



blink

Sales Training I Intro to Prospecting

Our Mission

Blink was created to fill the disconnect between diverse marketing skill sets and the sales problems they're expected to solve.

We have a comprehensive tool set including campaign management web development, print materials, photography, videography, and sales training.

We help you decide which tools to use through data-driven insights. We mobilize your sales initiatives by continuous testing of creative concepts and perpetual duplication of proven principle

Sales prospecting is the crucial undertaking of initiating and cultivating new business connections by seeking potential customers, clients, or purchasers for your products or services. The objective is to guide these potential leads through the sales cycle until they transform into revenue-generating customers.

Why is sales prospecting significant?

Sales prospecting empowers you to connect and collaborate with potential customers whose needs and interests align with your offerings. It grants you insight into the pain points of a prospect, ensuring that you are reaching out to contacts who are receptive to your value proposition.

Moreover, it is highly effective. Research from RAIN Group reveals that more than 70% of buyers desire early contact from salespeople, with 82% of buyers accepting meetings when approached by a salesperson.

Top-performing sales professionals generate almost three times as many sales meetings through prospecting compared to those who neglect this crucial phase.

Successful prospecting enables you to schedule meetings with leads that are a better fit, individuals with genuine needs or interest in your offerings. Such well-suited customers typically result in more long-term business relationships.

They become particularly valuable clients and are less prone to churn shortly after closing a deal compared to less suitable counterparts. But how do you identify these good-fit customers? Typically, it begins by asking the right questions; for more insights on this process, please refer to this article.

Prospects are often confused with another category of contacts called leads. As a salesperson, it's vital to differentiate between the two since you will be interacting with both during prospecting, and each requires a distinct approach.

While they may appear similar, as both are found at the top of the sales funnel, there are key distinctions between leads and prospects. Let's delve into these differences.

Lead vs. Prospect

Leads are potential customers who have shown interest in your company through actions like visiting your website, subscribing to your blog, or signing up for a free trial.

Prospects, on the other hand, are leads that have undergone further research and qualification. They possess the qualities, potential needs, and interests that align with the solutions you offer.

For instance, imagine your business sells project management software for growing construction firms. If the owner of a small construction company, which recently secured a major contract with a fast-food chain, subscribes to your blog, they would likely be considered a prospect, not just a lead.

Depending on their qualifications and suitability, a prospect (as opposed to a lead) can be categorized as a potential customer even if they have had limited or no interaction with your company.

However, regardless of these distinctions, the ultimate goal when dealing with prospects and leads remains the same — to nurture them until they become customers. This process begins as soon as you start prospecting and continues until the deal is closed.

But how do you commence the prospecting process? Below, we've outlined a simple guide to get you started, along with proven tips for identifying good-fit prospects who are more likely to convert.

How to Start Prospecting

- Conduct research on your prospects and their businesses to assess if you can provide value.
- Prioritize your prospects based on their likelihood of becoming customers.
- Craft personalized pitches for each prospect.
- Execute the ideal initial outreach, ensuring that you are assisting rather than selling.
- Continuously refine your prospecting process to identify areas for improvement.
- Unproductive prospecting can consume a significant amount of time, and certain strategies have proven to be more effective than others. To maximize your efforts, we recommend leveraging the inbound framework, a method adaptable to almost any sales process.

However, it's worth noting that the most productive prospecting method for you is the one that aligns with your unique skills and offerings. The prospecting frameworks, tactics, and concepts that work best for you may not be identical to those of your peers.

That's why we've incorporated personal prospecting tips and tricks from top sales professionals we know. Select and experiment with the strategies that best suit your sales approach.

Thoroughly research your prospects and their businesses to determine if you can provide value. Throughout this guide, you'll repeatedly encounter the importance of qualifying your prospects. It is the cornerstone of effective prospecting. You cannot offer value to a business if you have no understanding of what is valuable to them.

During this stage of prospecting, strive to achieve several goals:

- Evaluate the feasibility of working with the prospect.
- Qualify and prioritize prospects.
- Identify opportunities to establish a connection through personalization, rapport building, and trust development.

Prioritize your prospects based on their likelihood of becoming customers.

It may seem obvious, but some prospects are more likely to convert than others. To save time and maximize your potential for successful deals, it's essential to know where to concentrate your efforts. This begins with the strategic prioritization of prospects.

How you prioritize prospects may depend on factors such as your role, your industry, and your sales organization's preferences. However, regardless of these variables, the fundamental concept boils down to creating categories or buckets of prospects and focusing on them one at a time.

Scoring Potential Prospects

Prospects are typically evaluated based on specific criteria, meaning certain attributes—such as deal size or timing—carry more weight than others when identifying promising prospects. These elements hold greater importance during the qualification process.

For instance, when qualifying a lead to determine if they could become a viable prospect, you can approach it by thinking in terms of percentages and scores.

The "percentages" aspect pertains to the importance of specific criteria relative to others. If your sales organization places the highest priority on deal size, that criterion might account for 70% of what defines an ideal prospect. If timing is considered relevant but less critical, it might make up 10% of the ideal prospect profile.

Next, assign a score between 1 and 100 to each dimension for each potential prospect, reflecting how well the lead aligns with the ideal criteria. For instance, if a lead's potential deal size perfectly matches your ideal, you would assign a score of 100 for that criterion. Conversely, if it's a poor fit, you would assign a score of zero.

Subsequently, multiply the score for each criterion by the corresponding percentage weight. For example, if a lead's potential deal size is rated at 50 out of 100, and this criterion represents 70% of the overall evaluation, it would contribute 35 to the prospect's total score.

Finally, sum the products of each criterion's score and percentage weight to arrive at a total score for the prospect. This allows you to create a ranked list of potential prospects based on their viability, enabling you to prioritize your prospecting efforts.

While this process can seem complex to manage manually, there are numerous lead management tools that can automate this scoring process.

Create a personalized pitch for each prospect.

Every prospect is unique, possessing their own backgrounds, interests, needs, and preferences. None of them wish to be treated as just another name on a list. Therefore, it's essential to gather comprehensive information about your prospects to develop effective, personalized pitches and engage in more targeted outreach.

To understand what matters to your prospects, consider the following methods:

- Examine the prospect's blog to gain insight into their interests through the articles they write and publish.
- Review their social media profiles to identify recent updates or new posts.
- Explore the company website, particularly the "About Us" section.
- Of course, these are not the only avenues for gathering information. There are various ways to gauge crucial elements that can shape your approach, including your prospect's interests, their company's operations, performance, industry landscape, competitive position, and common challenges faced by similar businesses.

Once you have a deeper understanding of your prospect's business and role, look for a compelling reason to connect. Do you share mutual connections? Has there been a triggering event? Have they recently visited your website? If so, what search terms led them there, and which pages did they explore?

For a more comprehensive preparation, you can create a decision map outlining the prospect's options and ultimate objectives. This can help you address objections more effectively and tailor your pitch to align with their primary goals.

- Craft the perfect initial contact and ensure you provide assistance rather than focus solely on selling.
- As previously mentioned, personalization is a key factor in creating an effective pitch.
- However, personalization extends beyond your message to how you initiate your conversations. Whether you are making a phone call or sending an email, your initial outreach should be customized to match the prospect's business, objectives, needs, industry, and personal preferences.

Consider these tips when reaching out to a prospect, whether by phone or email, to ensure that your communication is as precise and effective as possible:

Personalize your message.

- Reference a specific challenge that the prospect is facing and propose a specific solution.
- Stay relevant and timely by ensuring that the issue the prospect is trying to resolve remains pertinent to them and their team.
- Maintain a human touch.
- Avoid coming across as an automated professional. Adding personal touches such as extending holiday greetings or expressing admiration for their company's products can establish a more meaningful connection.
- Focus on helping, not selling.
- Provide value without immediately expecting something in return. This process is about addressing the prospect's needs rather than pushing a sale. For instance, instead of scheduling a follow-up meeting, offer to conduct an audit of their digital media presence and provide findings within a week.
- Keep it informal.

Remember that this is a conversation, not a hard sell. Maintain a natural, non-salesy tone. The essence of prospecting lies in exploration and understanding mutual benefits, not immediate selling.

Continuously refine your prospecting process to identify areas for improvement. Effective prospecting is an evolving practice. You need to continually track, learn from, and enhance your process to refine your approach and consistently achieve positive outcomes.

After each prospecting engagement, keep detailed notes throughout the process. Evaluate which activities added value to the prospecting process and which consumed unnecessary time.

Following each interaction with a prospect, assess how well you:

- Identified their challenges.
- Facilitated the development of well-defined objectives.
- Verified the availability of budget.
- Understood their decision-making process.
- Recognized the consequences of inaction.
- Identified potential outcomes of success.
- Engaging in this self-reflection will enable you to refine your sales prospecting techniques and strategies in the future.

Now, let's look at a few tips straight from the sales desk on how to better qualify prospects and win more deals.

Sales Prospecting Tips

- Look at your prospects' career pages.
- Use the GPCTBA/CI sales qualification framework.

- Classify prospects with ratings.
- Subscribe to your prospects' blogs.
- Keep track of your prospects on Twitter.
- Batch prospecting sessions.
- Use a healthy mix of email and phone communication.
- Use the BASHO sequence for emails and calls.
- Follow-up after a closed-lost deal.
- Thoroughly understand your vertical.

Ask for referrals.

1. Look at your prospects' career pages.

Understanding a company's priorities and direction can inform smarter, more targeted prospecting. Having a pulse on where a business is investing or growing reveals its specific interests and challenges — helping you shape more thoughtful, specific value propositions. But where can you readily access that kind of information?

Well, a company's careers page is a good place to start. A business's job board is one of the most reliable, public-facing resources you can reference to find that intel.

Let's say you sell a suite of marketing solutions that includes a content management system. If you see that a company has job listings for multiple content marketing roles, you can tailor your pitch to highlight the benefits of your CMS.

Or, if your prospect's company is public, you can also look at their annual financial report (dubbed a 10-K) under the "Risk Factors" section to see if there's alignment between its stated business challenges and your product offering.

2. Use the GPCTBA/C&I sales qualification framework.

- GPCT (Goals, Plans, Challenges, Timeline)
- BA (Budget and Authority)
- C&I (Negative Consequences and Positive Implications)

With that in mind, you can focus on creating a highly targeted, relevant list. Based on your research, you should have a fine-tuned profile of your target customer — and every company or individual on your prospect list should meet those criteria.

3. Classify prospects with ratings.

Qualitatively classify prospects by rating them on a spectrum from high to medium to and low suitability. Here's what that looks like:

High

- Matches criteria for customer persona
- Has clear business challenge that aligns with your product offering
- Able to connect with a decision-maker
- You have a mutual connection or common interest (i.e. mutual friend on LinkedIn or both graduated from the same college)
- High level of interaction with your website or social media accounts
- Recommended effort: Five touch points every other business day

Medium

- Match some elements of your customer persona
- Has clear business challenge that aligns with our product offering
- Able to connect with an influencer
- Some level of interaction with your website or social media accounts
- Recommended effort: Four touch points every other day

Low

- Doesn't match your customer persona
- Unclear business challenge
- Not able to connect with an influencer or decision-maker
- Limited or no interaction with our website or social media accounts
- Recommended effort: Three touch points every other day

4. Subscribe to your prospects' blogs.

Kyle Van Pelt, Executive Vice President of Sales at Skience, reads 30 articles in 30 minutes every day and uses the content in his email outreach in a tailored, relevant way. And he achieved a 90% response rate.

Kyle uses Digg to subscribe to the companies' blogs he thinks would make for good prospects.

Here's how it works:

- Open each interesting post in a new tab.
- Skim each post.
- Read the most interesting posts.
- After skimming through all of the options, narrow the final list down to the most interesting posts. There will typically be between 20-30 posts left. You should put yourself in the prospect's shoes as we're reading these articles, searching for pain points or trigger events.

- Use the most interesting, relevant information you find in the articles to tailor an email or a call to your prospect.
- All of these questions will help us craft more context around our prospect's situation, which will help us when we're ready to make that initial contact.
- All of these questions will help you craft more context around your prospect's situation, which will help you when you're ready to make that initial contact.

5. Keep track of your prospects on Twitter.

Everyone's on Twitter — including your prospects. Create a list of top-priority prospects on Twitter to more easily track trigger events and streamline the research process. Here's how to set it up on Twitter's mobile app:

- Click your profile picture in the upper left-hand corner, and then click "Lists."
- Now click the blue button with a list icon and a plus sign on the bottom right-hand corner
- Name the list and then set it to "Private" so only you can access it.
- Now add the prospects you want to track to your list. Just search for their accounts and click the button that says "Add."

Note: You may want to group your high-priority prospects in one list, followed by your medium-priority prospects, and then low-priority

Now, you can focus on creating a highly targeted, relevant list. Based on your research, you should have a fine-tuned profile of your target customer, and every company or individual on your prospect list should meet those criteria.

6. Batch prospecting sessions.

Batch prospecting sessions for two to three hours at a time and take a quick five-minute break between each hour. Get an egg timer, and set the timer on a countdown for 20 minutes, 30 minutes, or 45 minutes, depending on how much time you scheduled for the call.

End the call on the timer's beep, use 5 minutes for following up, 5 minutes for updating notes and administrative tasks in your CRM, and then use 5 minutes to prep for the next call.

7. Use a healthy mix of email and phone communication.

In terms of establishing contact, you must decide between email or phone communication. Some of us will initially jump on the cold email approach while others will dive into the cold call. This strategy will vary based on what each salesperson feels most comfortable with.

First, let's take a look at the pros and cons of email communication:

- Emails are visual and allow prospects to consider the offer on their time.
- Email is a cluttered space so it may be harder to grab a prospect's attention.
- Emails provide prospects with adequate time to research the company and product.
- They're easily deleted or forgotten.
- They're easily forwarded to key stakeholders who might be a better fit to speak with.
- We may have to follow up multiple times before we get a response.

Now, let's look at the pros and cons of phone communication:

- Calls are less common than email, so they can grab a prospect's attention quickly and more easily.
- Some prospects may feel overwhelmed by a call and thus be less inclined to consider a pitch or schedule a second meeting.
- They immediately establish a more intimate connection and offer salespeople the chance to develop rapport.
- While intimate, calls can be seen as intrusive, especially when unscheduled.
- They're often more timely than email communication and can accelerate the time it takes to close a deal.
- There's no guarantee a prospect will pick up the phone. Voicemail can often be as cluttered as email depending on volume.
- Successful first-touch strategies often incorporate both approaches to take advantage of the pros and minimize the cons.

8. Use the BASHO sequence for emails and calls.

Jeff Hoffman pioneered the BASHO sequence, which advocates a combination of voicemail and emails to gain leverage with prospects.

- Voicemail / Email: Wait for 24 hours
- Voicemail / Email: Wait for 48 hours
- Voicemail / Email: Wait for 72 hours
- Voicemail / Email: Wait for five days
- Breakup Voicemail / Email

Alternating between voicemail and email, with unique messaging each time, this technique allows prospects to consider your offer, conduct their own research, and respond at a time convenient for them.

But how do you leave a voicemail or send an email that prospects want to respond to? Let's dive into the dos and don'ts of each communication method below.

The Warm Email

If you're looking to send a first-touch email that gets opened, there are some essentials that we must include:

- Engaging subject line: The subject line has to pique the prospect's interest while avoiding cliché hooks.
- Personal opening line: You should begin your cold email by saying something about them, not about your business. After all, this process is about finding the prospect's pain points and determining a way to add value to their business or processes.
- Creating a connection: Now, you have to make the connection. In your opening, they learn why we're reaching out to them, but now they need to know why they should care about what you do.
- Clear call-to-action: Suggest a concrete time to connect or ask a close-ended question to make it clear that the ball is in their court. Try using one of these lines: "Do you have ten minutes to catch up tomorrow?" or "Are you available for a 30-minute call on Tuesday between 9 and 11 AM?"

Try sending a calendar invite, instead of an email, to get straight to the point. In the description section, you can type up a personalized message like this:

Calendar invite with a cold email in the description

Jill Konrath also suggests scheduling a short five-minute meeting to get your foot in the door with prospects whose calendars are particularly swamped.

The Prospecting Call

If you decide to call a prospect, whether in conjunction with an email or not, you can follow this basic structure for the call:

- Establish rapport: You shouldn't shy away from personal conversations, like asking how a prospect's weekend was or what team they're rooting for in the game tonight. These intimate touches help us develop a more meaningful relationship with prospects and enhance your likeability which, hopefully, means a prospect will be more likely to buy from you.
- Leverage pain points: Dive into their pain points during the call. By the end of the conversation, you should know all of their primary business challenges and the underlying causes associated with them. Once you have an understanding of these key issues, you can better position your product or services to solve them.
- Create curiosity: Ask questions about their business. Ask more than tell. This conversation is about them and understanding their needs and problems. The less you talk about your business and product, the more your prospect will be interested to hear the final pitch.
- Wrap it up: Find a calendar time between 24-48 hours after the discovery call to book a follow-up meeting. Try this line: "Would you have 30 minutes to follow up this week? My

colleague, John, will join us — he's an expert in X, Y, Z. My calendar's open, what works best for you?"

9. Follow-up after a closed-lost deal.

Bryan Kreuzberger, founder of Breakthrough Email, sends a follow-up email if prospects respond with a rejection. The purpose of this email is simple: Learning. You can use this rejection as an opportunity to better understand how you can improve your sales techniques by sending this template:

Hi [prospect name],

Thanks for your email. I just closed your file. I have a quick question as a final follow-up. Why aren't you interested? Was it something I did?

If there is any way I can improve, let me know. I'm always looking for input.

Thanks for your help,

[Name]

Gmail labels for prospecting

For example, after an initial discovery call, he sends a follow-up to his prospects and labels their response according to the action required. This allows him to easily shift gears when contacting cold prospects versus re-engaging old prospects or moving warm prospects further down the funnel.

10. Thoroughly understand your vertical.

Sound prospecting is about identification and consultation — meaning you need to be able to identify prospects who will be receptive to your efforts and frame yourself as a consultative resource to almost-instantly build trust in your initial conversations.

Your ability to deliver on both of those elements starts with you thoroughly understanding the space you operate in. You need to know your vertical inside and out — the nature of the industries you serve, how companies within it generally operate, relevant technical jargon and concepts, and the most common issues the types of prospects you connect with run into.

That starts with thorough research. Once you start operating within an industry or serving businesses of a particular scale, get a pulse on the space's more technical aspects. Know how the products or services the businesses you connect with work — as best you can.

Also, learn industry-specific terminology that you can reference when talking with prospects. That will help establish you as an authority in your prospects' space — not just some random salesperson.

Additionally, get a feel for how your vertical has evolved by brushing up on its history — and stay abreast of industry trends via company blogs, industry-specific publications, or any other contemporary resources that give you perspective on where the space stands and where it might be headed.

Taking those kinds of strides will give you a more productive understanding of who you should be connecting with and what you can say to resonate with them.

11. Ask for referrals.

According to HubSpot's recent survey of over 1,000 sales professionals, 66% of salespeople say referrals from existing customers offer the best leads — and high-quality leads often become productive prospects.

By asking for referrals, you can generate a wider base of warmer, more easily convertible contacts — giving yourself a crucial leg up when prospecting. When an existing customer connects you with a referral, they're essentially saying, "I think this person could stand to gain from your solution."

In turn, you can go into your engagement with those leads knowing they're more likely to consider your offering than most cold contacts. You can also reference the customer who put you in touch with that lead when conducting your outreach — a solid conversation starter that lets you develop instant rapport.

So how do you ask for referrals? Well, obvious as this might sound, you just ask for them. When you convert a prospect into a customer, follow up with them and ask if they know anyone who might benefit from your solution.

If they don't know anyone straight off the bat or are reluctant to immediately hand out names, wait until they've leveraged your product or service for a while. Then, check in when you know they're happy with your offering. If they hit that point, they'll likely be willing to put you in touch with some contacts who will be willing to hear you out — especially if you offer them some sort of incentive.

With all of the steps and tricks involved in the prospecting process, you might find yourself spending too much time on menial tasks. Luckily, you can use sales prospecting tools to boost productivity and automate tasks.

Sales Prospecting Process

Let's say you've decided whom to pursue. Now, it's time to get even more granular and jumpstart the nurturing process — ideally resulting in a closed-won deal. Regardless of what your sales pipeline looks like, you'll typically go through the following phases.

1. Research

Effective prospecting begins by further researching the prospects whom we've determined are generally a good fit. The goal during this phase is to determine the quality of the prospect — how likely they are to make a purchase, based on factors like their budget and challenges.

You get there by evaluating the prospect using preset qualifying dimensions — a set of criteria to evaluate the probability that a lead or prospect will become a customer — and keeping track of your findings through a CRM.

2. Outreach

Once you've qualified the prospect, you need to reach out to someone at the business — once you've identified that contact, you can connect with them directly using a sales prospecting email.

In many cases, you'll have to deal with a gatekeeper — a company representative who essentially screens you before you can connect with someone with decision-making authority — like a personal assistant or receptionist.

Ideally, once you've worked your way past a gatekeeper (or multiple gatekeepers), you'll be put in touch with a decision-maker — someone who has the seniority and relevant authority to purchase products or services like yours — typically someone in the C-Suite or at the director level.

3. Discovery Call

After connecting with a gatekeeper, you're going to want to schedule a discovery call — a preliminary conversation with a prospect where you ask thoughtful, relevant questions to uncover a prospect's goals, interests, and pain points.

A discovery call is a unique opportunity for you to simultaneously understand and impress your prospect. Asking the right questions on your call can help you tease out the information needed to understand whether your offering suits their business — giving you a solid basis for an effective value proposition.

But an effective discovery call is more than a conversation for gathering intel — it's a chance for you to demonstrate your relevant knowledge and start building rapport with a prospect.

By asking thoughtful, articulate questions that speak to how well you understand elements like their industry or scale, you can establish yourself as a trustworthy authority in their space — right off the bat.

And by having a conversational, disarming conversation on the call — without sacrificing professionalism — you can plant the seeds of a productive working relationship with your prospect.

4. Educate and Evaluate

After your discovery call, you need to use the insight you gathered to evaluate and qualify the prospect's needs. This stage provides the basis for whether a prospect legitimately needs your solution, how viable a potential deal is if they do, and how to frame your value proposition — making it one of the most (if not the most) crucial steps listed here.

Here, you're going to consider two main factors — pain points and potential objections.

Pain Points

A company's pain points are the issues, concerns, or gaps in its operations that your product or service could remedy. With the information from your discovery call, you should be able to piece together what those aspects look like.

For instance, let's say you work for an edtech outlet that offers curriculum scheduling software. You've just had a discovery call with a midsize community college. During your call, you learned that it takes students at the school an average of three years to earn an associate's degree as opposed to two, leading to reduced enrollment.

You also found that classroom scheduling conflicts — stemming from the institution's existing curriculum scheduling system — are making required courses for popular majors fall by the wayside every semester.

With that in mind, you could piece those two bits of information together, identify degree velocity as a major pain point, and point to how your software can fix it — giving you the basis for an effective, concrete value proposition.

Objections

You also need to be mindful of potential objections your prospect might raise. Those can include elements like budget or time constraints. When preparing for this side of the process, make sure you thoroughly understand the pain points you identified and the state of the business in general.

Have a pulse on the company's current buying power, whether it legitimately needs a solution like yours, exactly how urgent that need might be, and the soundness of the rapport you've established with your prospect up to this point. With all of that in mind, try to account for the potential pushback that might stem from those issues.

Know your prospect's business inside and out, and when they raise objections, make sure you're specific in how you respond. Talk about how your solution will address their issues, don't just tout your product or service's features in general.

5. Close

At this point, you should have all the information you need. You know the prospect's challenges, pain points, and possible objections. Now, it's time to try to turn them into customers — to demonstrate and convey the value you can offer them. This will result in one of two outcomes:

Closed-won: When the buyer purchases a product or service from the sales rep.

Closed-lost: When the buyer fails to purchase a product or service from the sales rep.

From these two numbers, you can calculate your closing ratio — or the ratio of prospects that a sales rep closes and wins.

Sales prospecting process As you move through the process, you can typically engage with prospects one of two ways: either through outbound or inbound prospecting.

Outbound vs Inbound Prospecting

Sales, as a field, is constantly shifting, and naturally, how prospecting is conducted is shifting with it. Sales reps no longer have to choose between inbound or outbound prospecting — now, they have the flexibility to decide whether they want to incorporate elements of both into their efforts.

Outbound prospecting is when you reach out to leads who haven't yet expressed an interest in your product or business. You typically identify prospects through independent research — by finding them via LinkedIn, Google, or another platform.

Inbound prospecting is when you reach out to a lead who shows an active interest in your business or product. They've visited your website, subscribed to your blog, or maybe even submitted a form asking to speak to a sales rep. You then engage with them to understand whether they'd be a good fit for the product.

Before a salesperson even has a chance to contact a prospect, they're already over half of the way through the sales process. It's time companies and sales reps start helping the buyer rather

than selling to them by leveraging their context and understanding who they are and what they need.

But how do you do that? How do you find prospective buyers and learn the context surrounding their business needs? Even more importantly, how do you determine whether or not you should begin the process of selling to them?

You'll do this by asking a few basic sales prospecting questions.

Sales Prospecting Questions

Knowing who to pursue saves us a significant amount of time. Not every lead is fit to be a prospect, and not every prospect will become a paying customer. Luckily, you can ask a few questions that can help you determine whether a prospect is worth pursuing.

Even if you use outbound prospecting methods, you should see a much better response rate because you took care to vet their business for suitability.

Below are some qualifying questions and related takeaways to help you evaluate whether or not a prospect has a high probability of becoming a customer.

- Is the prospect's business an organizational fit?
- This type of qualification is based solely on demographics. Does the prospect fall within your territory? Do you sell in their industry? Does it fit your buyer persona?

Say your target market consists of small- to medium-sized businesses with anywhere from 100 to 1,000 employees. You should eliminate any potential customers outside of these criteria.

Diving deeper, your product or service will naturally provide higher value to a particular profile within that target market. For example, medium-sized businesses consisting of a larger team. Those customers are also more likely to upgrade to a higher tier of your product, providing more lifetime value as a customer.

Takeaway: Prioritize customers based on the size of the opportunity or their potential lifetime value.

Have you identified key stakeholders?

There are two types of people involved on the other end of your sales process: decision-makers and influencers.

Influencers may not have the power to buy, but they're often the ones that will be using the product and thus can become your biggest internal advocates. If you get them to rally around your offering, they can make a compelling case to decision-makers before you even speak with them.

Decision-makers are, of course, the ones that either approve or reject the buy. You can ask these questions to determine the decision-making process: Will anyone else be involved in this decision? Does this purchase come out of your immediate budget?

Takeaway: Keep a working list of influencers and buyers, perhaps mapped out by the organizational structure of the organization. You'll use this list later in the outreach phase.

Are the prospect's constraints a deal-breaker?

Time constraints and budget limitations are often the biggest objections you'll receive from prospects. Before wasting time on an exploratory call to hear this objection, do some homework beforehand to see if you can filter out potential buyers who clearly don't have the bandwidth to consider your offering.

Takeaway: If you see a prospect has just launched a new marketing campaign, they might not have the time to cycle through an extensive sales process. You should take note of prospects who clearly have their hands tied and revisit them at a later date.

Do you have familiarity with the prospect's market?

You're likely to be more familiar with certain types of companies, markets, or industries than others. Your pitch and sales techniques are also likely to be more refined with markets you feel comfortable talking about, so you should prioritize these prospects first.

Takeaway: Group similar prospects by characteristics such as their service offering, their market, or their industry, and prioritize these groups based on your familiarity with them.

Additionally, value-added prospects to whom you can provide more value are more likely to buy your offering. For example, if you're selling basic digital marketing services and you see that your prospect already has a robust web presence, the probability you can create tremendous additional value is low.

Another takeaway: Classify prospects by the level of value you think you can provide.

Do they have an awareness of your offering?

Your prospects will likely have varying levels of knowledge about your product or services. The more awareness they have, the more likely they are to see the value in your offering and become customers.

If a prospect has visited your website, subscribed to your blog, or posted content about something related to your offering, they probably know a lot about your company or service.

Takeaway: Group prospects by their level of awareness so you can take advantage of this familiarity later in the sales process.

Prospecting Email Examples

Ready to reach out to prospects? Use the following email templates to get started.

1. Reaching Out After a Referral

*[Name of referrer] recommended we connect
Hey [prospect name],*

It's great to meet you. Our mutual connection, [name of referrer], recommended I get in contact with you because [X].

I would love to hear more about what you do in your role — according to [name of referrer], it seems like you may be facing [X] challenges.

[Product name] can help you achieve [X] and increase efficiency by [X]%.

Is that a priority for your team right now?

Best,

[Your name]

2. Providing Links After They Downloaded a Resource

*More [specialty] resources for [business name]
Hi [prospect name],*

It's great to meet you. How are you enjoying [name of resource] so far?

I can see that you're interested in [X] and have compiled three more resources that will help your team do [X] better.

[Link 1]

[Link 2]

[Link 3]

In the meantime, I'd love to hop on a phone call and learn how your quarter is going so far. Are you available on Thursday morning for a 10-minute call?

Best,

[Your name]

3. Congratulating Them for an Award or Publication

Congrats on [award]

Hi [prospect name],

Congratulations on receiving [award]! That's a rare accomplishment — kudos to you and the team.

Now, to introduce myself, I'm a [title] at [company]. I work with small businesses in your industry to achieve [X] results. Just last week, [competitor] told me they finally reached their goal of [X], boosting their ROI to [X]%.

I'd love to chat and see whether we can get similar, if not better, results for you. Would you be available for a ten-minute call on Friday?

Best,

[Your name]

Prospect Marketing

Prospect marketing is a brand of content marketing a business leverages deeper in its sales process than most other types of marketing. It involves providing a prospect with media like sales collateral, technical documents, and other resources to help influence their decision-making as they move closer to closing.

You've successfully prospected a handful of potential clients. Now what? It's time to nurture those prospects with prospect marketing.

Prospect marketing is essentially bringing a prospect into the flywheel and closer to, well, Close. Just because you connect with a prospect doesn't mean you should stop all marketing efforts. Instead, your marketing should become more personalized and targeted.

If you haven't already developed sales collateral, work with your marketing and customer service teams to prepare these materials for potential buyers in each stage of their journey. Email templates, call scripts, and pre-call checklists are just a few of the tools to streamline the prospect marketing process.

Another prospect marketing strategy is creating workflows within a CRM. Workflows automate your marketing processes — including how you market to your prospects. Use Workflows to set up pre-written emails, SMS messages, or in-app notifications that are sent to your prospects

based on certain triggers, such as a video view, content offer download, or inactivity for a certain number of days.

In short, anything that keeps your prospects engaged with and educated about your brand is considered prospect marketing. Even a daily or weekly check-in with prospects counts. Again — just because you've connected with a prospect doesn't mean the marketing should stop.

Begin Sales Prospecting

Prospecting doesn't have to be a difficult and tedious process. In fact, it can be a positive experience for both sales reps and prospects. Adopt a few of the strategies we reviewed above into your workflow and experiment with different techniques and tools to see what works best for your team. Then, you'll be sure to begin converting more good-fit prospects into paying customers.