

PROSPECTING PLATFORM TIPS

convergo

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Key Fundamentals Of A Successful Prospecting Strategy

- Set daily/weekly activity goals
- Block time
- Multiple touches
- Hone your skills

Formula For A Good Call/Email/Voicemail

1. Who you are
2. Your purpose: To set an appointment
3. Why they should meet with you

Learn To Listen

Follow all of your target accounts on social:



- LinkedIn



- Twitter



- Facebook

Block time each day to listen and engage:

- Early Morning
- Lunch
- Evening
- Weekends

Use these signals for a customized "because" statement.

When you get an appointment, remember these tips for setting up virtual meetings:

1. Don't send an hour-long meeting invite for a first-in meeting
2. Make sure to include the details for your video conferencing (i.e. Zoom) meeting in any meeting invites you send. Paste the meeting link in the calendar invite location.

Outreach Options



PHONE

This is still your #1 prospecting option.

Exude confidence

- Stand up
- Smile when you dial
- Be ready
- Ask for the virtual meeting
- “I have some ideas to share so I’ll send over a Zoom link. Is your email still...?”
- Leave “Because” voicemails



EMAIL

Write Emails For The Phone

- Compelling Subject Line
- Short Message
- The first two lines are critical
- Use the “because” formula



SOCIAL

DO NOT be salesy—especially with the first message(s)

- Connect with meaning
- Engage in conversation
- Ask for the appointment at the right time
- Use “because” statements



VIDEO

1. Use a similar “because” framework
    - This is ___ at ____
    - I’m reaching out today to set an appointment because…
    - Give the reason
    - Close for the appointment
2. Be friendly
3. Dress professionally

Video Prospecting Platforms

Drift

vidyard®

NEXT STEPS

Take Action

- Create a learning plan
- Daily Weekly Goals
- Call Blocks
- Social Activity Blocks
- Optimize your message

Hone Your Skills

- Read a chapter a day
- Maybe do a team read
- Consider **Fanatical Prospecting Training** for your team

