Advanced Sales Course-
Integrated Digital Prospecting Unit

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Agenda

Rationale & Context

Assignment / Rubric

5 Week “Tools and Tactics” Module
High Demand for SDRs
High Demand for SDRs
What are the skills required?

- Identify and reach out to potential prospects (outbound)
- Qualify inbound “leads”
- Engage prospects – secure appointments – goal is often the creation of a “sales qualified lead”
- The stepping stone job ...
- Tenure is short – folks move up, or OUT
SDR Compensation

Sales Development Representative salaries
United States
View jobs

<table>
<thead>
<tr>
<th>Base salary</th>
<th>Total compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>$45,000 /yr</td>
<td>$57,000 /yr</td>
</tr>
<tr>
<td>Range: $35K - $55K</td>
<td>Range: $40K - $80K</td>
</tr>
</tbody>
</table>

Median: $45,000
Learning Outcomes

• Demonstrate an understanding of the sales tech stack, its dynamic nature, and develop a basic familiarity with some of the more common tools currently in use.

• Develop an understanding of, and ability to utilize an Ideal Customer Profile (ICP) from both a lead scoring and a prospecting perspective.

• Demonstrate the basic skills and techniques for effective cold calling and cold email approaches.

• Understand and demonstrate basic fluency in the use of platforms for video conferencing and CRM.
Prospecting Assignment

- Find a prospect that meets all criteria outlined in an ICP
  - Demographic, firmographic, and behavioral

- Determine that prospect (and firm) are not already in the funnel (SFDC or a google sheet). Create a new record

- Create a compelling email and voicemail to engage that prospect

- Host and **record** a Zoom call. Leveraging the annotation tools, walk through the rationale for choosing that prospect – and present both an email and voicemail outreach

- Upload a copy of the recording to our video system, and submit link, and a PDF of prospect’s LinkedIn profile
Ideal Customer Profile

- Fast growing firms. Overall headcount growth >25% / year – sales \textit{and} headcount growing >30% over the last 12 months
- Company between 200 employees - 600 employees
- Target is a Chief People Officer - a thought leader, who writes, speaks or has demonstrated a passion for human capital and culture \textit{OR}
- CEO – but must have the same writing/speaking focus
- Company HQ and the prospect must be both be located in the United States
The Product: SaaS offering

Remember – the goal is to start a conversation, not sell the product

For fast organizations who thrive on growth and building cultures of human achievement, Catalyst is a family of work apps designed to engage people while helping them to communicate, orchestrate work, and make better decisions. Completely configurable and mobile responsive, with dedicated Android and iOS apps available, Catalyst rethinks how individuals, teams, and companies get work done.

https://www.senseilabs.com/catalyst/
Grading Rubric

17.5% of Total – **Firmographic Characteristics**
- **Company size** within criteria (Binary scoring – 10 points or ZERO)
- **Company Headcount growth** meets criteria (binary scoring)
- **Sales Headcount growth** meets criteria? (binary scoring)
- **Company HQ and Prospect Location** match criteria (binary scoring)

17.5% of Total – **Behavioral Characteristics**
- **Role / Title** – CPO score 10, CEO scores 7 – all others ZERO
- **Behavioral Characteristics.** How aligned are their public speaking, writing, with the assigned criteria?

EXCEL doc included in supplemental materials
Grading Rubric

35% of Total – Presentation (10 points each)

- Level of professionalism demonstrated in the presentation
- Effective use of annotation tools
- Effective use of screen / application sharing tools
- Did you effectively outline how the target meets the **individual characteristics** via LinkedIn or other online sources?
- Did you effectively outline how the target meets the **firmographic characteristics** via LinkedIn or other online sources?
Grading Rubric

30% of Total – Effectiveness of Outreach

- How effective was your e-mail?
- How effective was your voicemail?

Deductions

- Failure to submit assignment in manner requested (5 points)
- Did either your voicemail or email begin with “I” or “my name is..” (10 points)
- Prospect (firm or individual) already exists in Salesforce (10 points)
- Prospect was not entered into Salesforce (10 points)
- Target firm is a potential competitor (3 points)
How do we prepare them?
Module Overview

Week 1 – Who do we sell to? ... and how do they buy?
  • Ideal Customer Profile – Buyer Journey

Week 2 – Traditional Prospecting
  • How do we engage?

Week 3 & 4 – Intro to the Sales Stack
  • Some of the most common tools

Week 5 – Social Selling
  • “Strategic Listening”
Week 1 - Who do we sell to?

Concepts
- Ideal Customer Profile
- Buyer Journey (B2C and B2B)
- Buyer Personas

Example Exercises
- Buyer Journey to “choose Stetson” (B2C) - Groups
  - Highlights different segments / different personas
- Simple Enterprise Buyer Journey – Instructor Led
- ICP for assignment provided during class
Week 2

Concepts of Prospecting
- Inbound vs Outbound
- Cold e-mails – phone calls - voicemails
- Framework for effective engagement
- Sequencing

Example Exercises
- Examples ranging from awful to effective
- Group exercises – to potential Stetson students
- Provide students with company and product info for assignment
Weeks 3-4  The Sales Stack

Class 1

- Taxonomy based on Buyer Journey
  - Where do specific solutions fit into the process?

- LinkedIn – personal profile best practices
  - Crowdsourcing decision on your photo
    - [https://www.photofeeler.com/](https://www.photofeeler.com/)

- Word clouds for key words for your job search
  - [https://worditout.com/word-cloud/create](https://worditout.com/word-cloud/create)
Included in Dropbox folder of supplemental materials
The Sales Stack continued...

Class 2  LinkedIn Sales Navigator (hands on)

- “Decoding LinkedIn Profiles”
- Students asked to sign up for 30 day free trial

Lead qualification exercise

- Provided with a “lead scoring template” for inbound leads
- Groups research score – and share their findings
- Not everyone is as they seem.
- Homework – 45 minutes Sales Navigator Training
  - https://www.linkedin.com/learning/learn-linkedin-sales-navigator

Included in supplemental materials
Weeks 3-4  The Sales Stack

Class 3 & 4
- Value of CRM - and the risks
- Intro to Salesforce and to Trailhead
- Demo of zoom.us – focus on annotation / presentation tools
- Review and prep for the assignment – focus on the best practices for engagement

Exercises
- Students are required to complete SFDC training. Given 3 weeks to complete approx 8 hours of training.
Salesforce Training

One Trailmix module

which includes...

Trailmix by Salesforce Trailhead
Build Your Sales Career on Salesforce
Learn Salesforce essentials to sell more effectively.

~15 hrs 25 mins
Week 5

Social Selling

• Notion of building relationships prior to selling
  • Value of engagement across multiple platforms
• Strategic Listening
• Interest / Purchase triggers
• Brief discussion of AI – opportunities for algorithmic prospecting
Thank You
Questions?

Updated Slides – Additional Materials

Email jfyles@stetson.edu for access to materials at:

https://bit.ly/2Mlgz5k