# 4 Data Insights for Effective Outbound Sales Prospecting

## Executive Summary

Marketing data that's generated through inbound marketing forms and placed into a customer relationship management (CRM) system or marketing automation software is not designed for outbound sales prospecting. Before sales teams can start reaching out to prospects, they need to spend time filling in the gaps of missing data that's not important to marketing but is critical to the outbound sales process.

Critical Data Needs for Marketing vs. Sales

| Critical Data Needs | Marketing | Sales |
|---|---|---|
| **Lead generation** | Inbound lead capture | Outbound phone prospecting |
| **Key contact field** | Email address | Direct dial telephone number |
| **Data focus** | Segmentation, personalization | Qualification, ability to contact |
| **Primary KPIs** | Opens, clicks, conversions | Dials, quality connects, conversions |

## Marketing and Sales Have Different Data Needs

### Email Address is the Key Field for Marketing, Not Sales

Most B2B companies have outbound and inbound lead generation channels. Since email is the most commonly used communication method for marketing teams, lead generation campaigns focus on obtaining an email address (along with first and last names) as the key data field to be added into the CRM. As the lead converts to a contact and is transferred to a business development rep (BDR) to qualify, additional information will be added to the record.

As the inside sales function grows and companies look for ways to accelerate the sales process, BDRs are tasked with quickly qualifying (or disqualifying) leads. One reason to contact prospects sooner is that studies have shown a lead has a better chance to convert to a sales opportunity when the lead is contacted in a timely manner by phone. However, if the key data field in the CRM is the email address and not a telephone number, how is the sales rep supposed to qualify that lead? They will often need to use social media or go to a company's website to find this information, which takes time they could be using to make the phone call. In addition to an email address, a phone number should be a required form field so the rep can make that early qualifying call.

## Segmentation vs. Qualification

B2B marketing teams use segmentation and personalization strategies to achieve relevance for content offers and messaging. In order to create these targeted campaigns, marketers use "firmographic" data to create mailing lists.

**What's firmographic data?**

- Vertical industry
- Company size
- Annual revenue
- Function

Personalized marketing campaigns like Google retargeting use a prospect's past activities—including internet keyword searches, online purchases, and social media activity—to generate personalized messages. For example, Google serves display ads based on the websites people visit and Amazon presents product ideas based on previous purchases or search inquiries.

The information about internet searches, purchases, and social media activity is helpful, but not critical to the BDR or inside sales reps making prospecting calls. They are more interested in knowing if the prospect is using a competitive product, when a contract expires, or who the key decision makers may be for a purchase. This is the data criteria that helps sales reps to be more productive when they get the decision maker on the phone.

## Contrasting Key Performance Indicators (KPIs)

Marketing automation systems are valuable tools for their ability to record activities and track revenue back to the initial lead source. This data provides marketing and business executives with the ability to identify top performing campaigns and adjust marketing expenses as needed, based on performance and return on investment (ROI).

**Common Marketing KPIs:**

- Email opens
- Click-through rates
- Form completions (Conversion to a prospect)
- Number of conversions from a prospect to a Marketing Qualified Lead (MQL)

**Common Outbound Sales KPIs:**

- Dials made
- Dials connected
- Quality connects (having a positive conversation or getting a referral)
- Length of conversations
- Number of conversions from a Sales Qualified Lead (SQL) to a customer (Closed Won)

To help marketing and sales work together, CRM systems should be able to track and report on both data sets. Often, businesses that generate high volumes of inbound leads have teams dedicated to the qualification process. The data points that are discovered during these outbound calls should be used to evaluate the quality of the lead as well as the effectiveness of the marketing campaign that brought in that lead. If marketing is generating a high volume of leads, but the lead qualifiers find that they're unable to connect with those leads, the data provided is wrong, or none of the leads convert, then the marketing campaign needs to be reconfigured. However, if marketing is generating a high volume of leads, but the lead qualifiers don't connect with them in a timely fashion due to being busy, then that is on the outbound callers and sales rather than on marketing as the value of leads diminish over time.

## Four Data Insights Your Sales Prospecting Team Needs

### 1. Buying Intent Data

Sales reps should know what products or solutions a prospect is intending to buy before making that outbound sales call. Because these data points are compiled from outbound searches, B2B sales professionals can target businesses that have indicated they are actively searching for your product or service.

**How Prospects Demonstrate Intent Through Outbound Marketing:**

- Download a whitepaper
- Search the web for specific products or ways to do things
- Update online profiles: corporate, LinkedIn, alumni, trade, or industry association
- Join a group or contribute to a discussion on LinkedIn or chat groups
- Ask a question online or search for information
- Buy something online

### 2. Data Accuracy

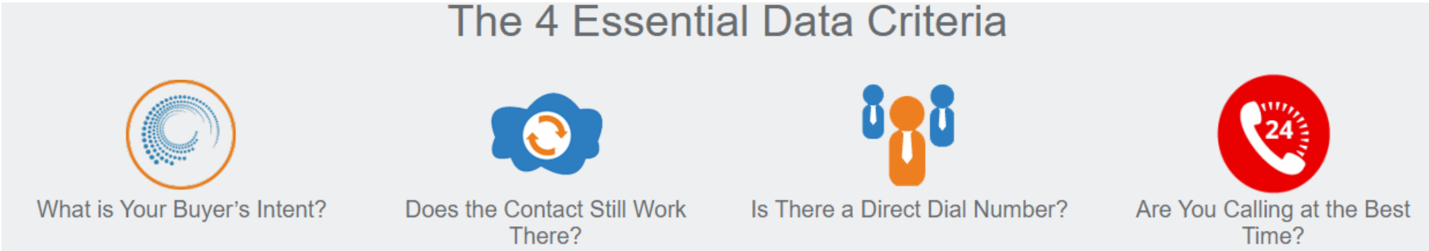
Is the prospect on your list even still with that company? Calling old data lists can greatly reduce connect rates and increase sales costs, so it's critical that that all the data in your CRM is complete and accurate.

### 3. Direct Dial Phone Numbers

Calling into a main telephone number can be a nightmare and waste of time for sales reps doing outbound prospecting. The availability of a direct dial phone number can greatly improve the sales rep's potential for a meaningful sales conversation. Outbound sales reps should know in advance if the number they are calling is a direct dial number. If so, they can focus on making those calls first and save the ones where they'll have to deal with gatekeepers or voice mail systems for later in the day. If the direct dial number is not already in the CRM, the rep can try to obtain it from a gatekeeper or purchase it from a third-party data provider.

### 4. Best Time to Call

To determine the best time to make prospecting calls, you should look into your own company's own dialing records. Knowing which area code or geographic zone picks up at which time can increase the possibility of having the phone answered. This data is not often captured via outbound calling systems unless a system has been developed by an internal IT group, or a third-party sales dialing automation system is used.




## What You Need: Sales Intelligence

Adaptilytics® by ConnectLeader is a predictive intelligence engine that analyzes, prioritizes, and scores outbound prospecting lists. Users can create their own ideal customer profile based on multiple data insights such as a prospect's intent to buy, data accuracy, direct dial number, and best time to reach a prospect at that company.

"The majority of an outbound caller's prospecting time is wasted on manually dialing incorrect numbers in an attempt to reach contacts—if they are even still with the company—only to ask annoying profiling questions," said Senraj Soundar, Founder and CEO, ConnectLeader. "Adaptilytics addresses this long-standing issue by placing essential profiling data right at each sales rep's fingertips. Having accurate profiles ensures more meaningful conversations with potential buyers and dramatically increases the number of qualified leads entering the pipeline."

**About the ConnectLeader Intelligent Sales Automation Platform**

Adaptilytics is fully integrated with ConnectLeader's full sales engagement platform: TruCadence, TruInbound, Team Dialer® and Personal Dialer® to accelerate the calling process with improved targeting for marketing and sales, connectivity, and sales productivity.

ConnectLeader empowers sales reps to give the sales team what they need to consistently exceed their quota: an integrated, all-in-one suite of sales automation tools that puts customers in front of the accounts they need to engage with, both systematically and in an accelerated mode.

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