Baylor Business Development Competition (BBBD)
September 2021

You've recently begun working for MyLabsDirect (MLD), the testing and diagnostics company that has helped Baylor University continue in-person education efforts throughout the COVID-19 pandemic. So far, you've learned that MLD has the ability not only to do COVID testing but also general blood work. They are primarily focused on cash-based transactions (instead of pursuing insurance-based payments). Additionally, they own and operate their own CLIA-certified laboratories, allowing for quicker test turnaround times than industry standards.

To get up to speed and create success, you want to know what your firm can offer so the MLD website is very helpful: https://mylabsdirect.com/

Your supervisor asked you to develop a pre-call plan for three companies where your firm's products might be attractive. You are to identify the three companies from this list of firms:

3M, BMC, Patterson Dental,

Ethicon (J&J), PwC, UiPath,

BNSF Logistics, Crown, Emser Tile,

Fidelity Investments, Gartner Hearst, Paradox,

Paycom, Reynolds & Reynolds, Schneider Electric, Shaw,

Spectrum Enterprise, Stryker, Swingle Collins & Assoc., TKElevator

You should identify, but not contact, one specific prospect for each company. Using secondary research only, identify one possible prospect at each firm. Your supervisor wants a pre-call plan for the three contacts, a sample email for one contact, and a sample voice mail for one contact.

New to this Business Development role at MLD, you are learning how to identify the right kinds of companies and contacts for targeting. Your internship during college was also in business development where you passed leads onto the Inside Sales team. This role is similar in that no one provides you with sales leads. Additionally, you are responsible with creating both voice and email messages for making initial contacts (no one is providing you with scripts and templates).

BBBD: Pre-Call Planning

Submit Pre-Call Plans in a single word document before 8am, Sept 20 to Professional_Selling@baylor.edu

Pre-call plans are an important foundation for engaging with prospective customers. Pay great attention to proper formatting as that impacts your supervisor's perception of your work.

Competitors will prepare three pre-call plans (one per prospect); the people are real and the companies are real. But you MUST NOT contact anyone in real life. Use what information you gather about real people and real companies to develop a unique pre-call plan for each prospect, addressing:

1. Why did you select this company? Provide compelling rationale for EACH prospective company.
2. Who is the best prospect in each company (name, title, background information)? Why did you select each specific prospect? Provide compelling rationale for EACH person.
3. What is your objective or goal for a voice mail? For an email?
4. What benefits or points do you want to highlight in your messaging?
5. What are two possible objections (i.e., business issues) that you need to address up front?
6. How do you plan to close the conversation in email or voice mail?

The more unique the firms and prospects that you select the higher will be your score.

Rubric for PreCall Plans

10%	**Select 3 Firms for Prospecting**	*Appropriateness, compelling rationale for selecting each company*
25%	**Identify Target Prospect for Each**	*Appropriateness of person/title, compelling rationale for selecting each person*
10%	**Email Objective**	*Logic of the email's goal*
10%	**Voice Mail Objective**	*Logic of voice mail's goal*
10%	**Key Benefits Listed**	*Demonstrates clear understanding of benefits*
10%	**Objections and Responses**	*Identify 2 key biz issues company might face; how your company will address each*
25%	**Overall Quality of Precall Plan**	*Maximum impact with fewest words possible (word economy)*

BBBD: Email

Submit Email on September 20 between Noon & 5pm to Professional_Selling@baylor.edu

Rubric for Email

25%	**Compelling Subject Line**	*Compelling, informative, unique*
15%	**Objective of Message**	*Clearly understands the objective for contacting the buyer*
25%	**Benefits/Compelling Information**	*Highlights 3+ value benefits; shares compelling info w/buyer)*
10%	**Concise**	*Maximum impact with fewest words possible (word economy)*
10%	**Overall Tone**	*Conveys a feeling that appropriately connects with the buyer*
15%	**Closing/Call to Action**	*Uses strong closing (summarizes points; accomplishes goal)*

BBBD: Voice Mail

Leave Voice Mail as if it is your prospect's VM by calling 254-710-4246 during your time (below).

Rubric for Voice Mail

25%	**Introduction/Background**	*Compelling, informative, unique*
15%	**Objective of the Call**	*Clearly communicates the objective for contacting the buyer*
25%	**Benefits/Compelling Information**	*Highlights value benefit(s); shares compelling info w/buyer*
10%	**Length (< 1 minute)**	*Maximum impact with fewest words possible (word economy)*
10%	**Overall Tone**	*Conveys a feeling that appropriately connects with the buyer*
15%	**Closing Conversation**	*Uses strong closing (summarizes points; accomplishes goal)*

BBBD: Competition Actions

Submit Pre-Call Plans (single word document) before 8am on September 20 to Professional_Selling@baylor.edu

Submit Email on September 20 between 12pm -5pm to Professional_Selling@baylor.edu

Leave Voice Mail as if it is your prospect's VM by calling 254-710-4246 during your time (below).

Voice Mail Competition Slots

Sept 21, 8:00 – 12:00	Arreola Bass Bass Beattie Bello Benavides Bissell Black Boehme Boyce Byrne Carlson Chao Chavez Clark Compton Corts Crump Cruz-Maldonado Cunningham Curlin delaTorre Ermentraut Fernandez French Galbraith Galbraith Ginaven Goehring Gosnell, Hales Hartoonian Henderson Hernan Hernandez Hernandez Jackson Kechter Kerim Kleiner
Sept 21, 12:00 – 5:00	Kresta Larson Lyttle Maldonado McClelland Mellergaard Miller Morrow Mouton Myers Nacario Nopper Ochall, Palermo Paschke Pound Rajwani Reyes Rhoades Roper Scaff Schaff Schaff Scott Slattery Smith Smith Smith Spears Temple Thomas Tobben Treese Trevino Valdez Walton Ward West Whitaker Wyatt

THE ART OF COLD CALLING AND THE SCIENCE OF CONTACT RATIOS

Kraig Kleeman
Chairman of The Blaire Group
Blairegroup.com

Ken Krogue
President, Founder &
Chief Strategy Officer
InsideSales.com

is. | insidesales

Creating Optimal Cold Calling Scripts

Sales people Ought to Persuade

Most sellers embrace a language and a process that is decades old and void of best practices. In particular, this language is void in persuasion.

To counteract this, sales people ought to be equipped with scripts that persuade. Not unlike actors in a play, salespeople ought to run lines, rehearse, practice and they ought to be held accountable to include systems and methodologies that will persuade.

Many companies masterfully deploy exceptional product development processes. Sadly, companies rarely deploy an equally sophisticated selling apparatus.

Remember
If cold calling is about anything at all it's about the art and science of persuasion.

Proposition Cold Calling

The following example to the right is a script for cold calling that a team that The Blaire Group worked with used.

Who They Targeted
Chief marketing officers and senior marketing executives of large insurance companies

Their Product
Enterprise class software solution that was in the area of an agent portal software solution

Results
For 12 months, they scheduled 250 net-new briefings generating $3.5M in forecasted revenue

Why it Failed
It was ineffective because it incorporated value proposition language

VALUE PROPOSITION SCRIPT

Admin: Hello, this is Mr. Williams' office.

Seller: Hi, this is Joe Smith from Global Enterprise Systems (GES). Is Mr. Williams available?

Admin: No, he isn't.

Seller: I'd like to schedule a 30 minute meeting with him. Can you help me with this?

Admin: Maybe. This is Jane, his assistant. What is this regarding?

(This is where it all breaks down, when he introduces the value-proposition language.)

Seller: I'd like to introduce him to GES, specifically our agent portal software solution. I'd like to share with him how we saved Zurich International Insurance Company $1 Million last year.

Creating Optimal Cold Calling Scripts

Lead-with-Research Cold Call

Executive buyers respond to research that is relevant to their professional mandates. By incorporating this mindset and applying it to a sales script positioned at the target audience, sales teams will get very different results.

How To
It's critical that the research aligns perfectly with the outcome of the product or service that you want to get them interested in.

Results
The team, in a 12 month period, scheduled and completed 1,680 net-new briefings which generated $30 million forecasted revenue.

Click here to see the detailed results

LEAD WITH RESEARCH SCRIPT

Prospect: Hello, this is Bob Williams. May I help you?

Seller: Oh, hi Bob. This is Kevin Johnson with Corporate Systems. Good morning. I noticed that you downloaded our white paper entitled "Optimizing Social Media to Drive Brand Awareness." Do you recall requesting that white paper?

Prospect: Yes. It was very helpful. Thank you so much.

Seller: Great! What was your purpose for downloading the white paper?

Prospect: We are interested in doing social media monitoring in a more formal way. We wanted to hear what you folks have to say about it?

Creating Optimal Cold Calling Scripts

Unproductive Warm Call Follow-Up

A common mistake we see senior VPs of global sales making is hiring someone for an inside sales management role whose primary experience has been with inbound warm leads, but assigning them to work on outbound cold calling.

The following is an example of a warm call presentation gone wrong, but is fairly common within the industry.

First
The first thing that went wrong here was the ineffective, "Do you have a minute?" No one has time for the interruption of an unsolicited sales cold call. While it's important to be polite and show respect, unfortunately this over emphasis on politeness is at the expense of persuasion, leaving the call ineffective.

Second
When the lead said, "No, go right ahead. Check in with me sometime," this was code language for never call me again.

Result
This is a squandered lead because the seller did not have the discipline of persuasion.

INEFFECTIVE WARM CALLING

Prospect: Hello, this is Bob Williams. May I help you?

Seller: Oh, hi Bob. This is Kevin Johnson with Corporate Systems. Is this a good time for you? Do you have a minute?

Prospect: Well, I guess I have a minute. What's up, Kevin?

Seller: Well, I noticed that you downloaded our whitepaper "Optimizing Social Media Monitoring to Improve Brand Awareness." Did you find that whitepaper informative and insightful?

(Phrases like this are irrelevant and violate the rules of persuasion).

Prospect: Yes, it was very helpful. Thank you so much.

Seller: Great! Is there anything else that I can help you with? Do you need anything else from us?

Prospect: Nope. I'm good for now. Thanks, so much.

Seller: Well, great Bob. Listen, would you mind if I check in with you from time to time to see what's happening, or if you need anything else from us?

Prospect: No, go right ahead. Check in with me sometime.

Creating Optimal Cold Calling Scripts

Warm Calling Done Right

A successful warm call presentation should be productive and should not squander a lead. By leading the target to talk about their purpose, a sales rep can adopt these principles.

By asking your prospect about their purpose the target begins to open up. Additionally, qualifying with open ended questioning allows sales reps to use a "Three Deep and Down" campaign.

How To

To execute a "Three Deep and Down" campaign, start by discovering the target's values. Next, qualify and seek to understand. Last, sales reps then have the opportunity to land and expand.

By adopting this strategy, companies experience off the chart conversion rates.

EFFECTIVE WARM CALLING

Admin: Hello, this is Mr. Williams office.

Seller: Hi, is Mr. Williams in?

Admin: No, he isn't.

Seller: Do you keep his calendar?

Admin: Yes, I do.

Seller: Oh good. This is Joe Smith with Global Enterprise Systems and I'm calling to schedule his 15 minute analyst discussion. I plan to accomplish this no later than Friday of next week. I have availability on Tuesday in the morning, or Wednesday in the afternoon. Which works best for him?

The Seven Rules of Cold Calling

In 2007, the Lead Response Management research study changed the industry and showed how fast a lead cools off or how fast you need to respond.
Download the LRM Study

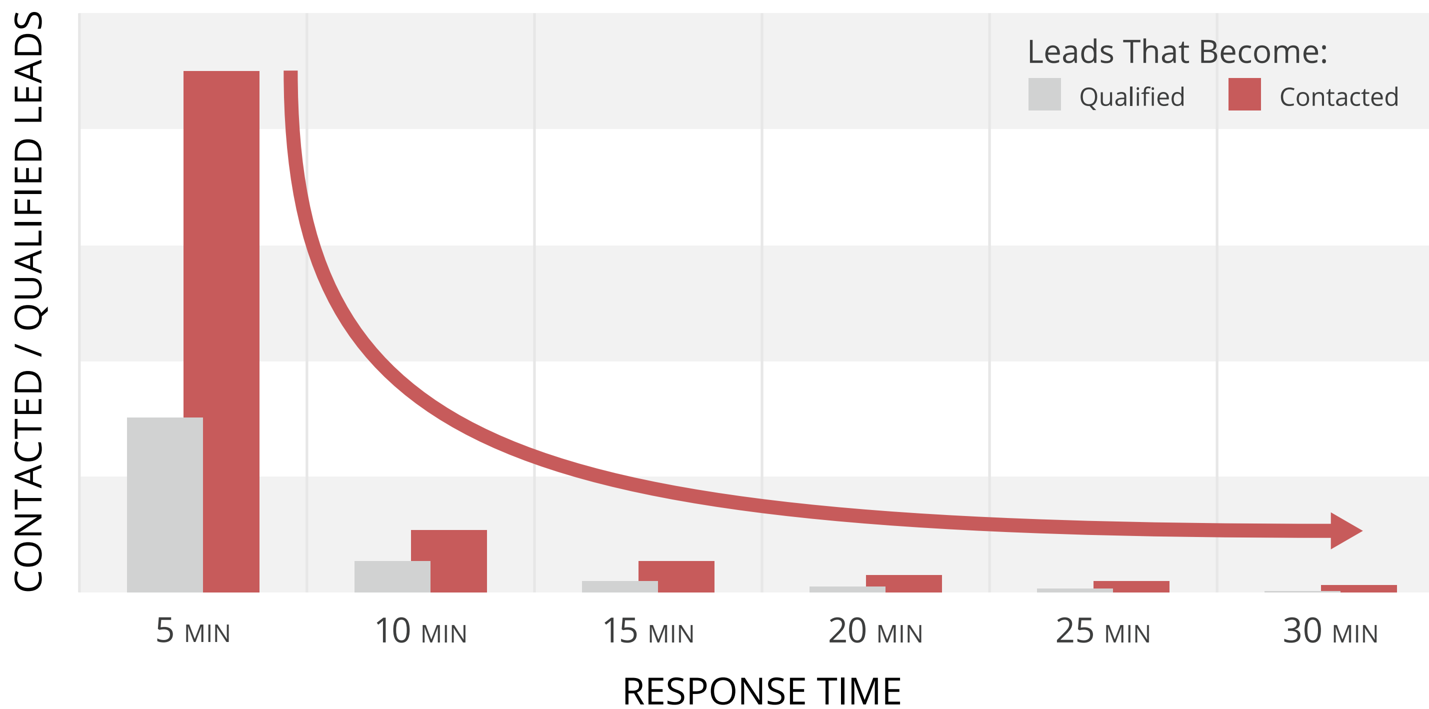
In 2011, another study done in conjunction with Dr. Oldroyd that was ten times larger found similar results and was published in HBR and INC.

Rule #1 – Immediacy

Best Practice
Contact leads within 5 minutes.

The odds of a sales rep actually contacting and qualifying a web lead drops a hundred times from waiting thirty minutes.

CONTACTS MADE FROM FIRST DIALS



WITHIN 5 MINUTES

100 X Higher chance of contacting
21 X Higher chance of qualifying

AFTER 5 MINUTES

Contact rates drop significantly

The Seven Rules of Cold Calling

Rule #2 – Persistency

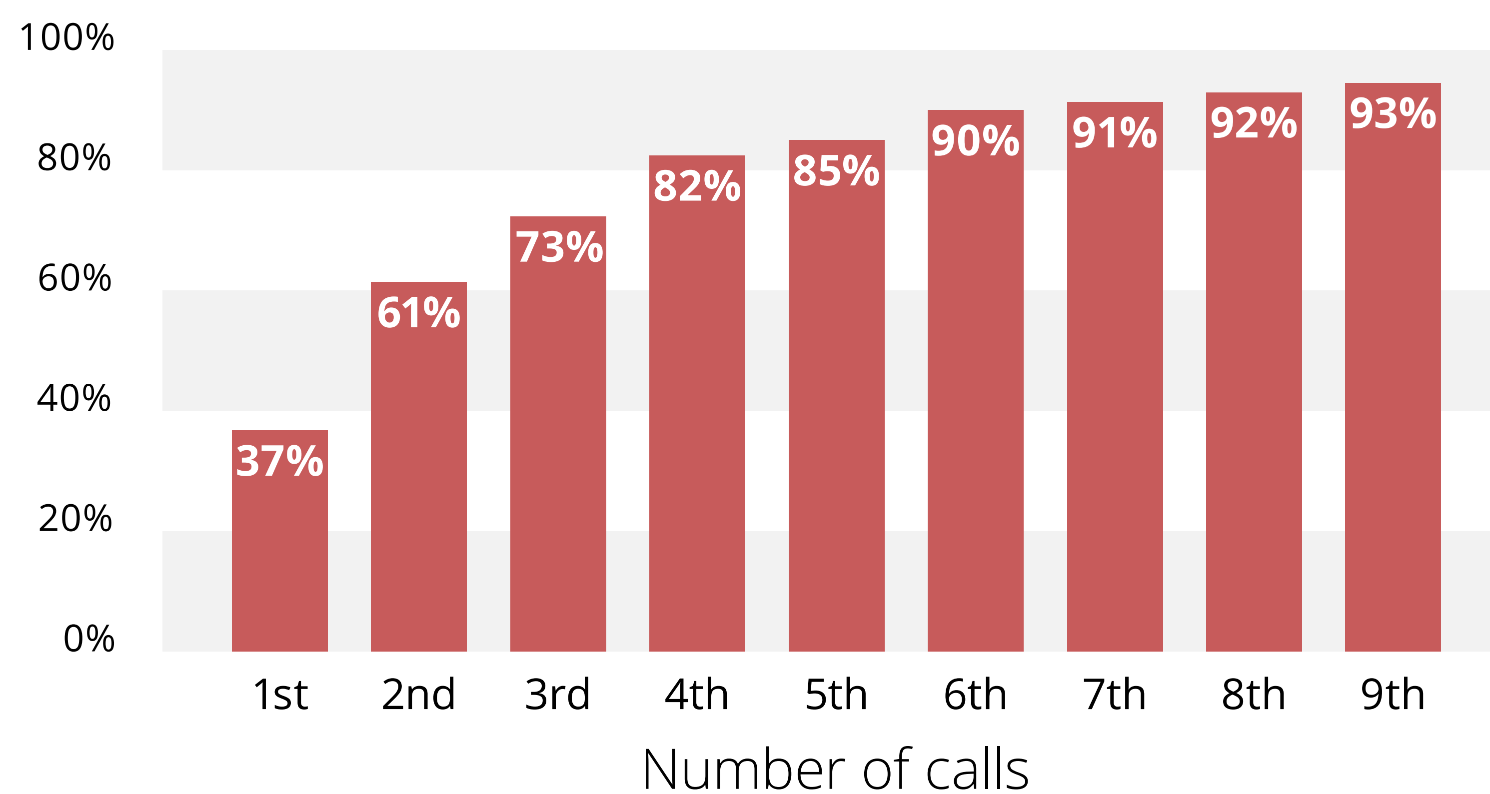
Best Practice
Sales rep should make 6-9 calls before giving up.

Reality
Most sales reps are making one or two calls per lead before giving up.

Think about that
If the contact ratio is between 10 and 11 percent and the sales rep is only make one or two calls, they're only going to reach 10 or 20 percent of the people they want to talk to.

Tip
Make sure that your sales reps are wringing the most value out of their leads as they possibly can and are not leaving money on the table.

PERCENT OF SALES BY CALL ATTEMPT



Based on internal InsideSales.com research

The Seven Rules of Cold Calling

Rule #3 – Optimize

A few years ago, InsideSales.com was doing a research study with FranklinCovey. Their reps were calling people back immediately when they were abandoning the sales process half way through, only to experience the leads getting upset with them for calling.

Their reps called a few of these individuals back on a later date and surveyed them. This is what they said, “I was halfway through buying a day planner and I forgot my credit card. I didn’t have it with me. I didn’t want you calling me – I just went and got my card.”

Tip
Put a field on your webform that says, “When is the optimal time to call you?” If the lead wants you to call, they will tell you when the best time to contact them is.

The Seven Rules of Cold Calling

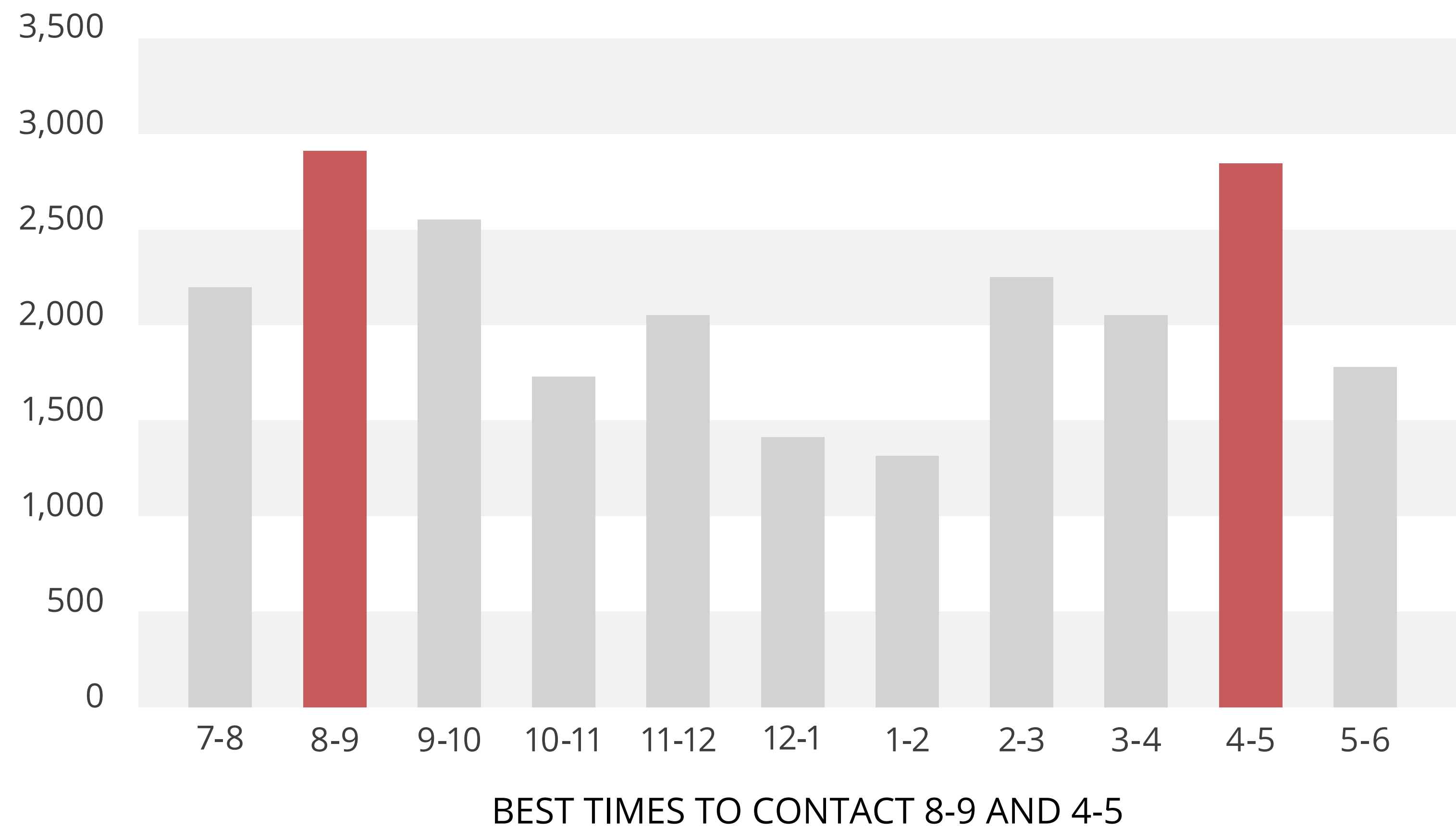
Rule #4 – Time of Day

Assuming you're calling into your same time zone (if not, then adjust accordingly) the best times to dial are between 8:00 and 9:00 a.m. or 4:00 to 5:00 p.m.

If you call during these times, you're going to have much higher contact ratios than if you're calling around lunch time.

What This Means for Business
If your morning sales team meeting is at 8:00 a.m., you're wasting the best calling time of the day!

CONTACTS MADE FROM FIRST DIALS



The Seven Rules of Cold Calling

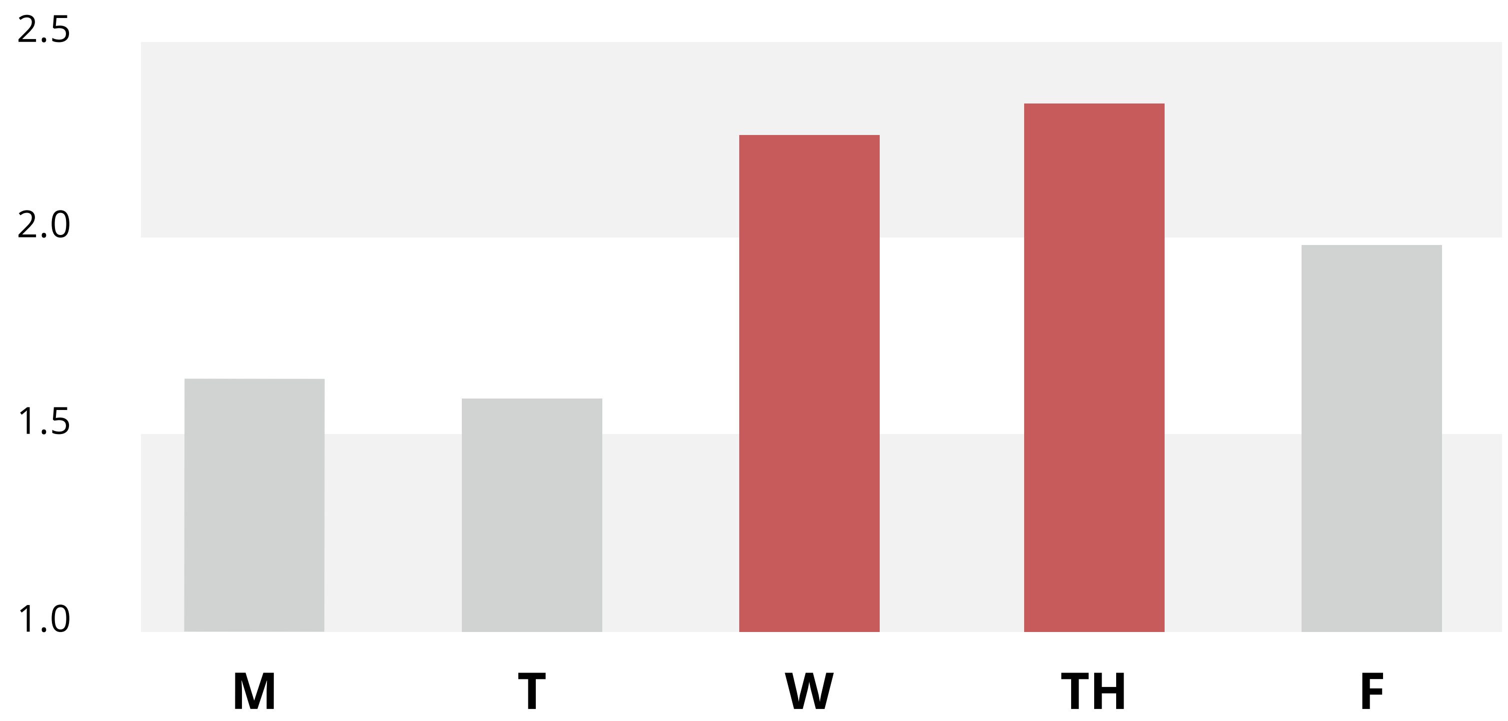
Rule #5 – Day of Week

In addition to the best time of day to call, the study also revealed the best days of the week. Tuesday is the worst day to be calling. Thursday is the best.

Why
Most people go into work on Monday and then get slammed from everything that came in over the weekend, only to spend all of Tuesday digging themselves out. By Wednesday, they're ready to talk to people again.

Tip
Do some testing and figure out the best days of the week for your target industry.

INITIAL DIAL TO LEADS THAT BECOME CONTACTED



The Seven Rules of Cold Calling

Rule #6 – Get Direct Dial Numbers

Do your best to find the desk phone or cell phone number of the prospects you are trying to reach.

Take a look at rep number six with an average of 33 appointments per month. Vorsight went into the sales reps' database and found 97.6 percent of the sales reps' personal data base included direct dials. The results of rep number six's efforts were triple that of rep number one's.

The good news is that this is mostly a technique, not even a technology. Teach your sales reps the importance and impact direct numbers can have.

REP	AVERAGE MEETINGS PER MONTH (LAST 3)	% DIRECT LINES ON CONTACT LIST
1	11	51%
2	13	45%
3	20	76%
4	22	74%
5	29	87%
6	33	97.6%

Source Vorsight

The Seven Rules of Cold Calling

Rule #7 – Local Presence

If I call you from San Jose, California, area code 408, and you live in New York, area code 212, you probably aren't going to answer my call.

However, if I call you from a number with area code 212, you're probably going to answer the phone.

The odds of your prospect answering is 57.8 percent higher if the call is from their own, local area code verses a blocked, toll free or even a long distance number.

How This Impacts Cold Calling Efforts
If you have ten sales reps and you boost their productivity by 57.8 percent with InsideSales.com's LocalPresence, it's the equivalent to hiring six additional full-time sales people.

BEST

57.8%

MORE LIKELY TO ANSWER PHONE

FROM A LOCAL NUMBER

TOLL

TOLL FREE

BLOCKED

WORST

Brought to you by:

HubSpot Sandler Training breakthrough EMAIL

The Emails

We’ve provided context around each email so you know how to best use each one. We suggest you use the templates as a starting point and tailor each email to your prospects’ context. Don't send these emails as they are—personalization is key.

Use the navigation bar below to jump to the type of email template you need.

First Touch Emails

The “Land a Meeting with Anyone” Email That Works 9 Out of 10 Times

Scenario: You’re trying to find the decision maker in the company
Contributor: Bryan Kreuzberger, Founder of Breakthrough Email

This first touch email leverages existing corporate hierarchies to schedule your first meeting. Nine times out of ten, this template is all I need to book a meeting.

Appropriate person

Hi [NAME],

I am writing in hopes of finding the appropriate person who handles [DEPARTMENT I.E. MEDIA]? I also wrote to [PERSON X, PERSON Y, AND PERSON Z] in that pursuit. If it makes sense to talk, let me know how your calendar looks.

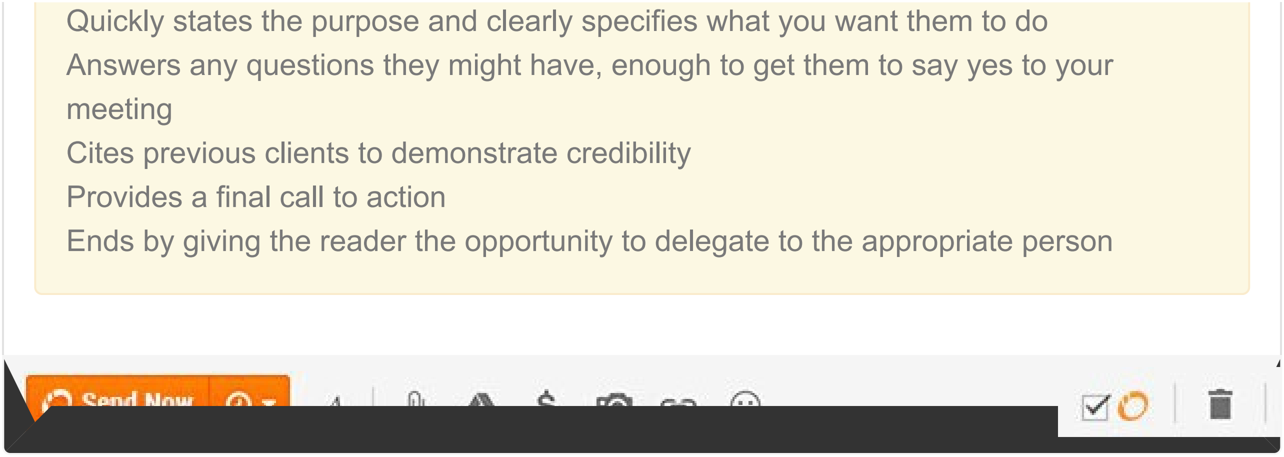
VoodooVox helps increase the revenues of Fortune 500 companies by marketing to Spanish-speakers. Each month we reach 25 million Spanish speakers with an audio message they must hear. We insert 30 second audio and SMS advertisements into phone calls made on calling cards. The benefit to users is they make their call free. The benefit for our clients is they can increase store revenue by providing text message coupons. Typical redemption is 3%. You can measure results online and with store sales. Advertisements can target specific ethnic groups and geographies. Some clients include Burger King, P&G and Chili’s.

If you are the appropriate person to speak with, what does your calendar look like? If not , who do you recommend I talk to?

Thanks,
[Signature]

What this email does well:

Has a short and intriguing subject line



First Touch Best Practice: Email Back Strategically

Scenario: Your prospect emails you back with a ton of questions
Contributor: Rachel Miller, Sandler Training

When we receive inquiry emails, we often find they are loaded with questions. For instance: “How much does it cost?”, “What kinds of services do you offer?”, “Yes, I did request that white paper—now how do I take the next step?”, “What can you tell me regarding how you might be able to help my company?”, “Could you send me a list of the different products that you have and their pricing?”

These questions are a good thing. The prospect, interested in learning more, reached out and started a conversation. But, as you’ve probably discovered, trying to answer all the questions through email just results in an ineffective volley of hollow emails that bounce back and forth indefinitely, and make it nearly impossible to close an initial sale. In many cases, these back-and- forth emails are not even an effective way of selling after the person has become a customer!

When the email comes in, you have a few options on how to deal with it. You can wait to address it. You can send an email reply. Or you can call the person directly.

As a go-getter, your first instinct might be to pick up the phone and dial the number immediately. Resist that urge.

When prospects make this type of inquiry, we suggest you respond by email first without answering ALL of the questions. It’s okay to volley the conversation back and forth a few times over email, so long as you don’t send too much or inaccurate information.

Remember, your goal should be taking the conversation offline, not on closing a sale through email. The point bears repeating: If you try to close via email, you’ll likely get stuck in a confusing and frustrating back-and-forth cycle with a prospect’s who’s probably getting frustrated, too. Another problem, of course, is that if you give a great deal of information via email, you fall into the traditional (ineffective) selling approach of premature presentation. Prescribing a solution to your prospect's problem before you properly diagnose it is sales malpractice.

Frequently, your call will go right into the prospect's voice mail and get lost in the clutter. If that happens, your odds of having a meaningful conversation with the prospect decrease drastically. If the prospect wanted a phone conversation right away, she would have called you instead of emailing!

What if you had simply responded through email with something like this?

"Hi Mary, thank you very much for thinking of us. Would you mind if we took this conversation to the phone?"

A message like that will substantially increase your odds of closing the sale with Mary. She knows you've seen her phone number at the bottom of her email. But even if the contact phone number isn't there, you'll find that prospects frequently respond positively when you ask for permission to speak on the phone. Prospects will say, "Yes, that's fine. You can reach me this afternoon at 123-456-7890."

One reason this works is that even though you could have called Mary, you didn't. Therefore, you don't appear to be needy or unsuccessful. Rather, you're portraying an attitude of experience and success. You demonstrated respect for the boundary the prospect created by using email, and you didn't come off as desperate. People love to do business with successful people, and this approach helps create that impression.

Of course, what you write in your initial email response depends to some extent on what the prospect said or asked you. Let's imagine Mary sent you an initial email loaded with questions, and she expects some answers in your response. You can try using what we call a "reverse" – a response that answers a question with a question – in your email.

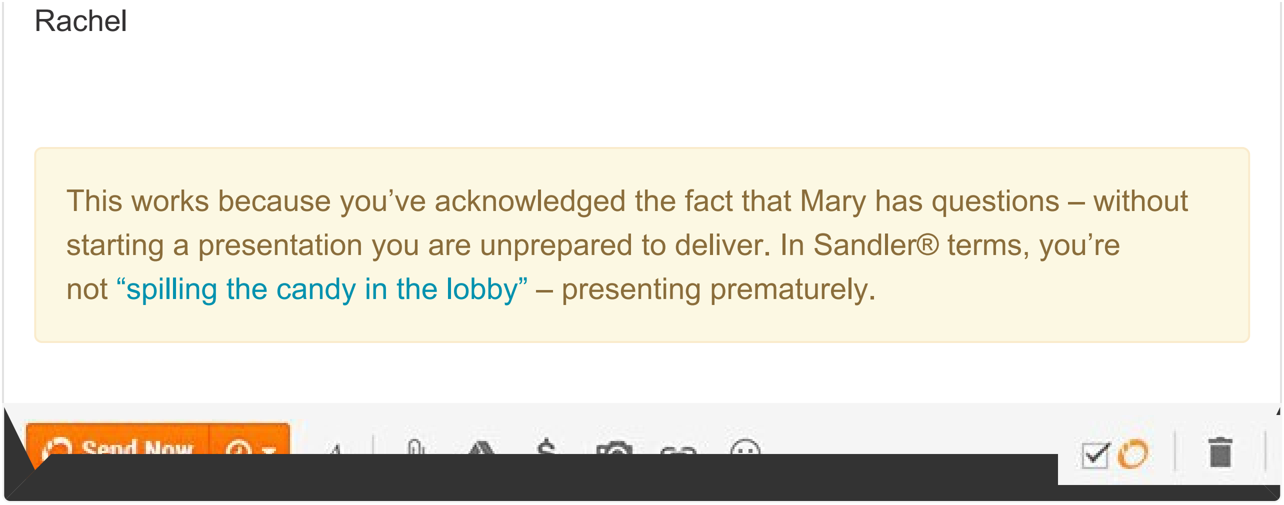
For example:

to answer your questions

Hi Mary,

It's very nice to hear from you! Thank you very much for thinking of us. I appreciate the questions. There are a couple of possible answers to your questions. I want to be sure I'm giving you accurate information. Would you mind if we spent just 10 minutes over the phone?

Warmly,



Rachel

This works because you've acknowledged the fact that Mary has questions – without starting a presentation you are unprepared to deliver. In Sandler® terms, you're not "spilling the candy in the lobby" – presenting prematurely.

Note the strokes and softening statements before the question. That's what effectively reversing a question in an e-mail looks like. Instead of listing features and benefits, you answered her question with a question of your own. Why? Because getting her on the phone will help you more effectively understand her situation and discover her pain, which is the true reason for her email. Additionally, verbal communication gives you a much better opportunity to build rapport, an essential prerequisite to effective communication… and to closing the sale.

In some cases, you may decide to answer some of her questions when you are sure that there is no risk in answering those queries. In this situation, you're not giving away information that will help Mary to "shop you" against competitors. Instead, your answers will help you establish enough rapport to get a phone conversation.

For example, let's say you are in the computer network support business and you feel it's safe to answer a question like this: "We have local area networks and use some cloud-based applications. Can you support a network like that?"

Your email might both respond and reverse:

"Hi, Mary. Thank you so much for thinking of us. Yes, in fact, we do support local area networks as well as the cloud. Could you be kind enough to tell me a little bit more about your project?"

With her initial questions answered, Mary will likely respond with some more information and probably a few more questions of her own. At this point you've established some rapport, so you would answer with:

"Thanks again for reaching out. I want to answer all your questions, and I also want to be sure I'm giving you accurate answers. So, I have a few questions I'd like to ask you. Would you mind if we took this conversation to the phone?"

In all likelihood, when you send this, you won't look as a tiger prowling in the grass for prey, but as a conscientious person struggling a bit, and trying to do a good job. Often, the prospect will agree to the phone call.

The "Congrats On the New Role" Email That Got a Prospect to Ask for a Meeting

Scenario: When you learn that the prospect is new in their role
Contributor: Caroline Ostrander, Business Development Rep at HubSpot

Caroline saw that a prospect had just started in their role and decided to reach out to immediately build rapport. The result? The prospect ended up asking her for a meeting.

congrats on the new role. re: call follow-up.

Hi [Prospect],

Just left a quick message at the office for you. I chuckled a little bit when I got an automated email this morning from your predecessor, [NAME OF PREDECESSOR] who we worked with briefly, and before him, [OTHER FORMER COWORKER NAME], who we worked with as well.

First and foremost, congrats on coming into this new role! I'm sure you've got a lot going on - so this conversation might be timely or not. If you're stressed, this is my go-to :)

My role here is working with businesses (in the area) on how they can effectively and efficiently drive more traffic to their website, increase conversions, and nurture leads into customers.

How has your first month kicked off so far?

- Caroline

What this email does well:

References previous efforts trying to help the company and mentions his co-worker's names
Leverages a trigger event of her prospect getting a new job

Relates to the prospect by suggesting that taking a new role is stressful
Very lightly introduces her expertise
Does NOT ask for a time on his calendar and instead asks an open-ended question designed to get a response

First Touch Best Practice: Unveil The Wizard

Scenario: You're trying to identify your prospect's interest
Contributor: Rachel Miller, Sandler Training

Prospects will often use email to put the salesperson in a subservient position, and at a distance, making it difficult to move them through the sales pipeline. How do we change this dynamic? The answer comes from a classic Hollywood film.

Do you remember the fellow in the movie The Wizard of Oz who hid behind the curtain? That's right: The Wizard! The curtain protected him and made him seem pretty scary as he pulled levers, making lights flash and thunder roar. People were scared and intimidated. When he finally got out from behind the curtain, though, he became easier to deal with, and more human.

If we're not careful, email exchanges can create a kind of "Wizard Syndrome". As long as prospects hide behind a curtain of emails, they seem distant, mysterious, and all-powerful. Once the curtain comes down, though, the conversation becomes a lot more substantive.

Follow Up Emails

The "Still Interested?" Email That Closed a $100,000 Deal with a Client That Went Dark

Scenario: When a prospect goes dark and you get a notification showing they might be interested again
Contributor: Mack McGee, Executive VP & Principal at Groove

Mack McGee was sure he would land a contract with a prestigious client, but they suddenly fell off the map. After multiple follow ups and no response, he gave up. Nine months later, he received a HubSpot Sales email tracking notification indicating that this lead from nine months ago had reopened his last email. Mack sent him the follow-up email below which ended up closing a $100,000 deal he thought he had lost.

Still interested?

{CONTACT.FIRSTNAME},

Hope all is well. I had put a reminder in to check-in with you to see how things were going with the [NAME OF CAMPAIGN] initiatives. We had discussed a potential partnership a few months ago, but hadn't been able to formalize our recommended engagement.

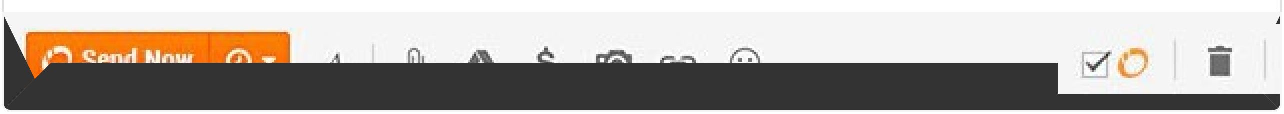
We would love to catch up and see if there are any opportunities to engage with you and help with your [DEPARTMENT (eCommerce, marketing, etc.)] strategy. Let me know if you have some time to reconnect this week and catch up business owner to business owner on where you see things and I can provide some ideas on where we can help.

Look forward to hearing from you.

{CONTACT.OWNER_NAME}

What this email does well:

References a campaign initiative the prospect shared with him
Reminds the prospect of what they discussed before
Focuses on finding a way to help them, not finding out if they want to buy



The "I Just Called You" Email That Gets an 80% Response Rate within 24 Hours

Scenario: After leaving a voicemail
Contributor: Colleen Francis, Owner of Engage Selling Solutions

You tried calling, but your prospect didn't pick up. To improve your chances of hearing back, send the follow-up email below immediately after leaving a voicemail and specify a specific date and time for the next call.

This works because clients aren't always at their desks to take calls. The email is short and directive, making it easy to read and respond to. Prospects can answer with a short response from their phone. The email has an 80% response rate within 24 hours.

Sorry I missed you

Hi (Name),

Sorry I missed you on the phone today, I was calling because…. (leave a one sentence reason for your call, or the name of the referral / event that introduced you)

In my voice mail, I mentioned that I will call you back on [DATE] at [TIME] and of course you can always reach me before then at [YOUR PHONE NUMBER].

I look forward to connecting.

Cheers,

[YOUR NAME]

What this email does well:

Shows the prospect that you follow through
Gives the prospect the option to get back to you via email instead of calling back
Let's the prospect know when you'll follow up again

Follow Up Best Practice: Craft Email Messages That Build Better Rapport

Scenario: You want to build trust with your prospect

Contributor: Rachel Miller, Sandler Training

There are a couple of things you can do to support good rapport as you try to convert the email exchange to a phone conversation.

When an email comes in, and you're ready to respond, mirror and match the way your prospect wrote the email. In other words, if the prospect sent an email in green font, match the color. If the message is written with large letters, reply in large letters; if it's in small letters, reply in small letters—match the font size.

If the email is personalized, be sure to personalize your reply in the same way. If the email is more cryptic — for example, if they don't even say "Hi Greg" or "Dear Greg" — then eliminate your greeting as well. Additionally, match the way the prospect closed the email. Perhaps she wrote, "Thanks," "Sincerely," or "All the best." Use your email to do the same.

Mirroring and matching is a great technique for establishing bonding and rapport. People buy from people they like… and people like people like themselves. If you can establish some rapport before you even get on the phone with the prospect, you'll be that much closer to figuring out whether there's a problem you can solve… and that much closer to closing the sale.

Here's another concept that works well to create rapport: Respond quickly! Remember this Sandler principle: "Time kills deals." Because email is a time- sensitive medium, responding quickly will always be seen as a good thing by the prospect. It helps inspire the person to converse with you on the phone as they perceive you as a no-nonsense person who is "on the ball."

The "Learn More" Email That Opens Up The Dialogue for Another Conversation

Scenario: When your first conversation didn't uncover a lot of information
Contributor: Dave Kurlan, CEO of Kurlan & Associates, Author of Baseline Selling

If your first conversation didn't uncover a lot of information, you can open up the dialogue to speak more about their challenges using this email.

Email Title

Hi [NAME],

Thanks for taking the time to share a little about [COMPANY], as well as the goals and challenges you face.

If you would like to learn how other companies are dealing with challenges like yours, I would be happy to schedule a call. We could also talk a bit more about your challenges and determine whether or not I might be able to offer some help.

If you would like to talk some more, use the convenient link below to directly schedule a time on the calendar for us to speak.

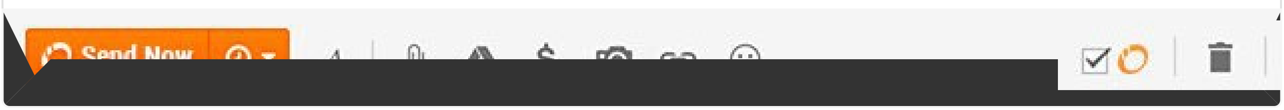
[Link to calendar created using Meetings Tool]

Best,

[YOUR NAME]

What this email does well:

Focuses on making sure you can help them instead of selling
Makes it easy for them to get in touch and schedule a meeting



The “Next Step” Email That Creates Urgency

Scenario: When you don’t know the next step
Contributor: Bryan Kreuzberger, Founder of Breakthrough Email

You might’ve gotten a response to your email, or got on a call, but didn’t set up the next steps to keep the conversation going. These two emails can help you get back on track.

Update?

[Name], I’m writing to follow up on our last conversation. My boss asked me for an update on your account. I told him I didn’t have one.

I’m not sure what makes sense to continue the conversation. What makes sense as a next step, if any?

[Signature]

What this email does well:

Creates urgency
Makes a clear request for next steps
People can relate to having a boss and needing to provide answers to their questions
Avoids selling the person and instead gently pushes the person for input and to set up the next step

Follow Up Best Practice: The Problem Statement Format

Scenario: You're trying to find a way to structure your sales email.
Contributor: Bryan Kreuzberger, Founder of Breakthrough Email

Many sales emails aren't clear and don't get the desired response from a prospect. This problem statement structure is a format you can use so your prospect understands what you are requesting.

Here are the 5 elements of the problem statement structure: (1) Now, (2) But, (3) What, (4) Why, and (5) How.

Problem Statement Structure

- Current situation: What are the facts? What happened?
- But, something changed: What changed?
- The problem: What's the problem?
- Motivation: Why does the reader care? What's in it for them?
- How do we fix it: What action do you want them to take?

Here is a sample we used for our email newsletter following this format:

How does money work?

Hi there,

Tony Robbins referred me to a video on how the economy works, and more specifically how money works. We talked about it on our coaching call today, so I wanted to share it with you.

The economy is complicated. The video by Ray Dalio, the founder of Bridgewater, the world's largest macro hedge fund with $122 Billion in assets, shares the principles behind:

The future of the housing market.

How to decide if we are in a downward spiral or it's time to invest.

How to get paid more in your job or your business.

Bill Gates said, "This knowledge would help everyone as investors and citizens. Watching is a worthwhile 30-minute investment."While I'm not generally interested in financial issues, this video changed the way I see how the economy works. You can watch the video here.

Thanks!

Bryan Kreuzberger, Founder

BreakthroughEmail.com

We used the problem statement format for the instructions of this email template.

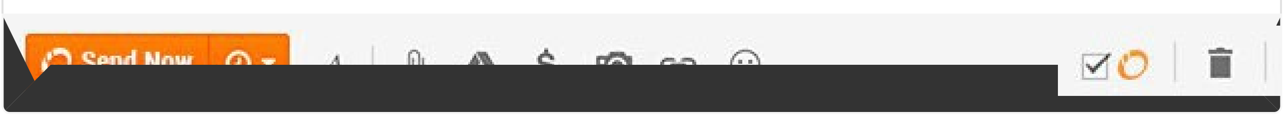
What are the facts? What happened? Many emails aren't clear and don't get the intended response.

What changed? It's not the writing, it's the organization of the ideas.

What's the problem? You can use a simple structure so readers understand

Why does the reader care? Your writing will be clear, concise and people will understand.

What action do you want them to take? Learn the problem statement structure.



The "Curious Why You Didn't Buy" Email That Increased

Conversion Rates by 1,100%

Scenario: When you give a demo but the prospect doesn't purchase
Contributor: Amanda Holmes, CEO Chet Holmes International

This template was created when Amanda didn't see the sales she expected after one of her webinars and was trying to figure out why. So she decided to ask.

This email converted more sales than all of her other webinar follow ups combined and increased her conversion rate by 1,100%.

Email Title

Dear [PROSPECT],

I noticed that during the "double sales training" you didn't purchase the "Institute" product at the end. And we'd love to know why.

I have no intention of trying to sell you anything, but we do want to make sure that we're hitting the mark with our customers.

Any feedback you can give us would help.

Were you not clear on what you were getting? Is there somewhere else in your business that you need to focus? Was it too expensive? Or is your business smooth sailing?

If you respond we'll send you a pdf on Dialing for Dollars - Chet's checklist for influence over the phone to thank you for your time spent. Please respond to this email with your reason why you didn't purchase and we'll send that over.

Best,

[YOUR NAME]

What this email does well:

Explains why they're getting the email
Reassures them you have no intention of selling them
Asks for them to share feedback, people love to share their thoughts
Prompts them with questions
Gives them something in exchange for their time

The "Non-Annoying Follow Up" Email That Builds Rapport

Scenario: Following up after a conversation and continuing the dialogue
Contributor: Amanda Holmes, CEO Chet Holmes International

Amanda, her team of consultants, and her clients use this template every time they write a follow up letter. Amanda suggests you send a follow up within an hour of your meeting.

Dear [PROSPECT],

That was a great story you told about your daughter. In our next meeting, I have a similar story to tell you.

You certainly seem to have a great grasp on how to make your company succeed. They are lucky to have you.

With the economic challenges you face, however, our training is going to give you that extra push you need to take your staff skills to the next level. Imagine if you could shift the market's buying criteria completely in your favor. This approach improves everything you're already doing.

Once again, it was great meeting you. I have a few ideas about other productivity issues that I know you will like.

Best,

[Salesperson]

What this email does well:

Builds rapport by including something personal they discussed with you
Provides a compliment
Touches on a pain point that impact them
Closes with a personal message

The “Check Out This Useful Article” Email That Continues the Conversation

Scenario: You’ve already spoken with the prospect and want to provide value to keep the conversation going
Contributor: Jill Konrath, Sales Strategist and Author of bestselling books Agile Selling, SNAP Selling & Selling to Big Companies

The first time Jill used this strategy, she was not trying to get a response. She simply read an interesting article that was relevant to her prospect and she felt compelled to forward the article to him. He responded within the hour with a message asking for a meeting.

[NAME],

I don’t know if you saw this article that appeared today in [NEWS OUTLET]. It’s related to the issue we were talking about.

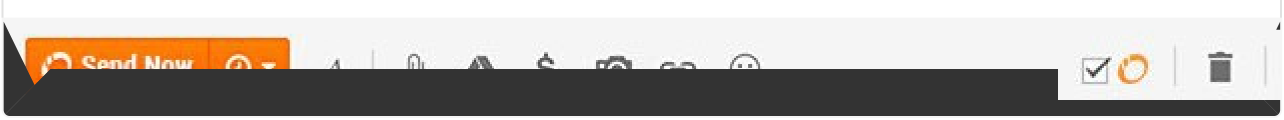
[LINK TO ARTICLE]

I hope you find it interesting.

[YOUR NAME]

What this email does well:

Explains context in the first two sentences
Provides a link to a helpful article
Closes with a simple “Hope you find it interesting,” and nothing more



The "In the Neighborhood" Email That Gets In-Person Meetings

Scenario: When you're in the same city as your prospect
Contributor: Scott Britton, Co-Founder of Troops

This email is great if you can't get a prospect to commit to a meeting or a deal is stalled.

Going to be in town

Hey [name],

I'm actually going to be in Los Angeles in three weeks on business and have a few hours of downtime on Thursday and Friday.

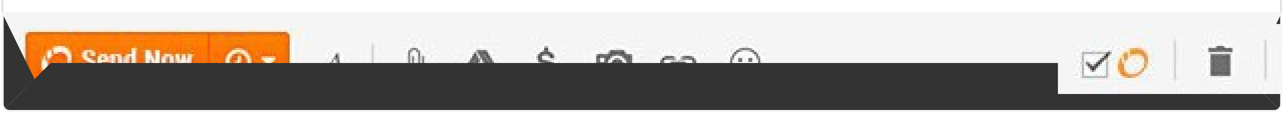
Do you have 30 minutes to connect on either day? I hear your offices are pretty cool and it'd be great to finally meet in person.

Best,

[YOUR NAME]

What this email does well:

Creates an opportunity for a more concrete, in-person connection
Lets the prospect know exactly how much time it'll take



The "Follow-Up Set Up" Email That Gets a 50% Response Rate

Scenario: When they ask you to follow up at a later date.
Contributor: Bryan Kreuzberger, Founder of Breakthrough Email

The prospect isn't always ready to buy when you want them to but may ask you to follow up again later down the line. To speed up your sales cycle and increase the likelihood of reconnecting, schedule the meeting right away.

Calendar in August?

Name,

Thanks for getting back to me so quickly. I really appreciate it.

I'd be happy to reach back out in August.

Does it make sense to schedule something tentative on our calendar to connect? That way we can save time by not having to go back and forth.

How does your calendar look in August? What would be a good week or day for us to connect?

Thanks for your help. I look forward to talking.

What this email does well:

Prevents the prospect from delaying further conversation
Gives a clear call to action to set up a meeting

The "What Would Need to Change" Email That Gets a 30% Response Rate

Scenario: When they aren't interested at this time
Contributor: Bryan Kreuzberger, Founder of Breakthrough Email

If someone says not at this time, it means that right now is not appropriate. So you need to figure out is what needs to change for it to be appropriate.

They might say, "We are not interested at this time. If anything changes, I will let you know."

Quick question...

Name,

Thanks for the quick response. Since it doesn't make sense to talk, I have one quick question. What would need to change in the future for it to make sense for us to talk?

Thanks for your feedback,

[Signature]

What this email does well:

Doesn't try to sell and simply asks for feedback
Short and sweet

The "Keeping Your Information Counter" Email That Gets a 30% Response Rate

Scenario: When they offer to keep your information on file
Contributor: Bryan Kreuzberger, Founder of Breakthrough Email

In this case, the prospect might say, "Thanks for writing. I will keep your information on file. I will reach out if something changes." Most of the time, they're indirectly telling you they aren't interested, but sometimes they just aren't ready to talk yet.

Note from Bryan: *I have never heard back from someone who said they will keep my information on file. I used to think that some day if I was patient they would come calling. Silly me.*

Keeping information on file

Name,

Thanks for the quick response. I've found that when people say they will keep my information on file, typically it's just a polite way of saying they aren't interested. If that is the case, do I have your permission to close your file?

If it is a timing issue, what would need to change in the future for it to make sense to talk?

Thanks for your feedback.

[Signature]

What this email does well:

Approaches the lack of interest directly
Gives the prospect the option to close off communication
Opens up the possibility to speak again if anything changes.

Break Up Emails

The "Breakup Email" That Gets a 33% Response Rate

Scenario: When your prospect has ignored your numerous follow up attempts
Contributor: Katharine Derum, Sales Manager at HubSpot

When your prospect may have completely fallen off the map and ignored your multiple follow-up attempts, a breakup email can often do the trick.

Hi [NAME],

I've tried to reach you a few times to go over suggestions on improving [BUSINESS NEEDS], but haven't heard back which tells me one of three things:

You're all set with [BUSINESS NEED] and I should stop bothering you.
You're still interested but haven't had the time to get back to me yet.
You've fallen and can't get up and in that case let me know and I'll call someone to help

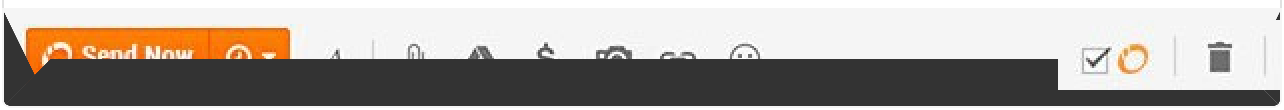
you.

Please let me know which one as I'm starting to worry!

[YOUR NAME]

What this email does well:

Reminds the prospect what you want to help them
Lets the prospect easily say "no"
Injects some humor



The "I Feel Like a Stalker" Email That Got a 70% Response Rate and Booked 30+ Silicon Valley Executives

Scenario: Your prospect hasn't responded after multiple follow up emails
Contributor: Lloyed Lobo, Co-Founder of Traction Conf and Head of Growth at Speakeasy.co

Lloyed had emailed and followed up with 250+ Silicon Valley executives to book them to speak at his conference. He had five days to contact everyone and fill up the speaker line-up. After the initial invitation and multiple follow ups, he had one more trick up his sleeve and was able to book Silicon Valley executives such as:

- CEO of Zenefits, Parker Conrad
- CMO of Slack, Bill Macaitis
- Co-founder of EventBrite, Julia Hertz
- COO of Evernote, Linda Kozlowski

I'm starting to feel like a stalker...

Hey [NAME],

How's it going?

I feel horrible troubling you and I'm starting to feel like a stalker. Much appreciated if you can let me know if you'd [CALL TO ACTION]. If not, I won't send you another email.

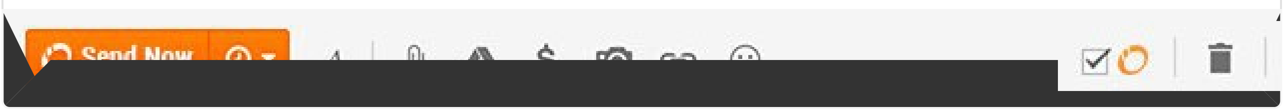
Here's the most recent updated list of [PEOPLE / COMPANIES] I've worked with: [LIST OF COMPANIES / PEOPLE].

Cheers,

[YOUR NAME]

What this email does well:

Takes a slightly humorous approach by pointing out how much he has emailed them
Lets them easily say "no"
Provides social proof of other people he has booked



The "Permission to Close Your File" Email That Gets a 76% Response Rate

Scenario: When prospects completely stop responding to your emails
Contributor: Bryan Kreuzberger, Founder of Breakthrough Email

Only use this email if you follow up with someone two or three times and don't hear back. If used incorrectly, it may come off as threatening. The goal here is to re-connect with people who have completely halted communication with you. You shouldn't use this email if you're trying to start a relationship.

Permission to close your file?

[Name],

I'm writing to follow up on my email and voicemail. We are in the process of closing files for the month. Typically when I haven't heard back from someone it means they are either really busy or aren't interested. If you aren't interested, do I have your permission to close your file?

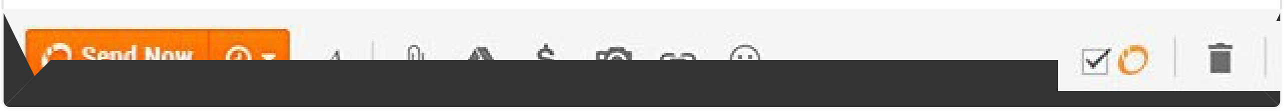
If you are still interested, what do you recommend as a next step?

Thanks for your help.

[Signature]

What this email does well:

The subject line plays on the idea that no one knows what "close your file" means, so it builds the desire the open the email
Provides the prospect with an easy way out so they don't feel bad for not responding
Asks the prospect to set the next steps so they make a small commitment
Thanks the prospect for helping - people like helping other people



The "Looking for Input" Email To Learn From Lost Opportunities

Scenario: You asked for permission to close their file and they said yes
Contributor: Bryan Kreuzberger, Founder of Breakthrough Email

What do you do once someone says no to you? It's a learning opportunity. The email below is an example of how you can respond.

Your file is closed.

[Name],

Thanks for your email. I closed your file. Since it is over, I have a quick question. Why is it you aren't interested? Was it something I did?

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

Thanks for your help,

[Signature]

What this email does well:

Subject line makes it clear that it isn't a sales email
Lets them know it's over and that you've heard them say "no"
Asks a short, easy-to-answer question

A Full Email Sequence That Closed $100,000 in 30 Days

From First Touch, to Follow Up, to Break Up.

No.1: The "Free to Chat?" Email That Opens Up the Conversation

Free to chat?

Dr. [NAME],

Because I work so much within the [INDUSTRY NAME] industry, I constantly follow industry news. Recently I noticed that you've [COMPANY ACCOMPLISHMENT]. Congratulations!

Usually when that happens, [BUSINESS ISSUE] becomes a priority. That's why I thought you might be interested in finding out how we helped [WELL-KNOWN COMPANY OR COMPETITOR] get going quickly in their new direction – without any of the typical cookie cutter approaches to marketing.

Check out our previous campaigns here - [LINK TO RELEVANT CASE STUDY].

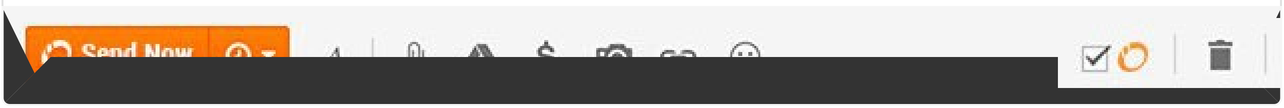
If you'd like to learn more, let's set up a quick call. Schedule 15 minutes here on my calendar - [Meetings Tool link].

Regards,
[NAME]

P.S. If you're not the right person to speak with, who do you recommend I talk to?"

What this email does well:

Shows that they're paying attention to the prospect
Demonstrates credibility by explaining that they helped another business with the same problem
Shares case studies so the prospect can do their research if they're interested
Provides a simple way for the prospect to schedule a meeting



Follow Up Best Practice: Connect More Effectively With People Who Downloaded Information From Your Website

Scenario: You're getting back to someone who downloaded a whitepaper or an e-book
Contributor: Rachel Miller, Sandler Training

The rules change just a bit when you are following up with prospects who have just downloaded information (for example, white papers like this one) from your website. These exchanges are in a different category from people who sent a direct email requesting information and specific answers. Of course, some of the principles and techniques previously discussed still apply. Here are the best guidelines to follow.

Respond as quickly as possible. This point is worth emphasizing. The chances are high that the prospect has made inquiries to competitors. Studies show that in many cases responding more than thirty minutes after the prospect's inquiry can be too late! You are in a horse race to decide who gets ahold of the prospect first. Whoever does is likeliest to win the deal.

In this case, you DO want to call first whenever possible, instead of emailing first. This is because response time is key. If you call and don't reach the prospect, you can leave a message like this: "Hi Jack, this is Greg from Sandler Training. Thank you so much for reaching out and downloading our eBook, 'Why Salespeople Fail and What to Do about It.' I have a question for you. It's kind of important, but not urgent, so please give me a call when you get a chance at 123-456-7890. Thanks."

If you get the prospect on the phone, or when he calls back, establish appropriate rapport and then ask a question like this: “Can you help me with why you were interested in the white paper, and what you were hoping to learn?” This technique will help you to engage the prospect in a meaningful conversation and find out whether there are challenges in his world that you can help to address.

No.2: The "Here's a Free Tool" Email That Provides Value to the Prospect

Free Physician Branding Tool

Hello Dr. [last name],

I'm following-up my previous email with free tool I think you'll love.

It's an brand analysis survey I created just for you (literally, your name is on it), that will help you understand how your practice is different from other doctors in [insert city they're in].

Click here to begin the brand differentiation analysis survey. When we speak, I'll benchmark your responses against the top physician brands around the country.

I'm sharing my calendar (click here) so we can schedule a convenient time to discuss.

Enjoy your weekend,

Matthew

What this email does well:

Provides a free resource that could help the prospect
Makes the prospect feel special by letting them know it was made just for them
Makes it easy for the prospect to book a meeting by using the Meetings Tool in HubSpot Sales

No.3: The "Trying to Connect" Email That Understands the Prospect

is Busy

Re: trying to connect

Hi Dr. <>,

I’m sorry we haven’t been able to connect. Again, I know how hectic things can get at work and with family.

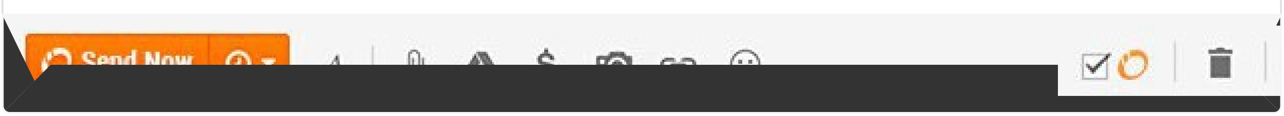
I would be available for a call during weekends or before or after work hours if that’s easier for you. I don’t mean to bug you, but I do want to help you manage your team so you can exceed your goals of [GOAL].

To schedule a time on my calendar, just click here.

Best,
Matthew

What this email does well:

Lets the prospect know he isn’t trying to pressure them or be pushy
Shows that he wants it to be convenient for the prospect by offering to speak outside of work hours
Continues to make it easy for the prospect to book a meeting using the Meetings Tool.



No.4: The "Permission to Close Your File" Email That Gracefully Closes the Loop

Permission to close your file?

Hi Dr. [last name],

I’m writing to follow up. We are in the process of closing files this month. Typically when I haven’t heard back from someone it means they are either really busy or aren’t interested.

If you aren't interested do I have permission to close your file?

If you are still interested, what do you recommend as a next step?

Thanks for your help.

Regards,
[YOUR NAME]

What this email does well:

Lets the prospect know he won't bother them anymore, and also gives them another chance to connect if they truly have been too busy
If interested, he asks the prospect to direct next steps to get some commitment

Don't Waste More Time On Mindless Tasks

- Your CRM does the work for you. Work straight from your inbox. The HubSpot CRM will automatically log your emails and calls.
- Breakthrough Email will build you a predictable sales system to get qualified leads and opportunities with your ideal profile clients. They send the emails, you take the meetings. Click here to learn more.