbound

16 Steps over 17 Business Days

SalesLoft

DAY 1
- **Step 1** | Other — Check all person and company data for accuracy, follow the prospect on LinkedIn while doing research, and enter that research into "Notes"
- **Step 2** | Call — First Call. Leave Voicemail
- **Step 3** | Email — First email. Personalize based on the research you've done on the prospect

DAY 2
- **Step 4** | Call — Morning Call. No VM
- **Step 5** | Call — Afternoon Call. No VM

DAY 4
- **Step 6** | Call — No voicemail, follow up with an email
- **Step 7** | Email — In-thread follow up to first email

DAY 5
- **Step 8** | LinkedIn — Personalized connection on LinkedIn

DAY 7
- **Step 9** | Email — New email thread. Consider Vidyard for this step
- **Step 10** | Call — Leave VM referring back to email

DAY 11
- **Step 11** | Call — Morning call
- **Step 12** | Email — Fourth Email

DAY 12
- **Step 13** | Call — Afternoon Call

DAY 16
- **Step 14** | Call — Final call. Leave Voicemail
- **Step 15** | Email — Final Email

DAY 17
- **Step 16** | Other — Where should this person go from here? Anything else on social you can do to connect? Move to Nurture cadence?

Full Cycle Outbound Prospecting

SalesLoft

Full Cycle Outbound Prospecting

Fill Your Pipe and Spend More Time Closing

Cadence Objectives

Built for full cycle reps who are focused on closing deals. Gaps are extended between steps, and the cadence runs over the course of a month. Goal is to build credibility and schedule an initial meeting.

Target

High Priority Decision Makers within your target accounts or territory. Use this cadence to connect with your buyer.

Tips and Tricks

- First email should be heavily personalized to the individual prospect
- Consider using Video in the 2nd or 3rd email step
- Leverage Linkedin to like, comment, or generally engage with the prospect

Engagement Channels

Email | Social | Text | Phone | Video | Direct Mail

Complexity Level

Easy to Implement | Takes Time | Let Us Help You

Role

Mktg | CSM | SDR | AM | AE | Exec

Benchmarks and Goals

77% to 91%
Increase in response rate when using multiple channels

12.5%
Increase in Response Rate with Video

7% to 10%
Goal for Reply Rate on Email 1

Back to Cadences

Full Cycle Outbound Prospecting

13 Steps over 26 Business Days

SalesLoft

DAY 1 — **Step 1 | LinkedIn**
Check that all person and company data is correct for dynamic tags. Take the opportunity to follow the prospect on LinkedIn while doing research, and enter that research into "Notes"

Step 2 | Email
First email. Personalize based on the research you've done on the prospect

DAY 2 — **Step 3 | Call**
First Call. Leave Voicemail Referencing Email

DAY 4 — **Step 4 | Call**
No voicemail, follow up with an email

Step 5 | Email
In-thread follow up to first email

DAY 5 — **Step 6 | LinkedIn**
Personalized connection request on LinkedIn

DAY 7 — **Step 7 | Call**
Leave VM referring back to email

DAY 9 — **Step 8 | Email**
New email thread. Consider Vidyard for this step

DAY 12 — **Step 9 | Call**
Morning call

DAY 16 — **Step 10 | Email**
Fourth Email

DAY 21 — **Step 11 | Call**
Afternoon Call

DAY 25 — **Step 12 | Email**
Final Email

DAY 26 — **Step 13 | Other**
Where should this person go from here? Anything else on social you can do to connect? Move to Nurture cadence?

Meeting Confirmation

SalesLoft

Meeting Confirmation

You Worked Hard for That Meeting. Make Sure it Happens

Cadence Objectives

Both SDRs and AEs can take steps to improve show rates on meetings that they set. The goal of this Cadence is to ensure that the meeting happens.

Target

Prospects who you've scheduled a meeting with

Tips and Tricks

- You should put someone in this cadence as soon as you schedule the meeting
- After step one, you'll need to align due dates of the next steps based on the meeting date
- Call step is optional

Engagement Channels

Email | Social | Text
Phone | Video | Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg | CSM
SDR | AM
AE | Exec

Benchmarks and Goals

Reduce No-show Rates from
40% to **10%**

Back to Cadences

Meeting Confirmation

4 Steps from Meeting Set to Meeting Completed

SalesLoft

Step 1: Email
Confirm Meeting after scheduling and send calendar invite

Step 2: Email
Send Agenda the day before the call

Step 3: Call
Optional call day of meeting

Step 4: Email
Day of meeting confirmation email

Closed/Lost Nurture

SalesLoft

Closed/Lost Nurture

Can't win them all (right now)

Cadence Objectives

In sales, even the best reps can bat .250 - How do you stay engaged with the deals you don't win? This cadence is meant to keep you engaged when a prospect goes with a competitor or delays a decision 6-12 months.

Target

Prospects from deals you have lost

Tips and Tricks

- First Email is your chance to thank them for their consideration, and promise to stay in touch
- Cadence is built to last 6 months, with an email once a month
- Use LinkedIn to stay engaged
- Consider sharing content that is not built by you. Share blog posts from other experts and pull out quick takeaways

Engagement Channels

Email | Social | Text | Phone | Video | Direct Mail

Complexity Level

Easy to Implement | Takes Time | Let Us Help You

Role

Mktg | CSM | SDR | AM | AE | Exec

Benchmarks and Goals

5% to 10%
Goal for Click Rate to show your content is resonating. A/B Test your emails

15% to 25%
Goal for % of opportunities revived

Back to Cadences

Closed/Lost Nurture

10 Steps over 102 Business days

SalesLoft

DAY 2 — **Step 1** | Email
Thank them for their evaluation

DAY 23 — **Step 2** | Email
It's been about a month. How are things going?

DAY 35 — **Step 3** | LinkedIn
Engage on LinkedIn

DAY 45 — **Step 4** | Email
Value Add Content

DAY 59 — **Step 5** | LinkedIn
Engage on LinkedIn

DAY 62 — **Step 6** | Email
Value Add Content

DAY 75 — **Step 7** | LinkedIn
Engage on LinkedIn

DAY 86 — **Step 8** | Email
Value Add Content

DAY 101 — **Step 9** | Email
Is timing better now?

DAY 102 — **Step 10** | Other
Where should this person go from here?

Victory is yours

We hope this playbook serves you! And, we believe that if you follow its practical steps, you'll lead your sales team to smashing success.

Consider Jason Smith of IO Education. Using SalesLoft to its fullest, he achieved 110% of goal in just 10 months with a brand new team. We know you can lead your team to victory too. We're cheering you on from the sidelines, and we're always here to help.

So, if you have any questions, reach out to your SalesLoft contact. And check out the appendix in the following pages for quick access to supporting assets in the SalesLoft Knowledge Base.

Appendix: SalesLoft Knowledge Base

Templates

- Complete Templates Guide
    - Template Actions (includes tagging and copying)
    - How to Filter and Sort Templates (by tags, stages, etc.

Cadences

- Creating a Cadence from scratch
    - Video walkthroughs:
        - Creating a Cadence
        - Adding an Email Step
        - Adding a Phone Step
        - Adding an Other Step
- Cadence Actions (includes tagging and copying)
    - How to Filter and Sort Cadences
- Running your Cadence steps (including running steps, skipping steps, and sorting)
- How to change a prospect's Due Date for a step
- How to Skip a Step for a prospect
- How to log a Success for a prospect

Importing people

- Importing prospects from Salesforce to existing Cadences
    - Account-Based Importing
- Tagging prospects when importing
    - How to Filter and Sort People (tagging, cadence stage, import, etc.)

Dashboards

- SalesLoft Home Dashboard
- Learn all about your Live Feed.