Grow faster with Outbound Sales Development.

Predictable Revenue

Your Checklist

The Sales Development Methodology

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This two-part methodology is designed to help companies build their go-to-market plan (*the principles*) and then go out and execute it (*the playbook*), all with the goal of ***achieving Predictable Revenue.***

Sales Development Principles

Positioning

Define your positioning

- [ ] Conduct competitor analysis. Who are your true competitors? What are they doing? What are people saying about them? How do you differentiate? What are your customers' competitive alternatives? How tough is your market? How commoditized is your product/service?
    - [ ] Draft your unique value proposition which encompasses your unique attributes, value, and proof. Which features and capabilities are unique to your solution? How does that make your customer's life easier? How does it help them achieve their goals? How does that help their business? Think: we help X person achieve Y outcome through Z process.

Define your targeting (Total Addressable Market (TAM), Serviceable Addressable Market (SAM), Serviceable Obtainable Market (SOM)) & segmentation

- [ ] What stage are you at? Problem-market fit or product-market fit?
- [ ] What are the defining factors of your Ideal Customer Profile (ICP)? What are the defining factors of each segment? How do they differ from one another?
- [ ] Which buyer personas should you target? How many people can you target within an account? Who makes up the buying committee? What are their titles?

Pace

- [ ] Conduct market research. Read industry reports, learn about trends, developments, and innovation. Figure out where these customers consume and create content, what channels they use for communication, and how they like to be sold to.
- [ ] Conduct company research. Learn about the types.
- [ ] Conduct persona research. Look at job postings, LinkedIn job descriptions and about sections, and articles and blog posts authored by your target persona to understand what they care about, the goals they are trying to achieve, and the language they use.
- [ ] How does my ICP like to do business?
- [ ] What is my ideal CAC? How much can I reasonably spend on customer acquisition?
- [ ] What is my current ACV? Should I set an outbound minimum deal size?
- [ ] What prospecting style (if any) makes sense for my ICP & CAC: account-based, persona-based, use-case-based?

Practice

- [ ] Align on mindset.
    - [ ] Are all senior leaders and sales development stakeholders aligned when it comes to positioning, GTM process, mindset, timelines, resources required to get sales development right the first time?
- [ ] Align the revenue team.
    - [ ] Compile/create your minimal viable marketing and sales assets.
    - [ ] Is your website useful? Can visitors understand what you do in 8 seconds or less? Can they navigate easily to customer testimonials, solutions by industries, use-cases, press, resources, etc? Can they find where to contact you?
    - [ ] Do your customer stories/testimonials/case studies clearly present the problem, solution, result for your customers? Can you hear the Voice of the Customer through them? Is this done in a way that aligns with your positioning and the way your ICP likes to do business?
    - [ ] Do your customers want/need one-pagers?
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    - [ ] Do your customers want/need one-pagers?
- [ ] Create feedback loops.
    - [ ] Do you have feedback loops that will indicate if part of the strategy is not working? Does every employee understand to whom they should bring potentially issues/challenges? Do leaders encourage constructive criticism and innovation from their employees? How is feedback incentivized or deterred?
- [ ] Build a team.
    - [ ] Define the tasks you need employees to complete. Are they going to be making cold calls? Crafting LinkedIn messages? Writing emails? Building long-lasting relationships with lifelong customers? Building sales playbooks? Setting up and optimizing your tech stack? Onboarding customers? What else?
    - [ ] Document the skills required to complete these tasks successfully. Do you need someone tech-savvy? A strong communicator? Someone with experience or transferable experience copywriting or cold calling?
    - [ ] Decide on the behaviours or soft skills your employees need to get their tasks complete and to fit into the culture of your company. Do you need someone fearless, persistent, tenacious, driven, creative? Do you need someone empathetic, understanding, thoughtful, reflective? Do you need someone steadfast, analytical, and organized?
    - [ ] Build a team that suits your needs and budget. Do you need full cycle salespeople? Dedicated prospectors and closers? How many of each? What ratio? Do you need both customer success and account management people? Do you need sales enablement, sales management, team leads?

Predictable Revenue

Sales Development Playbook

Targeting

- [ ] What is your ideal customer profile? What criteria do companies need to meet in order to be a strong fit for your solution? What headcount, what revenue, what tools must they be using, etc?
- [ ] Who is your ideal buyer persona? What is their title? Their seniority level? Department?
- [ ] Who else might you prospect? Who makes up the buying committee? Who could influence your buyer, who could be a detractor, who could be a champion?
- [ ] How can you segment your lists into smaller groups of like users so that you can target with a 1:many approach that is timely and relevant and feels 1:1? What are the jobs-to-be-done, pain points, and aspirations for buyers in each segment? What differentiates one segment from another?
- [ ] Where can you reliably and affordably source contact information for these prospects? Is this information on websites, in online directories, or available for purchase through large or boutique data providers? Should you outsource your list-building or hire a researcher in-house? Should your prospectors build their own lists?
- [ ] What information do you need to have about a prospect before you can effectively reach out?

Tools

- [ ] What are the basic tools that you need to get started? What kind of budget do you have for tool stack? Which tools suit your needs best? Should we buy a separate CRM and engagement tool so that reporting is easier and data is more accessible, or do we need a less expensive tool that combines the two functions?
- [ ] How much are you going to automate in your outreach? What can you automate? What volume of outreach do you need your prospectors to do to meet your opportunity and revenue goals? What tools will help you do that?
- [ ] Where do your prospects spend their time? How do they like to be prospected? How do they like to do business? Which channels will you use to reach your prospects? What tools will help you do that?

Prospecting

- [ ] Which channels are you using to reach your prospects?
- [ ] What type of language do your prospects use? Are they technically inclined, creative, analytical? How can you leverage this into your outreach?
- [ ] How the research you've done on industries/markets/companies/personas/competitors inform your outreach?
- [ ] What benchmarks must you try to surpass with your outreach? What is the minimum open rate, reply rate, conversion rate, etc that a touch point must meet before you reassess and try something else?
- [ ] What is the best process for experimentation? Who is in charge of experimentation? How do you make sure data is clean and learnings are captured? How do you document learnings? Who documents learnings? How do you disseminate learnings amongst the team? What are other prospectors in your industry doing that works?

Qualification

- ☐ What baseline criteria must a prospect meet before they are considered an opportunity? What do I need to know about the company they work for, potential use-cases or projects, the technology they use that you integrate with, their pain points and priorities?
- ☐ How can you create an AWAF call script that blends your AWAF questions naturally into the conversation?
- ☐ How can you reduce no show rate? How can you increase opportunity quality? If an opportunity falls outside of the usual qualification criteria but might still be a great opportunity, who makes the final call?

Follow-Through

- ☐ What templates and scripts can you create to make the hand off process more frictionless and standardized? What information needs to be filled in in the CRM?
- ☐ How and why are opportunities accepted/rejected? How is feedback given on opportunity quality?
- ☐ What happens after an opportunity is qualified to ensure it makes it through the pipeline?

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