



THE MARKETING LAB

# How I Manage New Sales Development Campaigns

A lesson in project management when developing a sales pipeline from scratch...

*With me today...*



Meredith Eisenberg

*“A goal without a plan is just a wish.”*

*~ Antoine de Saint-Exupery*



## **Start Here:**

*What outcomes are you trying to create  
within your email campaign?*

Instructions	<b>Prospect Value Calculator</b>				
<p><b>Step 1:</b> Click -&gt; File -&gt; Make a Copy to get your own editable version of this document. (note you can also Download as an Excel document if you prefer through 'File' -&gt; 'Download')</p>	Marketing & Sales KPI Calculator		<b>Monthly Prospecting Goal</b> (this will auto-calculate)		
<p><b>Step 2:</b> Fill in Cells E5 and E6 as best you can for your business. This will tell us how much revenue you'd expect to collect from the new client goal you've set for next year.</p> <p><i>Note: This cell will auto-calculate based on your numbers above.</i></p>	---->	Goal for How Many New Clients You'd Like to Close This Year Average Lifetime Value of a New Client Expected Total Revenue from Clients You Close Next Year:	6 \$40,000 \$240,000.00	Prospects You Must Add to Your List Each Month	50
<p><b>Step 3:</b> Fill in E9 and E10 as best you can for your business. (if you aren't sure of your Conversion to Call %...use 10% as a starting point.)</p> <p><i>Note: This cell will auto-calculate based on your numbers above.</i></p> <p><i>Note: This cell will auto-calculate based on your numbers above.</i></p>	---->	Closing Percentage (Booked Call -> New Client) Conversion to Call (Prospect on List -> Booked Call) Appointments Needed: Prospects Needed:	10% 10% 60 600		
<p><i>Note: This cell will auto-calculate based on your numbers above and will tell you the estimated dollar amount each individual prospect you add to your list is worth to your business next year.</i></p>	---->	<b>\$ Value of Each Prospect ----&gt;</b>	<b>\$400.00</b>		
<b>By Adding 20 New Prospects to My List I Should Generate ----&gt;</b>					
<b>By Adding 50 New Prospects to My List I Should Generate ----&gt;</b>					

Download at:

[Connect365.io/pvc](https://connect365.io/pvc)

*First*

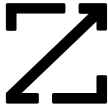
Choose your path for prospecting.

**Linked** 



getprospect

 **Seamless.AI**



**zoominfo**

# 3 Primary Phases

1. Pre-Prospecting (prep)
2. List Building
3. Messaging

*Length:* 10-25 days (depending on volume)

# Prep Work (Pre-Prospecting)



# Prep Work

## (Pre-Prospecting)

- Prospect Profile
- Content Strategy
- Profile Optimization

A good template to begin with:

[title], [company name] | We help  
[avatar] [benefit] [how]



Neil Kemp • 1st

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Joan Stewart

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## Remember

Good prep is done sparingly and saves time.  
*(and reduces chaos)*

# List Building

1. Build Search.
2. Write Connection Request Message.
3. Connection Request.
4. Add Email (24-48 hr later).



# Connect 365 Campaign Management Template

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	A	B	C	D	E	F	G	H
1			# Contacts Added	Date Added	(est) Last Message Date	Classification Tag	Status Tag	Next Step?
2	Campaign Name:					0		
3	Campaign Tag:							
4	Campaign Type:							
5	Length of Campaign:							
6								
7								
8								
9	<b>NOTE:</b>	<i>Click File -&gt; "Make a Copy" to get a version that you can edit.</i>						
10								

Add  more rows at bottom.

+ ≡ Template ▾ Example ▾ Example 2 ▾

Download at:

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# Benchmarks

- <20-25% accepted within 48 hrs = Low
- 35% accepted within 48 hrs = Average
- 45%+ within 48 hrs = Great

# Prospecting Rules of Engagement

1. Set a weekly goal or challenge.
2. Move quickly.
  - a. Filter as best you can to Prospect Profile.
  - b. Vet further throughout process.
3. Make time.
4. Celebrate progress.



Next

Build one core evergreen sequence.

# Why?

- Repeatable
- Time Saver
- Consistent
- Gets You to Base Camp

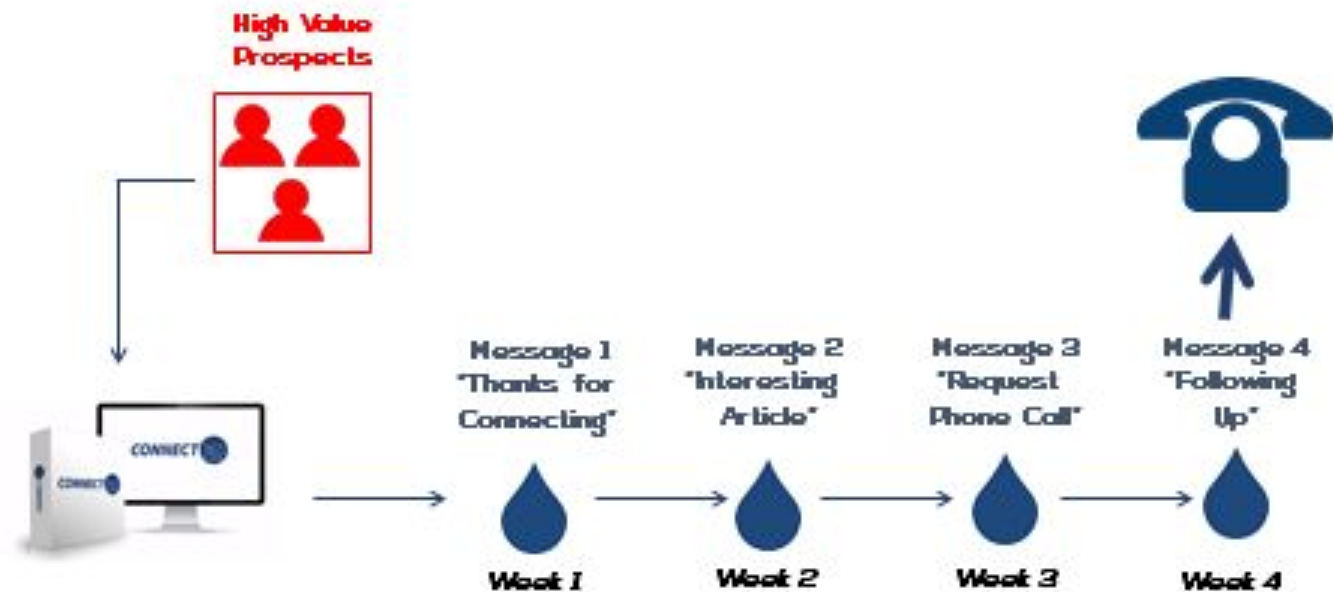
# Sequential Campaigns

Initial Outreach Campaign. (Social Media Boomerang)

*Length:* 10-25 days

*Keys to Success:* Reusable, Replenishable, Relevance

# Personal Messaging Campaign



The best part: The system is repeatable and reliable.



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# **What's Next?**

**Any task management advice?**

## A few quick thoughts...

*Send connection requests during workdays/hours.*

# A few quick thoughts...

*Blitz v. Slow & Steady*

## Key Concept:

*To begin with – the goal is to engage.*

# *The Progress Principle*

**Prospect -> Lead -> Client**

“Capturing small wins on *MEANINGFUL PROJECTS* every day enhances motivation and results.”

- Harvard Business Review

# General Email Rules:

- Email doesn't sell the product
- Not about you
  - Customer-centric and problem-oriented
- Stories over claims
  - Example vs. 'how we can 10x your ROI'
- Personalize efficiently
- Be short

**Questions???**

*On the next Mastermind:*



# Outbound Sales Mastery

## Discussing Budget

Call Held 5/19 at 1 pm (central)