



Advanced Sales Course- Integrated Digital Prospecting Unit

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STETSON
UNIVERSITY
School of Business

Agenda



Rationale & Context

Assignment / Rubric

5 Week “Tools and Tactics” Module

High Demand for SDRs

in sales development representative United States

Jobs ▾ Date Posted ▾ LinkedIn Features ▾ Company ▾

Sort by: Relevance

Sales development States 8,598 results

- Past 24 hours (561)
- Past Week (2,108)
- Past Month (5,974)
- Any Time (8,598)

Cancel Apply

Sales Development Representative
Tanium
Addison, TX, US
1 week ago

High Demand for SDRs

LinkedIn search interface for "sales development representative" in the United States. The search results are sorted by Relevance. The "Experience Level" filter dropdown is open, showing the following options:

- Internship (76)
- Entry level (5,213)
- Associate (1,144)
- Mid-Senior level (806)
- Director (231)
- Executive (47)

The "Entry level" option is circled in red. The "Apply" button is highlighted in blue.

Jobs | Date Posted | LinkedIn Features | Company | Experience Level | All filters

Sort by: Relevance

Sales development representative in United States
8,598 results

Job Alert Off

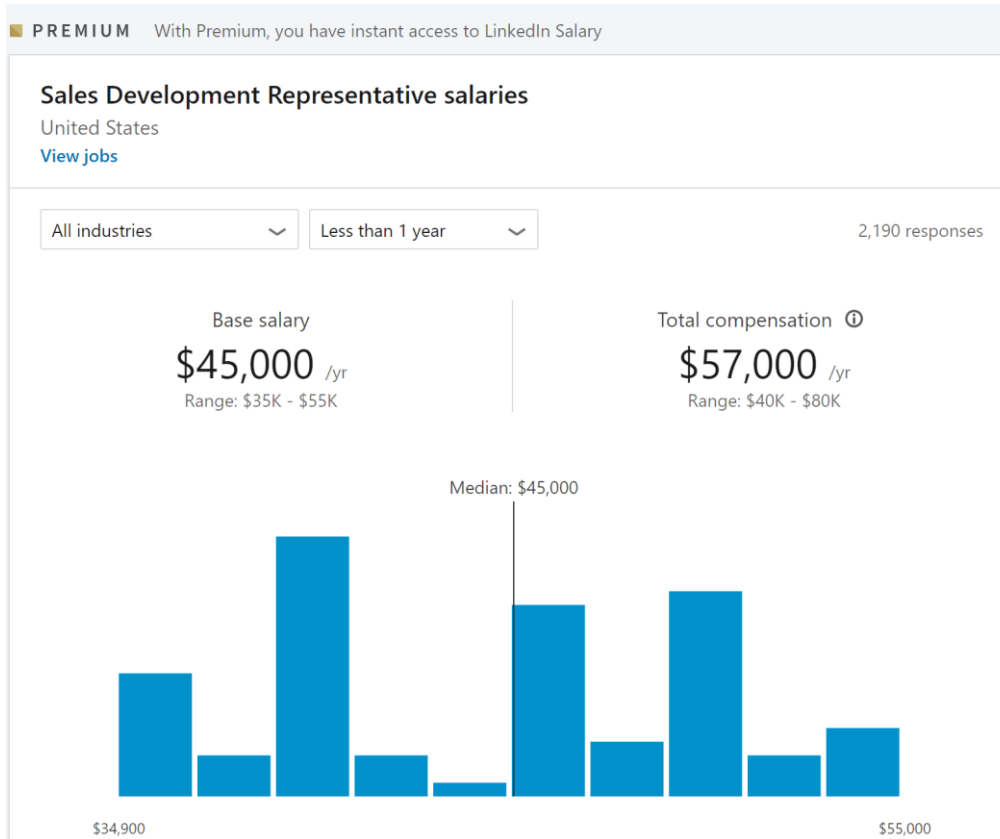
Synopsys Inc
Mountain View, CA, US
2 weeks ago

Sales Development Representative
Tanium
Addison, TX, US
1 week ago

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



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 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 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?

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

*Linkage between
buyer journey & sales
process*

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

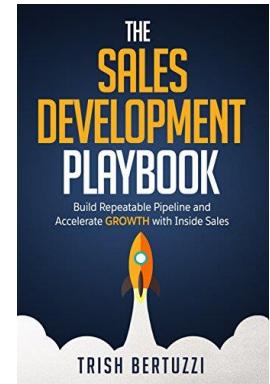
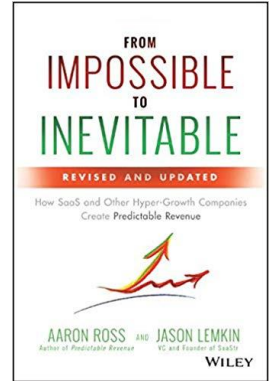
Week 2

Concepts of Prospecting

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

Example Exercises

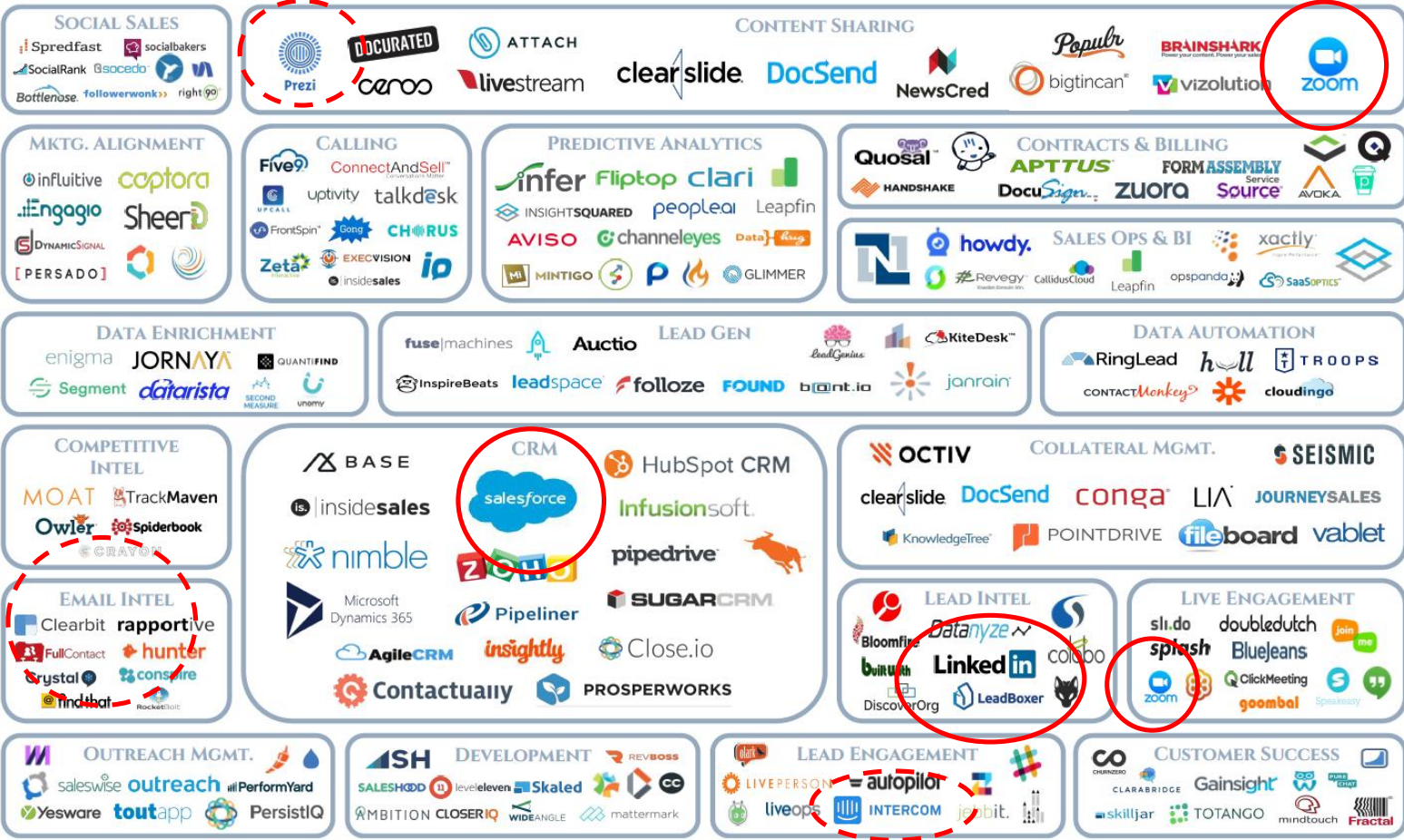
- Examples ranging from awful to effective
- Group exercises – to potential Stetson students
- Provide students with company and product info for assignment



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/>
 - Word clouds for key words for your job search
 - <https://worditout.com/word-cloud/create>



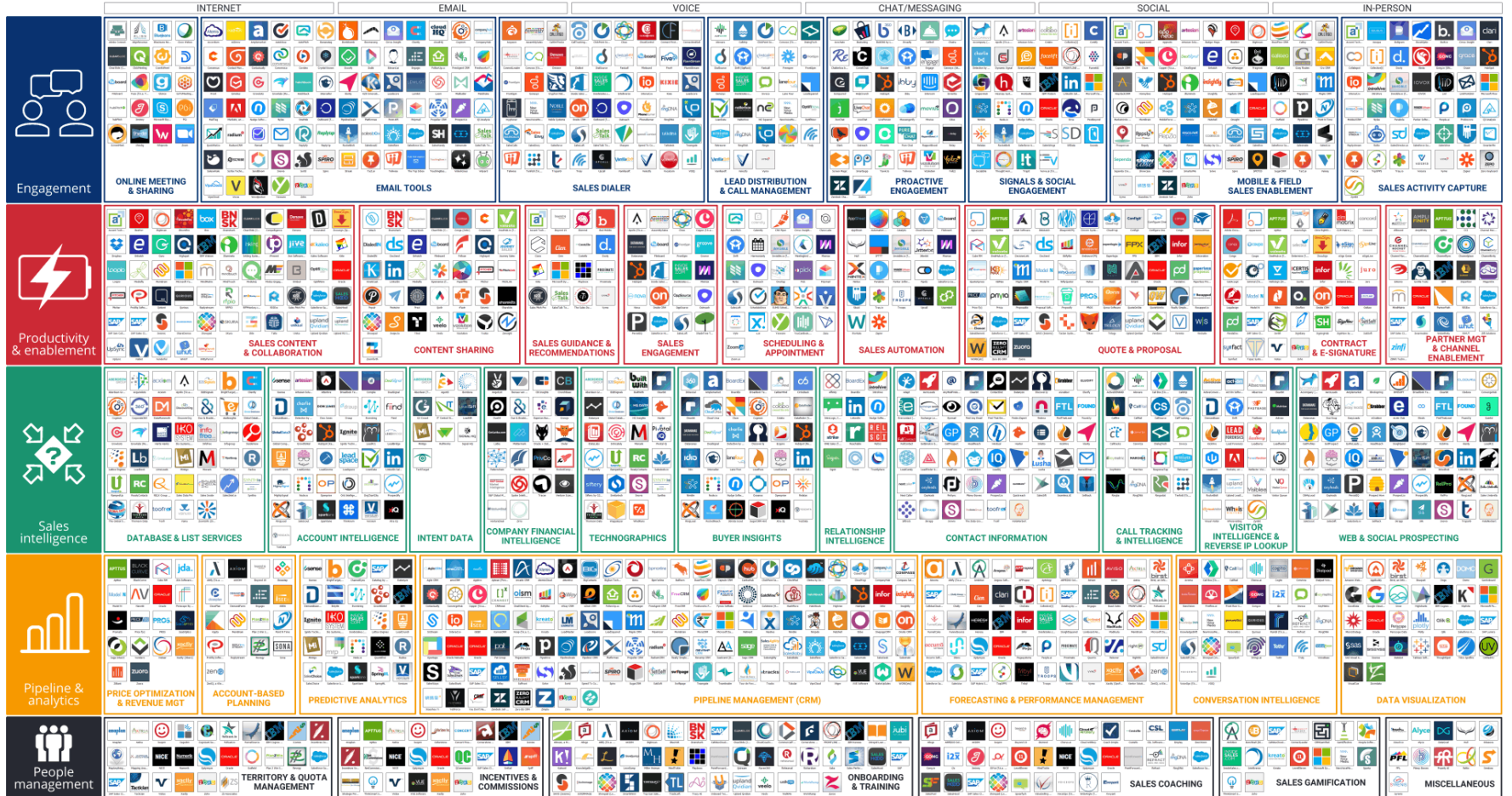
<https://bowerycap.com/blog/sales/2017-startup-sales-stack-report/>

Included in DropBox folder of supplemental materials

DESIGNED BY
Nicolas De Kouchkovsky

SalesTech Landscape

POWERED BY
VB | Profiles



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

Included in supplemental materials

- 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>

Weeks 3-4 The Sales Stack

Class 3 &4

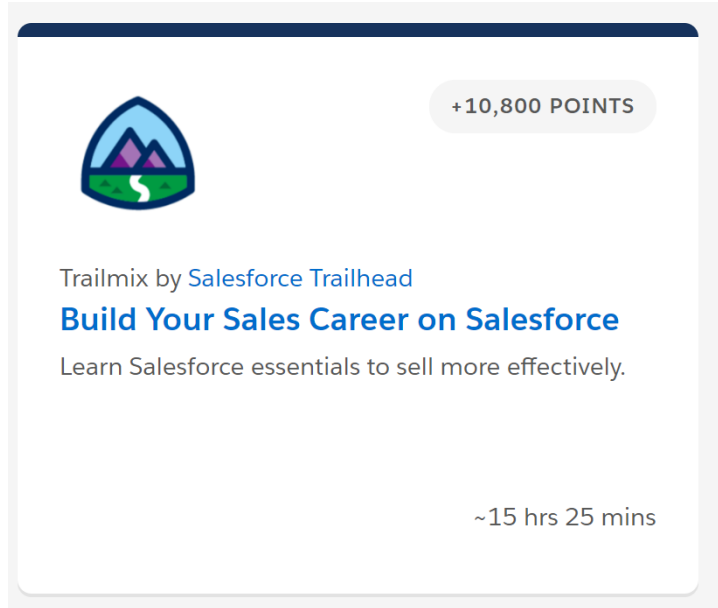
- Value of CRM - and the risks
- Intro to Salesforce and to Trailhead
- Demo of zoom.us – focus on annotation / presentation tools
- Review and prep for the assignment – focus on the best practices for engagement

Exercises

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

Salesforce Training

One Trailmix module



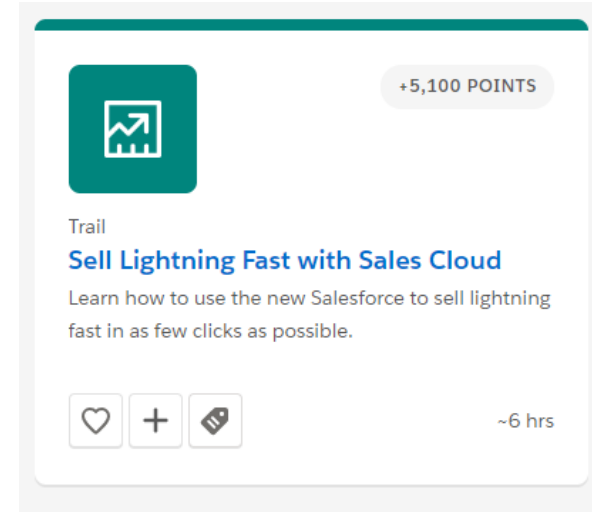
A card with a blue header bar. On the left is a circular icon with a mountain and a path. On the right is a grey pill-shaped badge with the text '+10,800 POINTS'. Below the icon, the text reads 'Trailmix by Salesforce Trailhead', 'Build Your Sales Career on Salesforce', and 'Learn Salesforce essentials to sell more effectively.' At the bottom right, it says '~15 hrs 25 mins'.

+10,800 POINTS

Trailmix by [Salesforce Trailhead](#)
Build Your Sales Career on Salesforce
Learn Salesforce essentials to sell more effectively.

~15 hrs 25 mins

which
includes...



A card with a teal header bar. On the left is a teal square icon with a white line graph. On the right is a grey pill-shaped badge with the text '+5,100 POINTS'. Below the icon, the text reads 'Trail', 'Sell Lightning Fast with Sales Cloud', and 'Learn how to use the new Salesforce to sell lightning fast in as few clicks as possible.' At the bottom left are three icons: a heart, a plus sign, and a document. At the bottom right, it says '~6 hrs'.

+5,100 POINTS

Trail
Sell Lightning Fast with Sales Cloud
Learn how to use the new Salesforce to sell lightning fast in as few clicks as possible.

~6 hrs

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>