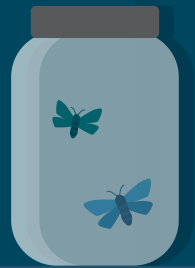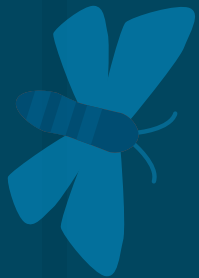# The Lead Generation and Sales Enablement Guide

for Fast-Growing Companies

CloudKettle

Introduction

This eBook is all about lead generation and sales enablement. We know, besides Account Based Marketing (ABM) and machine learning we couldn't have picked trendier buzzwords in the B2B Sales space. So if you're smart, you're probably skeptically wondering "What is this book *actually* going to teach me?"

Buzzwords aside, this book is going to teach you (or your team) how to get more leads and how to close more sales. We've taken what we've learned from a decade of experience working with SaaS companies to bring you quantifiable ways to improve your lead generation efforts and sales performance.

Chapter one and four are aimed specifically at founders. Chapter one speaks to what lead generation looks like at each stage of your company. Chapter four focuses on how you structure a lead gen team, who your Sales Development Representatives (SDRs) should report to and what a compensation structure for your SDRs looks like.

Chapter two is a strategic chapter that outlines how you identify who your organization's target prospects are, how to develop scripts for your SDRs, and how to identify which platforms to contact leads on. The first half of chapter three is aimed at lead generation and discusses how to buy and build lead lists. The second half is an overview of best practices for your Sales reps, and sales enablement tips and tricks.

Chapter five and six are relatively straightforward. If you don't have Salesforce, we recommend you skip chapter six. Lastly, whether you're building a Sales team or looking for inspiration as a Sales rep, chapter seven is a complete breakdown of the key pieces of sales enablement collateral your organization should be using.

As always, if you have any questions feel free to get in touch. (http://bit.ly/contactusck)

Contents

Written by Greg and Eilidh

CHAPTER 1

What is a SDR & How to Hire One

Before we dive into lead generation, we'll first cover what your Sales team might look like at each stage of your company. We created the image on the right based on an article Jason Lemkin published that outlines the best sequence for building a repeatable sales engine (http://bit.ly/salesenginejl).

The Sales Development Representative

SDRs, also known as Enterprise Business Representatives (EBRs), are Lead Generation team members that prospect and qualify leads before handing them off to the appropriate Sales rep. They are part of the trend in specialization of sales roles that in many ways was pioneered by Salesforce. Like an assembly line, the idea is to break apart the process of manufacturing a sale and have teams members specialize in different portions. Then, they each become more effective and efficient.

In addition to a modest base salary, SDRs are traditionally compensated for each qualified lead they hand Sales. They also often receive a small percent of the value of the resulting sale. SDRs tend to be young, hungry, and are willing to aggressively hunt leads in order to prove themselves. They are also technically savvy and adapt easily to the realities of today's digital selling world.

It's often difficult to motivate traditional Sales team members to hunt new prospects when they can more easily go to their existing well. SDRs help by doing the work Sales sometimes won't and also set a good example that can motivate Sales team members. Finally, SDRs are a low-risk way to introduce young blood to an organization and groom them to graduate up to a more senior member of the Sales team. While the number varies by organization, a well trained/effective SDR can generally feed qualified leads to three or four Sales team members.

THE SEQUENCE FOR
Building a Repeatable Sales Engine

CEO/Founder closes the first 10-20 sales
Learn the process and know what works (or doesn't)
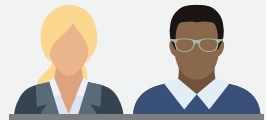
Hire 2 sales reps
2 reps allow you to A/B test tactics

Hire Head of Demand Gen
Get more leads and nurture existing leads

Hire VP of Sales
Will grow the company (not there to figure out sales process)

SDRs are a low-risk way to introduce young blood to an organization and groom them to graduate up to the Sales team.

CLICK TO TWEET

Depending on how small your Sales team is, you may not have any Sales Development Representatives (SDRs). The size and structure of your organization will dictate whether it's the Sales reps or SDRs who are responsible for lead generation and qualifying activities.

What a day in the life Looks like for a SDR

One of our all-time favorite videos about SDRs is made by Sales Hacker (http://bit.ly/sdrvideosh). It takes you through what a typical day looks like in the office, includes tips, things to avoid, and a timeline of the day. This is a great resource for onboarding a new SDR and will give you insight as a founder or executive into what you can expect to see a SDR doing.

Earlier we mentioned the importance of having a compensation structure built around how many qualified leads are passed from a SDR to Sales. SDRs should be compensated per marketing qualified lead (MQL) they hand off and what is defined as a MQL should be very specific. Also, because SDR's are often very junior, this role must also have measurable and meaningful KPIs. A great resource for KPI guidelines for your SDR can be found here (http://bit.ly/sdrkpiguide).

How to Hire a SDR

Here's the job description we share with our clients hunting for SDRs:

The Role

Insert your company name is hiring a Sales Development Representative (SDR). SDR's develop and qualify revenue opportunities for senior members of the sales team to pursue. This is a quota carrying role and candidates for this position must be highly motivated, tenacious, and self starters.

Responsibilities:

- Create and prioritize strategic target account lists.
- Research and build "cold accounts" (i.e.: adding contacts, sending emails, cold calling).
- Demonstrate the components of the *insert your company name* platform over the phone and online.
- Generate new business opportunities to fuel the sales pipeline.
- Conduct high-level conversations with the Sales team on prospective new customers.

Requirements:

- A history of developing pipeline or making high-volume sales over the phone.
- Experience prospecting and cold calling to generate sales opportunities.
- Track record of exceeding sales quotas.
- Demonstrated analytical and problem solving skills.
- Demonstrated customer-facing skills, including expectation management, communication skills, information management.
- A university degree or college diploma.
- A well developed sense of humor.
- Experience working in the technology, *insert relevant industry* or call center industry.
- Experience using *insert your CRM name* is an asset.
- Must be available to work on-premises in *insert location*.

Download the PDF version of this job description and get hiring! (http://bit.ly/sdrjobdescription)

CHAPTER 2

Lead Generation: Getting Started

Now that we've gone over the function of a Sales Development Representative (SDR), this chapter talks all about lead generation from an aerial view. Describing high level concepts that guide Sales best practices. We cover how to identify your prospects, medium and messaging. Whether you're a founder, SDR, or Sales rep doing lead generation, this chapter explains how you can get started.

## Why isn't Everyone Doing it?

A lot of what we talk about in this chapter is going to seem relatively straightforward. Which begs the question, why isn't everyone doing it?

Getting sales is like making sausage. It involves a lot of things most people don't like doing. For example, phoning and emailing strangers and repeatedly contacting prospects across a number of mediums. People tend to skip the steps they are not comfortable with, hoping to achieve the same result. Which doesn't work.

> Getting sales is like making sausage. It involves a lot of things most people don't like doing.
>
> CLICK TO TWEET
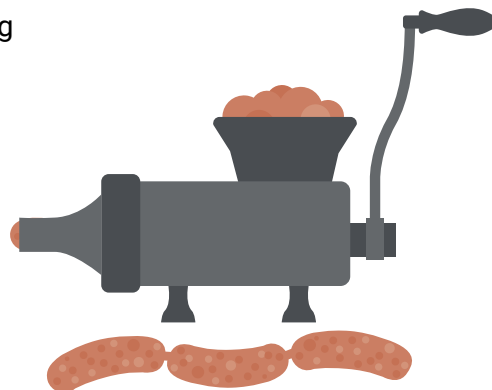
Who are your Target Prospects?

Make things easier on your Sales reps by getting really specific about who you're trying to target. By identifying your target prospects, you increase the chance the stranger the Sales rep contacts is going to be interested in what they're saying.

So how do you do that? Start with this series of questions:

- What type of organization are you pursuing?
- Which role in the organization is most affected by your product?
- What problem do you solve for them?
- Who will champion your sales cycle?
- Who has decision making power?
- Who is the budget holder?

Medium & Messaging

Next, think about how you can most effectively contact those target prospects. Phone calls? Email? LinkedIn? Twitter? While considering this, keep Spam Laws in mind. Remember that during prospecting, your only goal is to keep their attention long enough to book a meeting. You probably shouldn't try to book a demo or close a sale on the first touchpoint. In fact, depending on who you talk to, it can take from four to seven touches to just get a prospect on the phone. Be realistic and persistent in your pursuit of leads.

Messaging

In crafting your value proposition think about:

- Who is most impacted by your product?
- Are you solving a problem or creating an opportunity?

Be mindful of the space you're in and adapt your value proposition to what is happening in the organization or industry. The key to creating consistency in your company's Sales messaging is developing Sales enablement collateral like email scripts. Not only does this help onboard new SDRs faster, but it also gives your existing SDRs tools to make them more efficient and effective.

For other sales enablement ideas check out chapter seven. We've put together a list of the key pieces of collateral your organization should be using.

How to Develop a SDR Email Script

Tell Stories

If you have marketing collateral, like case studies, use those. If not, have examples on hand that highlight how your product has helped current clients. Show—don't tell. It's tempting to ramble off all the benefits your product may hold for a potential user. Instead, focus on sharing a narrative about how your product fixed a real problem for a real person.

Say things like "Good question. Here is how one of our clients is solving that issue…"

Tell Stories

Tell stories, have statistics, and know the most common objections.

CLICK TO TWEET

Have Statistics

Leveraging statistics goes back to knowing the space you're in well. If your product solves a problem, have some statistics and numbers around how much money they could save. As well, quantify the value you add so you aren't being judged on cost. If your product creates an opportunity, do your best to put a dollar value on that opportunity.

Have Statistics

Common Objections

There will always be common objections, so prepare by having queued responses. Having an idea of what you'll say to an objection will make your answer seamless and your prospect will feel like you've made the appropriate considerations in the development of the product. Create objection handling scripts and make them shared docs your team can access and improve over time.

The development of these Sales enablement tools isn't a one shot process. The more research and reaching out your SDRs do, the more you'll learn about your target customer, common objections, etc. Make sure these findings are captured and the Sales enablement collateral evolves as you do.

Common Objections

CHAPTER 3

Lead Generation: Getting Organized

Now that we've talked about sales strategy, let's dive into operational best practices for your sales reps. First we'll discuss some basic lead generation tips and resources. Then, talk about how to determine which leads to work first, how to work them, how to organize your day, and best practices on following up.

Create and prioritize lists then manage your time for success.

CLICK TO TWEET

Build or Buy Your Lead List?

Depending on your company's assets, you might choose to build or buy lead lists. When building your lead lists you can use legacy data in your CRM, or pull followers from social channels like Linkedin and Twitter. Buying lead lists might be your only option if you're an early stage organization without legacy data. There are many platforms you can use to populate lead lists, our favorite is Upwork. (http://bit.ly/upworklink)

Buying Lead Lists

First off, let's be clear. When we say buy a lead list, we don't mean buy an Excel sheet of 10,000 people from a shady operator. Rather, you should come up with the criteria of who the perfect companies to pursue are and what titles in the company you are most interested in targeting. Then, take that list and provide it to a third party on a platform like Upwork who can help find more details on each organization. If you aren't familiar with Upwork, it's a platform that connects freelancers to employers. It's a great resource for getting low value but time consuming projects done in a cost effective way.

When creating a job on a third party platform, make sure you always provide a template spreadsheet with all the columns you want and examples in each. Also, make sure that your instructions are crystal clear. Include directions on what to do if information on a specific lead isn't available etc. For example, if you're following an ABM strategy you might provide a list of 100 companies and specify you want the name of the Sales VP, a phone number or email address for that person, as well as other information for each company. Set a specific end date, get a sample after 24 hours, and review work diaries on a consistent basis.

Make Your Lead List Better with Marketing Automation

We always advocate using SaaS tools in your lead generation efforts. Tools like SalesforceIQ, data.com, and Hubspot will populate details like social media handles, current job, location etc.
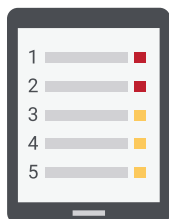
Prioritize Your List

Now you're ready to identify who your top prospects are. There are a number of factors that determine the quality of a prospect. The common ones include size, revenue, specialty, and industry.

Other key indicators that you should consider are, what's happening in their organization? For example, personnel changes, growth, or struggle. What's happening in their industry? Have there been any recent acquisitions? Or, have any new government regulations come into effect?

Organize Your Day

Where are your prospects located?
• Time Zone

What is your activity target?
• Contact lists
• First touches
• Follow ups
• Qualifications

How many meetings do you have?
• What day of the week is it?
• Is there a holiday?

Determine Who to Work and How

Eventually, leads will start coming in organically, via paid advertising and tradeshows and you should reach a point where you have more leads than you could possibly work. Then you'll have to decide how and who you'll work first.

To get started, answer/do the following:

- Is this the right person in the organization to be working?

- If yes, then spend 5 minutes or less researching the company.

- Make notes in the CRM each time you reach out, to avoid having to research them again.
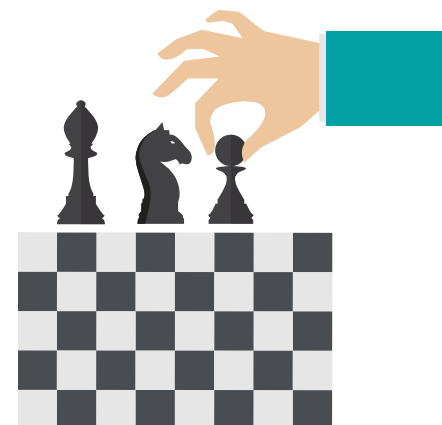
Timing

Busy, important people tend to get to the office early. Leverage that and schedule emails to be sent out first thing in the AM or Sunday evening. The same goes for making follow up calls. Times like 8:00 AM, gatekeepers tend to be out of the office that early. So, 8:00 AM can be a great opportunity to bypass them with a call and reach your desired target. If you do call during the day, try 5 minutes before and after the hour. That is often when people are just exiting meetings and at their desk, not quite started on another task.

> Sales tip: if calling during the day, try 5 mins before or after the hour - that's when people are exiting meetings & at their desk.
>
> CLICK TO TWEET

Vary when you call/email and keep track of what works. Just like there are optimal times to post on social media, there are optimal times to contact prospects. We find Friday afternoons and Sunday evenings are good times for email because there are fewer junior members around demanding time and meetings of executives (Friday) or because they are clearing their inbox and getting ready for the coming week (Sunday).

Change Things Up

The key to sales is persistence. Not having success? Try different messaging, different contacts, changes the frequency of contact, or length of message, etc. If you aren't having success across the board, change your focus to a different vertical or territory.

Work with Marketing to Help Close Deals

Run campaigns or blitzes to keep things fresh and use inbound content to move leads through the sales funnel. A story we like to share with our clients is, once we were having a difficult time closing a deal. The prospect had expressed a very specific pain point they were looking to solve with our product. Overnight we wrote a case study that talked about how our SaaS product solved that same problem for an existing client. We published and then emailed the potential client a copy; with a note saying "Came across this case and thought you'd find it interesting." As a result, we were able to close the deal more quickly.

Average Number of Times a Salesperson Will Follow Up

We emphasize following up and being persistent because it's what closes sales.

The Number of Touch Points Salespeople Make on Average

Contact x**1**	48% never follow-up
Contact x**2**	25%
Contact x**3+**	10%
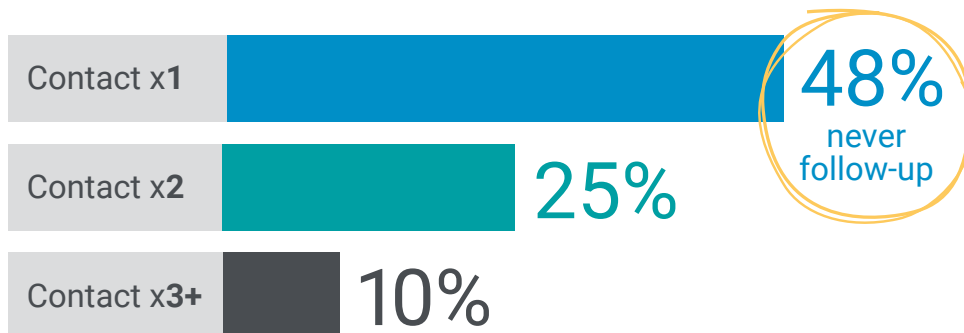
Relationship Between Number of Touchpoints & Deals Closed

TOUCHPOINTS

1st	2%
2nd	3%
3rd	5%
4th	10%
5+	80%

5 or more touches to finalize 80% of sales.

Studies show the majority of sales happen on the fifth or sixth touchpoint.

CLICK TO TWEET

Following Up

Following up works one of two ways. Either you set a reminder within your CRM or you don't follow up. We hear stories all the time about the outliers that magically remember everything or use Post-it notes. These are faulty systems and won't work for 95% of salespeople. Use your CRM or a tool like the SalesforceIQ's Gmail plugin to set reminders and make sure nothing falls through the cracks.

Don't Become a Professional Stalker

Only follow up every 2-4 days unless otherwise asked. However, if you don't hear back, continue to follow up. Most decision makers are busy people. Don't give up early and trust that if someone doesn't want to hear from you, they're going to let you know that.

Keep It to the Point

Explain why you're trying to get in touch, keep it short and expressly ask for a call/meeting. When you ask for that call/meeting, contain your ask and be explicit about how much of their time you're asking for and what you want to talk about.

9:30
Friday, March 14

Follow-up with John

Email Regan
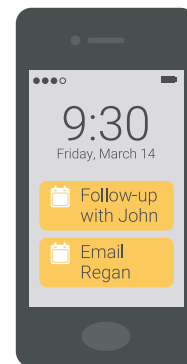
CHAPTER 4

Why SDRs Should Report to Marketing Not Sales

In this chapter we take a break from talking about lead generation and outline who your SDRs should report to. With over a decade of experience working with SaaS companies and having built a few lead generation teams ourselves, we believe SDRs are most effective when they report to Marketing.

Top 3 Reasons SDRs Should Report to Marketing:

1. SDRs need to be coached and mentored—a lot

They are usually the hungriest, but least experienced members of the Sales process. Our experience is because Vice Presidents of Sales are so focused on their heavy lifting Sales reps, SDRs are never given the amount of attention, training, and coaching they require. In comparison, because most Marketing departments have smaller teams and SDRs are the last stage of the funnel before Sales takes over, they tend to get a lot of love.

2. SDRs tend to look up to Sales team members

SDRs are less experienced and generally their goal is to rise to a Sales executive role. As a result, SDRs can become too eager to please Sales reps. This is an issue when a particularly charismatic or very aggressive Sales team member cajoles or bullies a SDR into serving them more than the other team reps. Or a Sales reps will convince SDRs to only pass certain types of leads. We often notice Sales reps don't like working leads from certain industries and they will pressure their SDR into over-qualifying leads from that industry. Over time, the SDR will stop passing along those type of leads altogether. While the Vice President of Sales might overlook or even condone this behavior, a CMO or Vice President of Marketing likely will not.

3. Passing qualified leads to Sales is Marketing's job

Putting the onus of lead qualification on Marketing and measuring Marketing's success in number of qualified leads (not just leads passed) helps ensure only quality leads are handed off to Sales. In our experience, this also helps align Sales and Marketing by establishing shared goals.

Sales and Marketing Alignment

Without implementing a contract that outlines a definition of a qualified lead and how many qualified leads will be passed from Marketing to Sales each month, friction between Sales and Marketing is inevitable. As we mentioned above, Marketing's role should be to enable Sales by generating qualified leads.

Developing a Sales and Marketing Service Level Agreement (SLA) helps reduce friction by forcing the two teams to agree on the definition of a qualified lead and how many should be passed each month. As a result, disputes over whether a lead passed from Marketing to Sales is qualified or not decreases. It also holds Marketing accountable for maintaining a certain level of lead quality and means that Sales can't blame Marketing for not reaching quotas or passing weak leads.

A well-written SLA can align Sales and Marketing, by establishing how to define, measure, and engage qualified leads. If you're looking to build a comprehensive SLA, check out this free SLA Template *You Need For Sales and Marketing Alignment* (http://bit.ly/slatemplate).

CHAPTER 5

Qualifying Leads: BANT & BASHO

In this section we'll take a look at the BANT method for qualifying leads, which we often recommend to fast growing SaaS companies. A widely used, generally accepted, and easy-to-understand method for qualifying leads, BANT was purportedly created by IBM.

BANT Methodology for Qualifying Leads

Once you have your leads scored and your Sales Development Representatives (SDRs) working the most promising ones, they still need a measurement in order to determine who gets passed on to Sales and who gets bounced out of the qualification funnel (hopefully to re-enter it via a Marketing Automation nurture campaign at a later date).
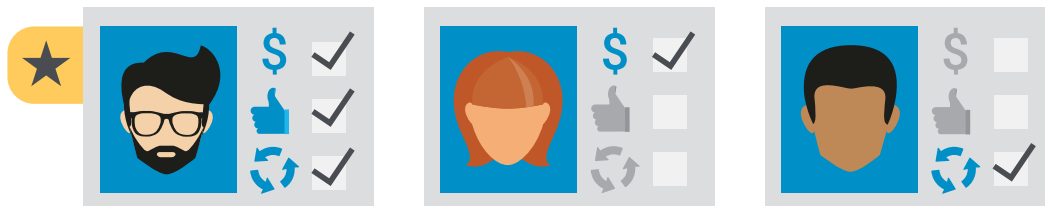
There needs to be an official "moment" when the SDR can hand a lead off to Sales as qualified (and be compensated for it). In Salesforce parlance, this would be when a lead is ready to be converted or when an opportunity is ready to be created. While there are many ways of doing this, BANT is the method we prefer for smaller or less experienced Sales teams.

What does BANT stand for?

The acronym BANT stands for Budget, Authority, Need, and Timeline.

Budget	Do they have the ability to spend?
Authority	Do they have the authority to make the purchase?
Need	Does the lead have an urgent problem?
Timeline	Do we know a timeframe for when the decision and purchase will be made?

Why Use BANT?

There are dozens, if not hundreds, of different sales qualification methodologies to choose from. While many are excellent, most are also highly customized to the organizations they service. Which is great—if your organization is developed to the point of needing a customized lead qualification system. However, for smaller or less experienced Sales teams, BANT is an excellent foundation to use until your organization is able to develop one of its own.

BANT is great because it forces Sales, as well as Management and Marketing, to ask hard questions. Questions most people don't like to ask. It's also excellent because it helps determine where efforts (in terms of what leads and opportunities to work) should be focused. Which, in part, means organizations can more quickly weed out the tire kickers that are a drain on your resources. It is also easy to remember and to understand— important for a fast growing, green Sales team.

Eliminating Garbage Leads = More Realistic Pipeline

Steady use of BANT, or another well thought out lead qualification process, provides a more realistic pipeline and helps determine which salespeople are heroes and which are laggards. After all, if every lead being thrown over the fence from Marketing to Sales is qualified, there should be some consistency among salespeople on how many convert to sales. In short, it helps take away the complaint that Sales (or a particular salesperson) is getting garbage leads.

Establishing that official "moment" when a lead is handed-off, and comping the lead generation team based on the BANT qualified leads they produce also forces Marketing to generate something better than just "leads." If, at the end of the day, Marketing's success is measured by qualified leads passed and the cost for each, Marketing is incented to generate, nurture and qualify higher quality leads. Something more than just a list that was bought at a trade show or online.

BASHO

Where BANT is a set of criteria for qualifying leads, BASHO can be thought of as a method of pursuing leads in order to achieve BANT qualification. Some of the history behind its development has become apocryphal. However, in its essence it was developed as a methodology to sell high-value solutions, with complex sales cycles in a world where email was becoming a more powerful force in the enterprise space. It works particularly well in industries where directness is valued (like the tech sector).

While the original branded training is no longer publicly available, variations of it are used at companies like SAP and Salesforce. It is so well known now that the concept has eclipsed the brand.

A BASHO email is one that is designed to act as a cold open and get attention by demonstrating that you understand a prospect's pain and need. BASHO emails are carefully crafted and a variation of the BASHO style is what makes up many Marketing Automation drips. A cadence might look like five to six touches or more, with many of those efforts being scripted emails. In our experience, having at least every second touch be a phone call is much more likely to elicit a response than email only.
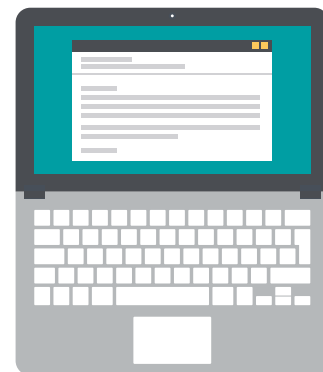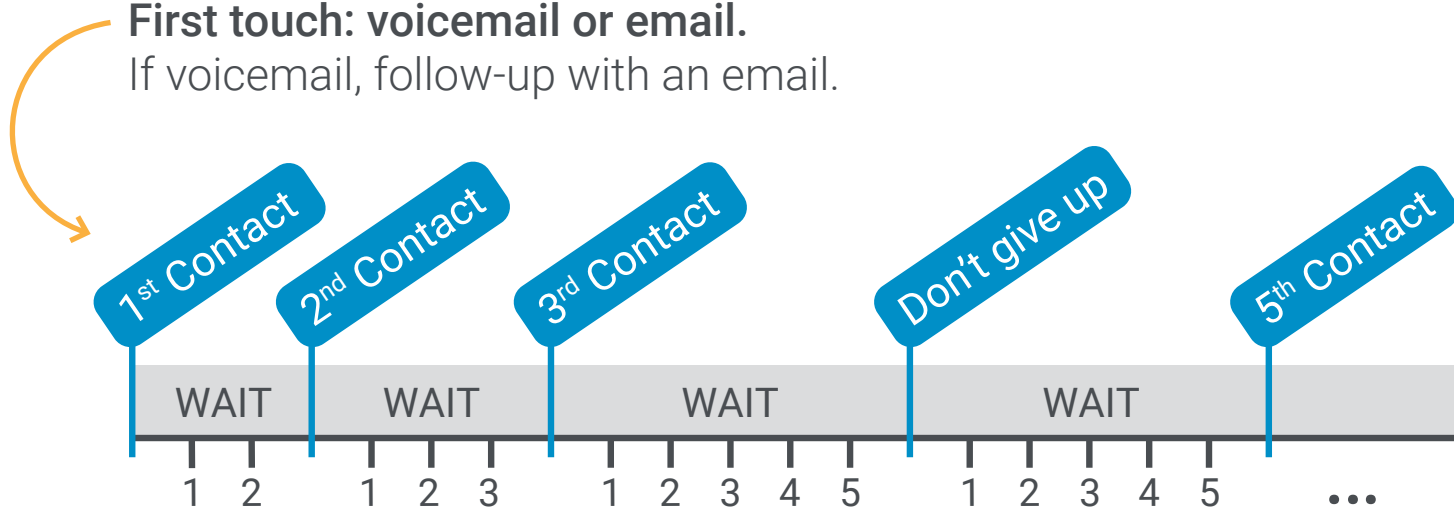
While there are many variations, a quick Google search will provide a wide list of BASHO-esque templates and cadences to try. What's most important is that there is a planned cadence and that results are measured.

If your organization does establish a BASHO cadence, simple processes can be built in Salesforce in order to create reminder tasks so Sales remembers to follow up. Tools like SalesforceIQ even allow for email templates to be easily created and used directly in Gmail.

First touch: voicemail or email.
If voicemail, follow-up with an email.

1st Contact | 2nd Contact | 3rd Contact | Don't give up | 5th Contact

| WAIT | WAIT | WAIT | WAIT |
| 1 2 | 1 2 3 | 1 2 3 4 5 | 1 2 3 4 5 | ... |

Business days between contact will vary.

The Seven Steps to a Successful Sales Call

The end game of qualifying leads is to pass them off to the Sales team and have a rep reach out with a phone call. For a sales call to be successful, you have to be prepared. We've created a Sales call checklist (on the next page) you can keep beside your desk to help make sure you're set up for success.

Seven Steps to a Successful Sales Call

☐ **STEP 1: Do Your Research**

Pre call notes, confirm who will be there, research the people and the company (news, social, etc.)

☐ **STEP 2: Create a Plan**

Know the path before you start. Have a general outline for how the call will flow.

☐ **STEP 3: Show Up Early**

Be the first on the call or five minutes early if the meeting's in person.

☐ **STEP 4: Let Them Talk**

Ask open-ended questions (be prepared to throw out the plan).

☐ **STEP 5: Prepare for Objections & Know the Competition**

It's OK to say "I don't know." It's a reason to follow up and better than giving a bad or false answer. Also, prepare for the price question (plan ROI).

☐ **STEP 6: Leave a Souvenir**

If the meeting is in person, bring product sheets, business cards, etc., to leave.

☐ **STEP 7: Follow Up Email**

Thank them for their time and send them something relevant like a case study or answers to questions they may have had on the call.

CHAPTER 6

How to Track Qualified Leads in Salesforce

In the last five chapters we've talked about lead generation and sales enablement. Once you have those tools and best practices in place, it's important that you're constantly measuring what's working (and what's not) for your organization.

While many organizations measure Marketing's performance by the number of leads generated "By Source" in Salesforce, this is a rudimentary method that doesn't capture/account for the nuances of today's complex sales cycles. Salesforce has a far superior method for tracking all the touches that contribute to a successful sale. Even showing the return on investment, total pipeline and dollars in sales generated. This great feature is called "Campaigns."

How to Track Qualified Leads in Salesforce

Salesforce is similar to Google Analytics and other tracking programs in that it has the concept of a "Source" and a "Campaign." Unlike those platforms, it does not have the concept of a "Medium" (although that can be added as a custom field). Salesforce also differs from Google Analytics and marketing automation platforms like Marketo, Eloqua, Pardot and Marketing Cloud, in that it isn't generally isn't the primary entry point of data from the website.

While it's possible (using the native Web to Lead feature) to push leads into Salesforce with some tracking data, this is a simplistic method. Most sophisticated organizations take things a second step, and pull source and campaign data into something like a marketing automation platform and pass that data into Salesforce via their integration.

Lead Source vs Campaigns (Broad vs. Narrow)

Your Lead Sources in Salesforce should be broad buckets. Think, tradeshow, customer referral, online advertising, or social media. Salesforce comes with a default picklist, but you should update that list with Lead Sources specific to your business. When developing your list, think about Lead Source in terms of what your staff might update as they input new leads by hand. Also keep in mind that as Leads convert, they will carry that Lead Source information into their associated Contacts and Opportunities (although not Accounts, but that can be done with a little development work).

Campaigns, on the other hand, are very narrow. They can be as narrow as, *AdWords Retargeting October 2016*. As you set up campaigns you need to think about what your bucket types of campaigns will be. For most organizations the defaults in Salesforce are a good place to start.
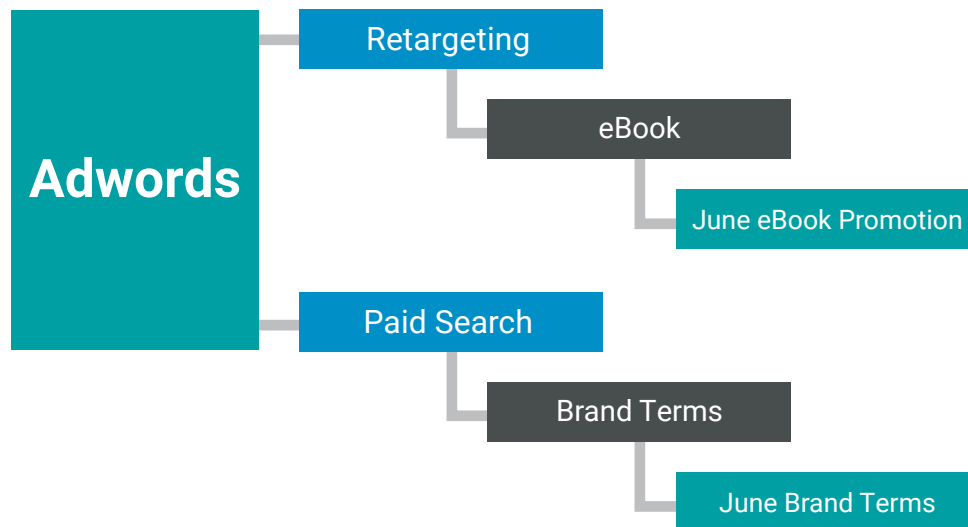
Those are:

- Advertising
- Direct Mail
- Email
- Telemarketing
- Banner Ads

- Seminar/Conference
- Public Relations
- Partners
- Referral Program
- Other

In today's world, it likely makes sense to delete some (like Direct Mail—although we are seeing a resurgence in its success) and add others. In particular, consider replacing advertising with something more nuanced like digital advertising.

The next step is to plan how you will use Campaign Hierarchies. In Salesforce you have the opportunity to have parent and child campaigns. What this looks like for each organization will differ, but here is an example of what one might implement:

```
                  ┌─ Retargeting
                  │         └─ eBook
  Adwords ────────┤                 └─ June eBook Promotion
                  │
                  └─ Paid Search
                           └─ Brand Terms
                                    └─ June Brand Terms
```

We recommend breaking down child campaigns on a monthly or quarterly basis. That will allow you to do more in-depth analysis of what campaigns were most successful and why.

How to Track the ROI of Qualified Leads

Great news, if you are using a marketing automation tool to pump leads into Salesforce (and update them as they revisit your site) then the heavy lifting is probably being taken care of for you. The caveat being, you need to ensure you are creating your new campaigns in Salesforce (so they appear in your marketing automation platform) and you are setting up your landing pages and urls to ensure they are getting recorded.

Also, don't limit your campaigns to paid advertising and landing pages. Outbound email efforts should have campaigns as well, and so should calling blitzes. For example, if you send a coupon offer to 5,000 lucky recipients, add them to a campaign.

Tracking the ROI of Campaigns

When tracking the ROI of campaigns, a common mistake is to give too much weight to last touch or first touch attribution. Today's buyer is more sophisticated, as is the typical sales cycle. We now know it takes many touches to a make a sale. Which is why tracking attribution versus last touch or first touch is so important.

Most Opportunities are impacted by more than one Campaign. For example, in most cases it's an oversimplification to say, "The coupon we sent that lead was the reason they decided to buy." Often, it's a combination of a coupon, a cold call, sending them a piece of collateral, etc.

In Salesforce, you can associate multiple influential Campaigns to a single Opportunity. This enables your organization to understand holistically what it took to push that prospect through the sales funnel.

You can easily view reports on which Campaigns influenced Opportunities as either standalone reports, or as part of a marketing dashboard. These reports can illustrate the value of pipeline influenced, campaign ROI (including total opportunities won, the cost of the campaign, exact ROI and even cost per customer) and more. Marketers have long struggled to quantify the value their efforts and budgets deliver, but Salesforce's Campaigns go a long way in helping demonstrate where and when Marketing is increasing sales.

How to Customize Campaign Influence in Salesforce

First you will need to ensure *Campaign Influence* is enabled in your instance. Go to Settings and search for *Campaign Influence*, then click into that feature. Ensure the feature is enabled and also that auto-association is enabled.

The biggest decision you need to make is how long the eligibility limit for campaign influence is. Essentially how many days after a campaign touches a contact should it be considered to have helped with the sale. We often use 180 days, but many organizations have a much shorter (or even longer) period.

Salesforce provides a great guide for organizations deploying Campaigns. You can get a copy here. (http://bit.ly/campaignsguide).
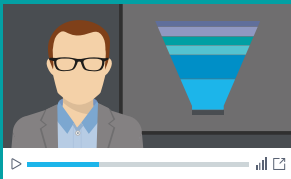
CHAPTER 7

The Ultimate Sales Enablement Resource Guide

We've put together a list of the key pieces of sales enablement collateral your organization should be using. This chapter is applicable to both founders looking to support their Sales team, or individual Sales reps looking for inspiration.

Product Explainer Videos

The audience for this piece is a lead that doesn't know much about your company or product. A short video is a powerful and engaging way to explain what you're selling.

- This is **not** the same as a product demo video.

- The goal of a Product Explainer video is to convey a complex concept (your product's value proposition) in an easy to understand way, in a very short period of time. A good one should require almost no background knowledge of the product in question, be interesting and the best ones often don't show the product at all.

- Do it yourself vs. hiring professionals vs. crowd sourced.

First Call Deck

A lead's interested enough that they've agreed to an initial call, this deck is what should be covered on that call. At this point, you should have a basic level of information about them that you can use to tailor the story you tell to address their pain points (while going through the deck).

- 8–12 slides.

- Make them interesting—don't read your slides.

- Get to the point—no one wants your life story.

- Reflect your positioning, branding and messaging.

- No one cares about the technical details.

- Tell stories. Ask questions.

- Don't rush to a demo. Get what you need to know to give a great demo.

Product Sheets

A lead is ready to learn more about your company/product and they need a document to review and perhaps share to other decision makers in their organization.

- Be strategic—solve a problem, not ALL the problems.
- Be creative—have a great headline and be interesting.
- Include your Value Proposition—why they should buy.
- Speak like a person—eliminate unnecessary jargon.
- Design with purpose—strong headline, appropriate images.
- Pay a designer to build a template for you.
- Include a testimonial—use a real customer (ask permission).
- Include a Call To Action—multiple ways to contact you, including phone, email, website (landing page).

What NOT to do

We've seen some pretty bad product sheets in our time, so along with an example of what to do, we also want to mention what to avoid.

Don't use every inch of the page, whitespace is ok. Cramming a page full of text isn't effective. Use bullets, charts, graphs to make information accessible and don't worry about saying it all. Focus on what's most important, ultimately you want the final product to be easy to digest.

Don't use clipart or cliché stock photos. Your goal is for your product sheet to stand out, so be authentic.

MY DESKTOP

SHARED DRIVE

Ensure your product sheet is easily accessible by Sales in the places they are mostly likely to be reminded of its existence.

Cases

At this stage, the prospect is very engaged, but now you need to show them how others have succeeded with your product or how you've solved very specific pain points for a client.

Case Studies:

- Provide peace of mind—customers don't want to be first.

- Use real customers—recognized brands and industry leaders.

- Follow the formula—Problem > Solution > Results

- **Problem**
  · be specific about the challenge or goal

- **Solution**
  · discuss how and why your product worked

- **Results**
  · specific metrics: time, cost, improve/reduce

Use Cases:

- Be specific—the problem you are solving or opportunity you are creating.

- Identify who will use/benefit from the product or solution.

- Describe the methodology for success.

- Build credibility—offer internal metrics to support case.

Sales Proposal

If you're presenting a prospect with a Sales proposal you've hit the negotiation phase. In order to hold their attention, make this document a scope piece that's accessible and easy to read. You may have a page or so of legal, but try not to slow down their acceptance by sending them a 20 page document with lots of arcane details.

- Build a template—executive summary, proposed solution, price.

- Have standardized pricing.

- Make discounts consistent and ensure everyone internally understands them.

- Legal—service-level agreements (SLAs) may be part of the proposal.

Sales Contract

The sales contract is a balance between including enough legal wording that you're covered but keeping this document readable. Don't forget to work in things like the rights to use their testimonial and logo on your website, in proposals, and in collateral. Some larger clients may redline these sections out, which is fine, but most won't.

- This is a legal document.

- Be prepared.

- Invest in a lawyer—but set a budget in advance.

- Negotiate—know your limits. Walk away from bad deals.

- What else may be in it for you? It's not always about money.

- When is the sale complete?

- How (and when) are you getting paid?

Conclusion

After a decade of working with B2B SaaS organizations, two of the biggest gaps we consistently see are in lead generation and sales enablement best practices. Our motivation behind writing this eBook was to give fast growing SaaS companies a free resource to help fill this gap.

Lead Generation is a pretty obvious investment for most organizations. It's hard to close sales if you have no leads. An often forgotten metric in the SaaS space is sales velocity. Which is specifically important for SaaS companies, because every day a sale doesn't close, is money lost in MRR. Follow the lead generation and sales enablement tips and best practices in this eBook to help you sell more and scale faster.

We hope you find this eBook helpful. As always, if you have any questions, reach out today.

Interested in knowing more about how organizations are using Salesforce and marketing automation to close sales more quickly?

Call us or check us out online:

CloudKettle

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