# Outbound Prospecting Toolkit

Everything You Need to Prospect for Leads in Your Database

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# Outbound Prospecting Fundamentals

## Conducting an outbound campaign to generate pipeline

Outbound prospecting is an extremely effective tactic for generating leads from a targeted list of prospects that involves using personalized email and the phone to proactively reach out to prospects in your database. With outbound prospecting, one-to-one phone and email communication is critical.

This Toolkit will help you understand the basic concepts, best practices, and tools required to fill your pipeline and meet or exceed your revenue goals.

## Three Things You Need to Know

**1. What it is**
Outbound prospecting allows companies to target and engage leads using the phone and email.

**2. Why it's important**
A recent survey found that **this is the most effective form** of B2B lead generation (Marketing Profs).

**3. How to do it**
Everything you need, including the essential tools and best practices required to build and execute your campaign, is included in this toolkit.

## What's Inside

| | |
|---|---|
| **Outbound Prospecting Basics** | How to run a campaign in six simple steps. |
| **Outbound Prospecting Best Practices** | Eight best practices to increase your "touch-to-appointment" conversion rate. |
| **Outbound Prospecting Tools** | The tools you need to generate sales pipeline. |

# Outbound Prospecting Basics

## How to execute an outbound campaign in 6 steps

To grow your business, you must reach existing customers with new solution offerings and introduce your business to new customers. Modern sales and marketing organizations are continuously executing outbound prospecting campaigns to meet these objectives.

### The Outbound Prospecting Process

| | | |
|---|---|---|
| 1 | **Plan your campaign** | Identify target buyers, what you will message to them, the campaign assets you'll need, and the campaign schedule. |
| 2 | **Build your list** | Create a list from your database. Use the VMware Marketing Database Toolkit to help you, if necessary. |
| 3 | **Research your prospect** | Do 3-5 minutes of research on each prospect. Look for information in your CRM system, social networks such as LinkedIn, and the prospect's website. |
| 4 | **Execute a multi-touch pattern** | Make at least 8 phone and email touches against each targeted prospect over a 2-week period until you connect. Each touch increases your odds of connecting with the prospect. |
| 5 | **Close for the meeting** | Your goal is to schedule a meeting with the prospect. Every communication, be it voicemail, email, or social, should ask for a 15-30 minute meeting. |
| 6 | **Nurture unresponsive prospects** | If a prospect is unresponsive after the initial 2-week campaign, continue to reach out via email and/or phone every 2-4 weeks. |

# Outbound Prospecting Best Practices

## Eight best practices proven to make your campaign more effective

### 1. Identify the right person

When calling into an account, try to determine who is the best person to speak with. Instead of asking for a person by title (e.g. the Director of IT), ask for the person in charge of the specific function you are targeting, such as datacenter infrastructure.

### 2. Cluster communications

Follow every voicemail with an email. Many buyers prefer to communicate via email today, but also still listen to voicemail. The voicemail/email combination can increase your email response rate by 10%.

### 3. Dedicate time to prospecting every day

Distractions kill prospecting, so make sure you set aside time every day, or pick a specific day of the week. Avoid unrelated meetings, emails, and phone calls during your dedicated prospecting times.

### 4. Set a prospecting goal

Set a goal for the number of calls and meaningful interactions you will make each day or week.

### 5. Call when the prospect is available

You are more likely to reach business buyers before 9AM and after 5PM. If you call during business hours, try to call at minute :02 or :58 of each hour to see if you can catch buyers between meetings.

### 6. Be engaging

Spend a few minutes before each call thinking about who the buyers are, what business they are in, and what they care about right now. Prospects are much more likely to engage with someone that is knowledgeable.

### 7. Always be helping

Instead of sending prospects your datasheet, try sending a market overview (even if it doesn't mention your company or product). Helping is the best way to earn trust and will allow you to pitch and close when the prospect is ready.

### 8. Manage your database

Your marketing database is essential to prospecting. Make sure you keep your database up to date, paying particular attention to prospect phone numbers and email addresses.

# Outbound Prospecting Tools

## The tools you need to get started

## What's Inside

| | |
|---|---|
| **Buyer Profile Template** | Use this profile to create a prospecting target list. |
| **Outbound Prospecting Pattern** | A series of voice, email and social-media touches designed to increase your chances of connecting with a prospect. |
| **Prospecting Email Template** | An easy-to-modify, highly targeted email template that you can send to prospects. |
| **Prospecting Voicemail Script** | Our script incorporates a number of best practices that will help you get prospects to respond to voicemails. |
| **Live Call Script** | A five-minute script to help you qualify the prospect and set a meeting. |
| **The Lead Handoff** | This tool helps you handoff leads to sales and register opportunities with VMware. |
| **The Outbound Prospecting Organization** | Learn how to best assign resources so that you can continuously prospect for leads. |
| **VMware Call-Out Day in a Box** | VMware regularly hosts call-out days for partners. Call-out days are a great way to spend dedicated time on outbound prospecting if you are not ready to continuously prospect. |

# Buyer Profile Template

Your database contains prospects and customers who are excellent candidates for outbound prospecting. Fill out the following table to identify prospects to target with your outbound efforts. You can then use the table to create a targeted list.

## Example Buyer Profile Template for VMware vSphere with Operations Management*

| Criteria | Target | Notes |
|---|---|---|
| **Title** | VP, Director, Admin, Analyst | Most IT titles are suitable for vSphere with Operations Management campaigns |
| **Role** | IT infrastructure | Buyers should have words like IT, Operations, Infrastructure, Architect, etc. in their titles |
| **IT environment** | >50 virtual machines | Good prospects be running 50 or more virtual machines |
| **Past purchases** | vSphere Standard or higher | Should not be a customer of vCenter with Operations Management |
| **Industry** | Finance, Tech, Business Services, Government, Healthcare, Education | Knowledge industries are well-suited for vSphere with Operations Management campaigns |

*VMware campaigns will have buyer profiles for each solution included in the campaign playbook.

# Outbound Prospecting Pattern

## Use this pattern to touch prospects at least 8 times in 2 weeks, until connected

In order to connect with today's buyer, you should use a standard prospecting pattern that mixes different forms of communication. This approach provides you with more opportunities to reach the prospect while building name and brand recognition throughout each touch.

### Outbound Prospecting Pattern

| Attempt | Business Day | Step | Description |
|---|---|---|---|
| 1 | 1 | Zero out to operator | Try to contact prospect live. If no contact, zero out to operator, validate contact info, and ask to schedule time with prospect. |
| 4 | 1 | Triple touch | Use combination of voicemail, email, and LinkedIn InMail spaced within minutes of each other. |
| 5 | 3 | Zero out | Try to contact prospect live. If no contact, zero out to operator and ask to schedule time with prospect. |
| 8 | 3 | Double touch | Use combination of voicemail and email spaced within minutes of each other. |
| 9 | 6 | Zero out | Try to contact prospect live. If no contact, zero out to operator and ask to schedule time with prospect. |
| 12 | 6 | Double touch | Use combination of voicemail and email spaced within minutes of each other. |
| 15 | 9 | "Dear John" triple touch | Use combination of voicemail, email, and InMail to conduct final outreach and note that you will no longer be contacting. |
| Ongoing | Ongoing | Nurture | Send emails and InMails with value-add content every 2-3 weeks. |

# Prospecting Email Template

## Sending emails that get prospects to respond

Email is critical to reaching buyers because that is how buyers prefer to communicate. When creating and sending emails to leads, remember the following best practices:

1. Create personal subject lines for each of the emails that you send.
2. Always include a call to action to schedule a brief call in your email..
3. Keep the email short – the prospect should be able to read it in less than 30 seconds.

Use the following template as the foundation of your prospecting emails.

### Prospecting Email Template

Dear <Prospect First Name>,

This is <First and Last Name> from <Partner Name>. As you may know, we <insert the relevant personal connection i.e. "support your data-center virtualization efforts">.

I'd like to set up a brief phone call to understand your current environment and discuss how <relevant VMware solution i.e. VMware vSphere with Operations Management> may be able to help <Prospect's Company>. During the conversation, I can provide examples of how companies such as yours are realizing greater IT performance, availability, and agility while doubling IT savings.

Just let me know a couple days/times that work for you, and I will make one work on my end.

I look forward to our conversation.

<First Name>


<First and Last Name>

<Company Name>

<Phone number – direct line>

<Email address>

<Link to http://www.partner.com>

# Prospecting Voicemail Script

## Leaving voicemails that get prospects to respond

90% of your prospecting calls will end in voicemail. IT professionals simply don't answer the phone as much as they used to. Even so, voicemail can be a very effective tool, particularly when combined with email-based outreach. Utilize the following best practices when leaving a voicemail:

1. Keep voicemails to 25 seconds or less.
2. Clearly state the purpose of your call – to have a brief phone conversation.
3. Be sure to reference the email you sent and ask for a response.

The following script will help you leave more effective prospecting voicemails.

### Prospecting Voicemail Script

Hi <First Name of Prospect>, this is <First and Last Name> from <Partner Name>.

As you may know, we <relevant personal connection i.e. "support your data-center virtualization efforts">.

The purpose of my call is to schedule a brief conversation to learn more about your current IT priorities and direct you to resources that can help you with your virtualization initiatives.

I will also be sending you an email with more details. Please reply to that and let me know a good time to talk.

Again, this is <First and Last Name> from <Partner Name> at <phone number>.

*Note: If you have not already sent the prospect an email, make sure you send an email immediately after leaving this voicemail.*

# Live Call Script

## How to set a meeting and qualify a prospect on the first call

When you first connect with a prospect on the phone, you have two objectives:

1. Qualify the lead as a good fit for the relevant VMware solution.
2. If first objective is met, set an appointment for a 30-60 minute call where sales can introduce the solution or product.

There are a handful of best practices you should use when conducting a live call. First, try to keep the call less than five minutes, if possible. Second, make sure your tone is conversational. Third, give the lead a reason to meet with you. The following script can help you meet these goals.

### Lead Follow-Up Live Call Script

Hi <First Name of Prospect>, it's <Your Name> with <Your Company Name>. I saw that you recently downloaded some content about <relevant VMware solution > and I wanted to follow up.

I'd like to find a convenient time to schedule a 30-minute phone call to discuss your current IT infrastructure and tell you how <relevant VMware solution> has helped companies such as <Insert similar companies if possible>. We'd also like to offer you <relevant VMware offer>.

Is there a time that works for you? I'll make it work on my end.

Before we wrap up, can you answer just a few questions for me?

| Question | Answer |
|---|---|
| What are you responsible for at <company name>? | |
| How many virtual machines do you run? | |
| Are you interested in increasing availability, reducing IT costs, or improving performance? | |
| What is your timeframe for making a decision? | |
| How does budget work for something like this? | |

Thanks for that information. I'll send you a calendar invite confirming our meeting in the next few minutes.

We look forward to speaking with you then. Have a great day.

# The Lead Handoff

## Hand off a lead to sales and register it with VMware

Once you've qualified a lead and set a meeting appointment for sales, you need to hand the leadoff to sales directly. Try to do this immediately after your conversation with the lead.

### The Lead Handoff Process

| | |
|---|---|
| 1 | Now that you've scheduled a time for the lead to meet with sales, the first thing you should do is send a confirmation email to the lead and the salesperson. Make sure you note the location of the meeting or provide phone number that sales should use to reach the lead. |
| 2 | Update your CRM system immediately with any new demographic information such as phone number and business email address, as well as answers to qualifying questions that you asked on the call. |
| 3 | You should also send a brief email to the salesperson to whom the lead is assigned, updating them on the time of the call as well as providing any new information you have gathered. |
| 4 | One day prior to the meeting, send a reminder email to the lead confirming the meeting and stating that you are looking forward to it. |
| 5 | If the lead is a qualified and you have captured sufficient budget information, you should register it at VMware Partner Central. You can do this at http://www.vmware.com/partners/ |
| 6 | Sales can prepare for the meeting by reviewing Sales Bytes that VMware has created to help ensure productive lead conversations. http://increasesalesvmw.com/salesbytes |

## Meeting Confirmation Email (Send Right after Call)

Subject line:            Confirming Meeting with <Partner Name>,

Dear <Lead First Name>,

Thank you very much for speaking with me earlier.

This email is to confirm that <Salesperson Name> will call you on <date of meeting> at <time of meeting> to discuss how <relevant VMware solution e.g. VMware vSphere with Operations Management> can help <Lead's Company>.

If you have any questions in the meantime, just let us know. We look forward to speaking with you.

<First Name>


<First and Last Name>

<Company Name>

<Phone number – direct line>

<Email address>

<Link to http://www.partner.com>

## Lead Handoff to Sales Email

Hi <Salesperson Name>,

Earlier today, I spoke with <Lead's First and Last Name>. They are interested in meeting with you to learn more about <relevant VMware solution e.g. VMware vSphere with Operations Management>. You have a meeting with them at:
<Time and Date>

<Physical location or phone number>

Here's the qualification information I gathered for this lead:

| Question | Answer |
|---|---|
| What are you responsible for at <company name>? | <Answer> |
| How many virtual machines do you run? | <Answer> |
| Are you interested in increasing availability, reducing IT costs, or improving performance? | <Answer> |
| What is your timeframe for making a decision? | <Answer> |

| How does budget work for something like this? | <Answer> |
|---|---|

They're looking forward to meeting you. Thank you and let me know if you need anything else!

## Reminder Email (Send 24 Hours in Advance of Meeting)

Subject line:        Reminder of Meeting with <Partner Name>,

Dear <Prospect First Name>,

I'm just confirming that you and <Salesperson Name> are meeting tomorrow at <time of meeting>. <Salesperson Name> will call you then.

If you have any questions in the meantime, just let us know. Thank you.

<First Name>


<First and Last Name>

<Company Name>

<Phone number – direct line>

<Email address>

<Link to http://www.partner.com>

# The Outbound Prospecting Organization

## How to find a resource

You need to have personnel in place that can focus on outbound prospecting. You can use your sales team, an internal telemarketing resource, or an outsourced telemarketing resource. Whichever option you choose, use the following best practices:

1. Make sure the resource sets aside time each day to conduct outbound prospecting.
2. Use multiple phone and email touches to reach the lead over a two-week period.
3. On the first call, focus on qualifying the lead and setting an appointment for a full sales call.

Use the following table to understand the different options for assigning someone to conduct outbound prospecting.

### Outbound Prospecting Resource Options

| Option | Description |
| --- | --- |
| **Sales team** | You may have salespeople who already prospect for leads. If you do, make sure they are trained on this module and able to dedicate the time required to prospect the right way. |
| **Telemarketing team** | You may already have a resource for prospecting. Often, these are entry-level employees who start out qualifying leads and setting appointments for the sales organization. |
| **Third-party resource** | VMware has identified telemarketing firms that you can engage for outbound prospecting services on an outsourced basis. These firms specialize in prospecting and use proven best practices. More information is available from your VMware concierge, Partner Business Manager, or in Partner Central in the VMware Demand Center. |

# VMware Call-Out Day in a Box

To start outbound prospecting, you need to assign members of the sales team to reach out to a targeted list of leads. An easy way to get started is to participate in one of the VMware Call-Out Days.

VMware regularly conducts Call-Out Days to help partners uncover new opportunities, re-activate dormant customers, and acquire additional business. The program provides partners with the materials, tools, and incentives necessary to conduct effective outbound prospecting. To participate, you simply need to allocate a full day of calling for your sales team and bring your marketing database.

To learn how to participate in a VMware Call-Out Day, contact your Marketing Concierge or Partner Business Manager, or visit the VMware Demand Center in Partner Central.