

Cognism 

# THE ULTIMATE GUIDE

---

To Hacking B2B  
Lead Generation



Cognism 

# DEMAND GENERATION:

How to create demand  
that drives growth

# Contents

Why demand generation is vital for B2B growth	3
B2B demand generation strategies	5
A B2B marketer's guide to content marketing	12
How to plan your content	13
Keywords and SEO	17
How to amplify your content	19
Using content to close deals	22
Repurposing content	25
Measuring the success of content marketing	27
The must-track B2B marketing metrics for demand generation	30
Four strategies for B2B sales and marketing alignment	33
A blueprint for demand generation success	37

# Why demand generation is vital for B2B growth

Demand generation is a strategy for building awareness and driving interest in your product or service, with the overall aim of creating a predictable, repeatable pipeline for your business. It's a long-term endeavour, designed to reach consumers at every touchpoint of their buyer journey with your brand - from the very first moment when a prospect becomes aware of your company, all the way through to when they convert and become a fully paid-up customer, and even after this - turning customers into brand advocates.

## Six reasons why you need demand generation



### 1. It makes marketing customer-centric

Demand generation places the customer at the heart of your B2B marketing strategy. It's about making people excited and informed about your brand and product, so that they want to learn more. It's about building and nurturing relationships with consumers over the long-term. It's about giving people relevant and useful content that draws them in and guides them through the funnel.



### 2. It aligns marketing and sales

Demand generation is the bedrock of sales and marketing alignment. It brings together the two disciplines over a shared, common goal: the desire to attract new business and generate new revenue.

For scaling B2B companies who haven't yet prioritised sales and marketing alignment, demand generation is an excellent way to kick off the process. It gets both teams thinking about who their ideal customers are and what kinds of challenges they face - and helps to define which types of content would be most useful for solving those challenges.



### 3. It establishes consumer trust

Demand generation helps to establish your brand as one that people can trust. By providing value to your buyers, by sharing educational and inspirational content, it makes people view your business as one they can count on. Demand generation is a process that keeps people engaging with your brand, so even if they're not quite ready to buy from you right now, you'll be the first thing they think of when they are.



### 4. It produces high-quality leads

Demand generation gets you to focus on lead quality, rather than lead quantity. Demand generation works best when it's targeted and specific; the content you produce must revolve around your customers, defining the problems they encounter day-to-day and suggesting practical solutions. It helps you to understand who your ideal customers are, what they're looking for and where you can find them.



### 5. It generates predictable revenue

Put simply, demand generation will help you grow your B2B company. If you build interest in your business, and you capitalise on that interest with compelling and informative content, then your customer base will start to grow.

But demand generation doesn't just lead to revenue – it leads to predictable revenue. It will help you to construct a repeatable pipeline and gives you all the insights you need to make better, data-driven business decisions.



### 6. It delivers strong ROI

Last but not least, demand generation is cost-effective. You don't need huge marketing budgets to do it right. All you need is an understanding of your ideal customer and how your product or service can help them. The hard work of demand generation – creating and sharing content – is only as expensive as you want it to be.

As we'll find out later, there are all sorts of demand generation tricks and hacks that'll help you deliver your strategy without breaking the bank. So we can say that demand generation is the perfect choice for scaling B2B companies.

## Demand generation at Cognism

Cognism is a great example of a B2B organisation successfully deploying demand generation. With a small marketing team, we generated 50% of the company's new business MRR targets last year, which helped to grow our business from \$2.5 million ARR to \$7 million ARR.

Over the course of this guide, we're going to share our demand generation knowledge with you, so that you too can create demand that drives B2B growth.

Here's what you'll learn:

- ✓ What the most useful B2B demand generation strategies are.
- ✓ What content marketing is and how it can help you grow your business.
- ✓ How to plan and amplify your content to help you close more deals.
- ✓ How to measure the success of B2B demand generation, including the must-track marketing metrics.
- ✓ How to align your sales and marketing teams around demand generation.

Welcome to ***Demand generation: How to create demand that drives growth.***

## B2B demand generation strategies

Cognism 

We are going to focus this section on two cornerstones of B2B demand generation:

- Growth hacking.
- Content marketing.

We'll study each of these in turn. To kick us off, **Alice de Courcy**, Head of Marketing at **Cognism**, writes about growth hacking, what it is and how you can get started.



### A B2B marketer's guide to growth hacking

When you first hear the term "growth hacking", your mind fills with questions. Is it complicated? Does it work? Is it even legal?! While it sounds like a dark art, there is science and strategy behind growth hacking and it can be extremely effective when you get it right. For B2B startups that want to grow super-fast, but only have limited resources, growth hacking strategies can be a great choice.



#### Growth hacking defined

Growth hacking is the most recent iteration of demand generation. The term was coined by entrepreneur **Sean Ellis** in 2010; he's now the CEO of **GrowthHackers**, an online community dedicated to promoting the art and science of growth hacking.

In a nutshell, growth hacking is a branch of digital marketing where everything you do is designed to get the maximum number of users for the lowest possible outlay. The name is the clue; growth is everything! The "hacking" part refers to the unconventional, out-of-the-box ideas that companies try to achieve super-fast growth.



#### Who is growth hacking for?

Because it's about achieving a lot with a little, growth hacking is usually a method for startups and scaleups. They don't have the budgets for big advertising campaigns or star-studded product launches, so they have to get creative. For B2B and SaaS companies that often need to grow quickly to reassure investors, it's a popular strategy.



#### What does a growth hacker do?

As you might have guessed, a growth hacker focuses on growth. It's one of the fundamental umbrella metrics for B2B startups and that's all they need to care about.

Growth hackers don't have to be singular entities, either. Anyone can be a growth hacker as long as they have the right focus.

That means being adaptable, creative, analytical and finding unique ways of growing a company's user base.



## Growth hacking examples

There are many famous examples of companies using growth hacking successfully. Here are some of the most notable:



The online storage firm offered existing users extra capacity if they referred their friends.



The online travel app leveraged the classified site Craigslist to bring early users in quickly. Even when Craigslist found out what was going on and shut it down, it was too late, Airbnb users were hooked!



Google's email app started by invite only, which created massive FOMO in the tech community. Everyone wanted one!



The notes app started out with early funding woes, but due to giving away their basic service for free (the so-called "freemium" model), Evernote became a multi-million dollar company with over 75 million users.



## How to get started

The concept of growth hacking is not as anarchic as it sounds. It's based around a rigid structure, driven by data and managing only what you can measure. Here are the five steps to success:

### 1 Get your product right

Before you spend time and resources getting your product in front of as many people as possible, you have to make sure that it works. You want new users to love your product, not discard it immediately. Where possible, build in a network effect.

### 2 Set your goals

Set precise, measurable goals for your growth hacking campaign. If your goal is raising your number of users, define how many users you want to bring onboard. Before you start, work out what success looks like for you.



### 3 Test, test, test!

You can't run multiple growth hacking ideas at the same time, because you won't know which ones are working. Pick one growth hacking strategy and implement it quickly. Run these as structured experiments. Here is an example of one we recently held at Cognism:

**Hypothesis:**

We can capture Google leads for under \$300 optimising bidding for 2nd/3rd search positions and optimising landing pages for conversion on these specific search terms. We have also optimised keywords and will be bidding only on exact match.

**Design:**

Create a bespoke landing page for B2B lead generation

**Duration:**

2 weeks – run only on working days

**Budget:**

\$100 per day/per campaign. Total \$1000.00 USD budget

### 4 Analyse your results

Measure your idea against your predictions to decide if it worked. Then, move on to the next one. Let the data drive your growth hacking in the right direction.

### 5 Learn and improve

Perform more split tests to look for ways to improve your growth hacking campaign. Practice makes perfect.





**Growth hacking ideas**

There is an enormous number of growth hacking strategies out there. Some involve creating content that promotes your product and getting it out to as many people as possible. Others are about making your product appear more desirable, creating a buzz around it. Here are twelve ideas you can try:

**Create valuable and relevant content**

- Start a blog and update it regularly.
- Create the kind of content that your users can't wait to share with their network.
- In the early days, build authority by leveraging external experts and use their brand and distribution networks to gain traction.

**Go viral**

- Be everywhere on the social media channels that matter to your ideal customers!
- Create memes and videos that become a sensation.
- Focus on content that is brave, bold and cuts through the noise.

**Influencer marketing**

- Find social media personalities with big followings among your target audience.
- Ask them to contribute to your content and promote your brand.

**MVP marketing**

- When resources are limited, you need to focus carefully.
- If you have an idea for a piece of long-form content, for example, before you spend days creating it, write a short LinkedIn summary post on it and ask people to comment if they would like 'early bird access'.
- The traction you get here will be a good litmus test for the content's appeal and it only took you 30 minutes to discover.

**Contests and giveaways**

- People love to take part and win prizes!

**Incentives for referrals**

- If it worked for Dropbox, it can work for you!

## SEO

- Tactically include keywords in your blog content.
- The goal with SEO is to get your site ranked higher on Google and noticed by more people.
- It doesn't have to cost money, it just requires long-term commitment and a clear strategy. Get started early on.

## Email sequences

- Never underestimate the power of email marketing!
- Introduce your brand to your target audience through a series of emails.

## PR

- Get your product featured in relevant and widely-read publications.
- For B2B SaaS startups, a good option is **TechCrunch**.
- You can hack this early on by flipping the focus of your PR onto the key people in your business rather than the company. Build personal brands and tell your people stories.

## PPC or social media advertising

- Invest some budget in highly-targeted ads on Google and social media.
- Run tests in Ad sprints. Test, optimise and find your perfect combination to drive growth. You can learn a lot on just a small budget.

## Develop a tool

- A great way to hack growth is to build a free tool that will be useful to your target audience. It could be as simple as an email subject line simulator.
- Make sure it is something that will keep people coming back and which can have a lead capture mechanism built into it.
- If you can, get it featured on **Product Hunt**.

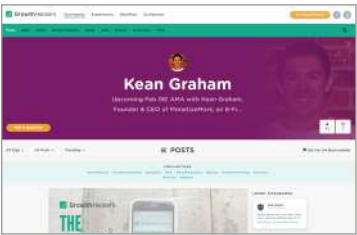
## Build a useful list of tools

- If you can, build a page that will drive unusual traffic to your website.
- Build a list of tools that are relevant to your target audience.
- Don't be afraid to feature competitor products and multiple vendors.
- Any list a vendor is on will give them a reason to share it. Leverage their audience to grow your own.



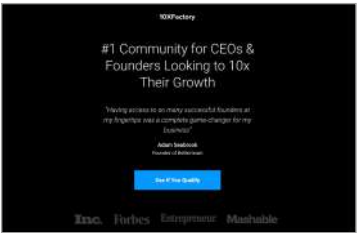
**Growth hacking online resources**

Besides ideas and strategies, there are lots of growth hacking resources out there to boost your knowledge.



**GrowthHackers**

Sean Ellis is the CEO of Growth Hackers and the site has a community full of advice and tips collated from the world wide web. If you want to keep up to date, this is the best place to be.



**10X Factory**

Have you heard of the 10X concept? It claims that the best engineers have to be "10x as productive as the worst". This fuelled the idea for 10X Factory; its Slack channel offers access to the best entrepreneurs in the world to ask questions and learn from other successful growth hackers.



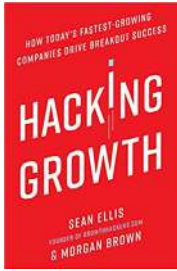
**r/GrowthHacking**

Where would we be without Reddit? The GrowthHacking subreddit is a bustling community covering all kinds of topics related to growth hacking and digital marketing.



## Growth hacking library

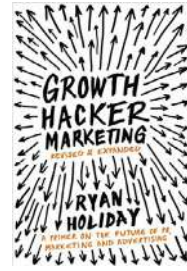
If you'd prefer to fill your bookshelf, here are some essential growth hacking books to add to your collection:



**Hacking Growth:  
How Today's  
Fastest-Growing  
Companies Drive  
Breakout Success**



**The Growth  
Marketer's Playbook:  
A Strategic Guide to  
Growing a Business in  
Today's Digital World**



**Growth Hacker  
Marketing: A Primer  
on the Future of  
PR, Marketing,  
and Advertising**

## A B2B marketer's guide to content marketing

The second pillar which is core to any B2B demand generation strategy is content marketing. It's an area of B2B marketing which is growing in importance year on year. And with good reason - it's becoming an integral weapon in the business arsenal, with its capacity to delight audiences, convert customers and deliver strong ROI.

### B2B content marketing stats and facts

- According to the **B2B Content Marketing 2019 Report**, commissioned by the Content Marketing Institute and MarketingProfs, 58% of B2B marketers spent more on content creation in 2018 than in any other year.
- Compared to traditional marketing methods, **content marketing costs 62% less** and, in terms of B2B lead generation, generates around three times the number of leads.
- On average, brands that use content marketing achieve conversion rates **six times higher** than those that don't.
- Salesforce UK set up a Social Success content site containing blogs, interviews, eBooks and videos. Three months later they were seeing **incredible results**: an 80% increase in traffic, 10,000 eBook downloads and 6,500 newsletter sign-ups. So even the big brands recognise the value of content marketing!

### Why has B2B content marketing exploded?

Because it can deliver a raft of benefits to a business:

- **It builds brand awareness** - content is a highly effective and low-cost way of promoting your brand and attracting customers.
- **It creates backlinks** - if you have quality content on your website, then other websites will want to link their content with yours - increasing your own website's ranking.
- **It's the engine for good SEO** - quality content, fully optimised with relevant keywords, will ensure your company's website stays at the top of a search engine page.
- **It creates loyal customers** - if you keep providing insightful content, you'll build a fanbase who'll keep engaging and coming back to your brand, every single time.
- **It generates new leads and business** - content marketing ensures that your brand will be found by buyers and helps to convert them into customers.

Read on for a full end-to-end guide to B2B content marketing, from planning all the way to activation and measuring the success of your content strategy. It features top tips and advice from some of the top content marketers working in some of the biggest B2B and SaaS companies globally.

# How to plan your content

**SALES  
HACKER**

**Meenakshi (Meenz) Nautiyal** is the SEO Marketing Manager at **Sales Hacker, Inc.**, the world's largest online B2B sales community.

She has 9 years of experience in B2B and SaaS marketing, particularly in startup-phase companies. Her responsibilities at Sales Hacker include SEO and product marketing, content creation and website architecture.

For Meenz, successful content marketing starts with preparation and planning. *"Before you start creating your content, there are three things you need to do to get fully prepared,"* Meenz told us. *"They are: knowing who your audience is, aligning marketing with sales and building a content calendar."*

Meenz gave us good advice for each of these three stages:

## 1. Knowing your audience

*"To know your audience, you have to develop your **Ideal Customer Profile (ICP)**,"* said Meenz. *"Your ICP is a complete picture of your perfect buyer, including where they work, how they make decisions, and the kind of problems they're encountering daily. Once you know who your customer is, you can create content that is 100% targeted for them."*

Meenz had the following tips for building your ICP for content:

- ✓ **Interview your best customers** – they will have great insights to share about your product and how it's perceived in the wider industry. Use their knowledge to influence your content.
- ✓ **Focus on pain points** – get an understanding of the problems your customers are facing; your content should be providing solutions for them.
- ✓ **Listen to your sales team's cold calls** – you will learn what prospects in your industry are talking about, plus the language and terminology they use; feed this into your content.

## 2. Aligning marketing and sales

*"Just as important as knowing your customer is getting marketing and sales aligned around content,"* said Meenz. She shared some ideas for aligning these two departments:

- ✓ **Create a shared library of your content** – save the content you produce in one central location. Google Drive, OneDrive and Dropbox are popular file storage options. Make sure your content is easy to find and stored in clearly labelled folders.
- ✓ **Schedule weekly content meetings** – get your senior marketers and salespeople together in one room. Brainstorm content topics and formats.
- ✓ **Unify your goals** – have your sales and marketing leaders agree on shared content objectives. What does a successful content marketing strategy look like? Decide on the aims of your content and select the metrics you're going to track.



### 3. Building a content calendar

*"In my experience, it's always best to form an outline of your content before you start publishing it," said Meenz. "A content calendar will help you to plan out in detail the content you want, fully aligned to your business goals and important dates in your industry diary."*

Here are some content calendar pointers from Meenz:

- **Plan your content on a quarterly basis** - this gives you the space to innovate and be flexible. You don't want to plan things too far ahead.
- **Include important dates and industry events in your calendar** - take advantage of these happenings by scheduling relevant content around them.
- **Always mix things up!** Don't just plan out the standard blog posts. Add videos, webinars, case studies, whitepapers and podcasts to your content marketing slate.

#### Cognism's content calendar

Are you looking to get your content marketing off to a flying start in 2020? Then download our free content calendar today! We use it to plan out our content months in advance, helping us to build a content strategy that's fully aligned with our **B2B lead generation** goals.

Cognism's content calendar template will help you to:

- ✓ Map out every piece of content on a day-by-day basis and never miss a deadline!
  - ✓ Get an overview of where your content is being shared throughout the year.
  - ✓ Keep internal stakeholders in your business informed about the types of content you're producing.
  - ✓ Align your content marketing efforts to the wider goals of your business.
- ✓ Match your content to the keywords you want to target in 2020.
  - ✓ Quickly spot any gaps in your content, empowering you to innovate and get creative!
  - ✓ Build a central repository of your content, which can be shared with anyone in your team!

Download our **FREE** content calendar template [here](#)



Date	Content type	Content focus	Keywords		Channels		Status	
			Primary	Secondary	Blog	LinkedIn	Twitter	Facebook
1st Jan 2020								
2nd Jan 2020								
3rd Jan 2020								
4th Jan 2020								
5th Jan 2020								
6th Jan 2020								
7th Jan 2020								
8th Jan 2020								
9th Jan 2020								
10th Jan 2020								
11th Jan 2020								
12th Jan 2020								
13th Jan 2020								
14th Jan 2020								
15th Jan 2020								
16th Jan 2020								
17th Jan 2020								
18th Jan 2020								
19th Jan 2020								
20th Jan 2020								
21st Jan 2020								
22nd Jan 2020								
23rd Jan 2020								
24th Jan 2020								
25th Jan 2020								
26th Jan 2020								
27th Jan 2020								
28th Jan 2020								
29th Jan 2020								
30th Jan 2020								



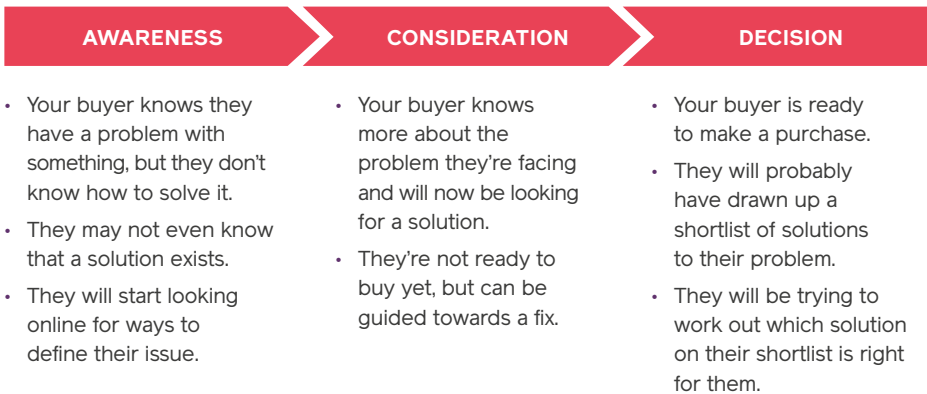
## Mapping your content to the buyer's journey

B2B content marketing is a great way to make buyers aware of your brand and product. It can help you with **B2B lead generation** and turning those leads into customers. However, that's only if you do it right.

It doesn't matter what form your content marketing takes, whether it's a whitepaper, blog template, podcast, video or anything else; it's about reaching your prospect with the right piece of content at the right time. For that, you need to look at your buyer's journey and make sure your content has it covered. Let's find out more.

### 1. What is the buyer's journey?

Your buyer's journey is the path that someone takes from knowing nothing at all about your product and how it can help them, to becoming a customer and later, a raving fan. There is no one standard buyer's journey, but you can generally split the buyer's journey up into three stages.



When analysing your buyer's journey, remember, it's not about you, it's about the buyer.

You may also find that different buyers go through different journeys with you, depending on their circumstances. This is why buyer personas are essential in B2B content marketing.

### 2. Why content mapping is important

By studying the buyer's journey for your customers, then mapping your content to it, you'll quickly see what content you should be offering, and when.

You'll be able to create compelling pieces of content for each stage of your buyer's journey, guiding your buyer from awareness, through consideration and decision, to becoming a happy customer. You will also be able to get in front of the right buyers at the right time, improving their experience with your company, generating more leads and ultimately increasing your sales!





3. How to get started

The first thing you should do is go through your company’s entire library of content and analyse where each piece sits on your buyer’s journey. When you audit your content in this way, you can quickly see where the holes that need filling are.

Next, it’s time to create content that helps your buyer at each stage of their journey with you.

Cognism is happy to provide a free template, which you can use right away! Save it and use it at your company, to help you map out your content for each of your buyer personas.

PERSONA NAME: .....

	AWARENESS	CONSIDERATION	DECISION
<div></div> <div>CONTENT TYPE</div> <div><ul style="list-style-type: none"><li>• Blog post</li><li>• Whitepaper</li><li>• Infographic</li><li>• Press release</li></ul></div>	<div><ul style="list-style-type: none"><li>• Whitepaper</li><li>• Webinar</li><li>• Video</li><li>• Case study</li></ul></div>	<div><ul style="list-style-type: none"><li>• One-pager</li><li>• Pricing slide</li><li>• Case study</li><li>• Product guide</li></ul></div>	
<div></div> <div>CONTENT THEME</div> <div><ul style="list-style-type: none"><li>• SDR skills list</li><li>• Cold calling how-to guide</li><li>• Lead prospecting FAQ</li><li>• Sales KPIs playbook</li></ul></div>	<div><ul style="list-style-type: none"><li>• Sales tech stack guide</li><li>• Sales Director interviews</li><li>• Data cheatsheet</li><li>• Customer review video</li></ul></div>	<div><ul style="list-style-type: none"><li>• Product explainer</li><li>• Product features checklist</li><li>• SMB customer testimonial</li><li>• Competitor comparison</li></ul></div>	
<div></div> <div>KEYWORDS</div> <div><ul style="list-style-type: none"><li>• B2B lead generation</li><li>• B2B prospecting</li><li>• Outbound sales software</li><li>• Outbound lead generation</li></ul></div>	<div><ul style="list-style-type: none"><li>• B2B data</li><li>• Revenue generation</li><li>• Sales intelligence</li><li>• Sales acceleration software</li></ul></div>	<div><ul style="list-style-type: none"><li>• ROI</li><li>• Revenue technology</li><li>• Growth</li><li>• Scaling</li></ul></div>	
<div>CONTENT TITLE</div> <div>.....</div>	<div>.....</div>	<div>.....</div>	
<div></div> <div>ACTIVATION CHANNEL</div> <div><ul style="list-style-type: none"><li>• Company website</li><li>• LinkedIn</li><li>• Twitter</li></ul></div>	<div><ul style="list-style-type: none"><li>• Landing page</li><li>• External publications</li><li>• Email newsletters</li></ul></div>	<div><ul style="list-style-type: none"><li>• Company website</li><li>• LinkedIn</li><li>• Personalised email</li></ul></div>	

# Keywords and SEO

Once you've planned your content and created it, it's time to publish! How can you get as many people as possible to view it? One way is search engine optimisation, or SEO. A quick definition of SEO is:

"SEO (Search Engine Optimization) is the practice of optimising content to be discovered through a search engine's organic search results."

From Ahrefs, What is SEO? [Search Engine Optimisation Explained](#)

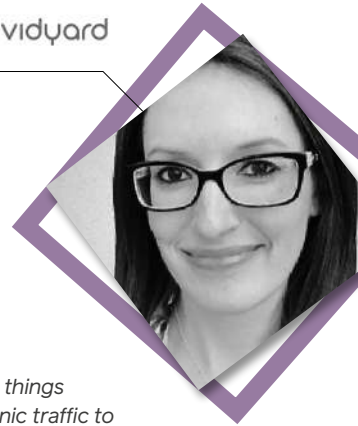
Your guide for this section is **Kendall Walters**, Content Marketing Manager at **Vidyard**, the online video platform for business.

Kendall is a highly-experienced inbound content marketer, editor and award-winning writer. During a varied career, she has worked for several global brands, nonprofit organisations, marketing agencies and news publications.

Kendall's primary responsibilities at Vidyard include managing the Vidyard blog, creating in-depth downloadable content and producing copy for landing pages, web pages, blogs posts and more. Who better to give advice on the popular topic of SEO?

*"Optimising blog content for search is one of the single most important things you can do to create an effective post - and channel - that drives organic traffic to your website," Kendall told us. "My top tip would be: think about keywords first!"*

Kendall supplied us with three great ideas for picking the right keywords and enhancing your blog for search.



## 1. Research your keywords

*"When I approach creating (or assigning) blog content, I always start with keyword research. Find out what questions people are asking around the topic you want to write about. Doing this is an incredibly powerful way to determine what information your piece needs to include in order to be valuable to your audience."*

*"It's also a great way to identify other possible topics you can write about. I use SEO tools to research the topic and related terms until I have a primary term and a nice bucket of latent semantic indexing (LSI) keywords to go with it."*



## 2. Research your competitors

*"Next, I conduct competitor research to see if they have published posts that are already ranking for the required topic. I look to see if there's anything they're missing."*

*"This allows me to identify if there are any opportunities for me to provide a more in-depth, well-researched, or well-written post. I also look at the content my organisation has already published on this topic (or related topics) so I can include relevant internal links. I use this information to build out the skeleton of my blog post."*

*"Often the keywords will provide you with some guidance on what sections the post needs to have."*



## 3. Optimise your blog

*"From there, I continue to research the topic as I write to ensure the piece is as well-informed and educational as possible. When it comes to editing, I like to pull up the keywords so I can guarantee they appear in the most important parts of the blog post (for me, these are the headline, the first 100 words and the subheaders)."*

*"Once reviewed, I move on to staging the post. This is where I include the primary keyword in the meta description, metadata for images and the URL."*

# How to amplify your content

Content needs an audience. Publishing engaging, persuasive content is not enough - you need it to reach people. For this, you need a strategy for content amplification that gets your content seen.

**Karla Rivershaw** is Head of Marketing at **Turtl**, the premium content creation software. Karla has a great deal of experience in marketing strategies that push content to the right people at the right time. She gave us her five top tips for content amplification.

**Turtl**



## 1. Know your audience

*"Before you start spending time on amplifying your content, you need to know where your ideal customers spend their time," Karla told us. "Once you have this information, you can start targeting them where they are."*

*"To begin, develop your Ideal Customer Profile or ICP. Your ICP is a comprehensive description of your perfect customer; the kind of customer that can find massive benefits from your product or service, while also being able to give you enough value in return to make your business profitable."*

Why is ICP important? When you build a detailed picture of your ideal customer, you can work out:

- What they enjoy doing.
- Where they spend their time.
- What media channels they consume.
- The types of content that they will respond best to.



## 2. Bring in influencers

The sad truth is: no-one cares what marketers think! Everyone knows the famous B2B sales quote, *"People buy from people."* The same is true in B2B marketing.

*"To make an impact with your content, you need to get someone to front it who your ideal customers know, like and trust," Karla said. "That way, when they see it, they will engage with it and act on it. What you need are influencers!"*

Karla gave us a definition of influencers and the best strategies for getting them to work with you:

*"Influencers are thought leaders that have a following of people who fit your ICP. A good place to start is to seek them out on LinkedIn and invite them to collaborate with*

*you on content. You'll find this is easier than it sounds - people who have achieved influencer status in their careers are unlikely to turn down the opportunity to reach even more people!"*

*"My advice is to interview influencers in your industry and turn your conversations into blog articles. Afterwards, leverage the power of influencer networks to promote your content - influencers typically bring huge audiences with them."*



### 3. Grow your networks

Karla had some useful tips to share for growing your business network. "As a content marketer, you should always be looking to grow your network and your own sphere of influence. Set yourself weekly or monthly targets to search for potential contributors and partners. LinkedIn is a great resource for people working in B2B."

Events are also important. "Attend events and meet as many people as you can," Karla advised. "When you take someone's business card, make sure you follow up. Once you have started a relationship, use it. Ask your partners to share your content. It's a free and easy way to achieve amplification."

Karla had a bonus tip for us - when you post content to social media, tag people you think might be interested in what you have shared. All it takes is for one influencer to see your work, then retweet it or share it - and you never know, it may go viral! Again, it's free and super easy.



### 4. Focus on quality

*"It sounds obvious, but the best way for content to find an audience is for it to be good!"* Karla told us. "Quality content is good for two reasons."

- **It's good for growing an audience organically** - if you frequently publish superior content, your readers will share it and your following will grow.
- **It's good for Google** - when you follow Google's guidelines around creating valuable content, your website will rank higher in their search engine results. That means more people will see it.

Unsure about what constitutes quality content? You'll find Google's own guidelines [here](#).



## 5. If it works, do more of it!

Karla's guidance is to measure everything related to your content. If you don't, how will you know if it's working or not?

*"At the start of your content amplification strategy, it's important to A/B test," Karla said. "Try out different methods, ideas and channels; you'll quickly see which ones are the most successful. Study your **B2B data** - Google Analytics is a great tool for website engagement data. If you use a social media scheduling tool, use its reporting function to get a clear picture of your most popular audiences, as well as the best days/times for you to post."*

*"Then, focus your energies on what works. Keep pumping out regular, quality content, aimed at your ideal customers and their pain points, on the channels where they spend their time - and you'll quickly find success!"*



**Juro**

## Using content to close deals

**Tom Bangay** is Director of Content at **Juro**, the end-to-end contract management platform. Tom has a wealth of experience in content management and production, and knows how B2B startups and scaleups can leverage the power of content to grow quickly.

Tom's advice about using content to close deals will help you think about content in a strategic way, using it to speed up the sales cycle and get your target prospects to sign on the dotted line!



### 1. Personalise your content

Personalisation is an extremely powerful facet of content marketing. Everyone likes to feel like they're being spoken to directly, after all. Personalising your content is one great way to build trust and get crucial buy-in from key stakeholders.

Personalising every bit of content, though? It sounds like a lot of work – but it doesn't have to be. Tom's top tip is not to create new personalised pieces every time. Instead, adapt the content you already have.

*"Let's say, for instance, you have a prospect who's really close to signing," Tom began. "Your sales team is desperate for a relevant case study that nails their exact use case – but there isn't one! In this scenario, don't think you have to create a new case study from scratch. Take a look at the ones you've already written. You might be able to rephrase a couple of lines to make it perfect for that specific prospect: specialised for an audience of one."*

*"It might not need a great deal of time and effort, either – changing a few words here and there might do it! Just make sure you're focused on the prospect's pain points and how your product can provide the perfect solution."*



### 2. Align marketing and sales

*"Content marketing is a long-term strategy," highlighted Tom. "For best results, you need to keep churning out content that's relevant at every stage of the sales funnel. This is where content marketing comes into its own. It helps to guide prospects through the funnel, nurturing and delighting them, until they eventually become customers."*

To make the most of this process, you need both marketing (the content creators) and sales (the deal-makers) singing from the same hymn sheet. Tom recommended setting up regular cross-team meetings to identify...

- The target accounts that your sales team are focusing their efforts on.
- The types of content that will be needed for each of those accounts.

If you're a salesperson who's got an account that's very close to closing – bring in your content creator! Maybe there's a content piece that will help you get the deal over the line. Startups and scaleups often target an incredibly narrow niche – if sales have become hyper-focused, content should too.



### 3. Choose your content wisely

In business as in life, everyone is different. Everyone responds to content in different ways. Some people love videos, for example, while others prefer good old-fashioned text-based content. So, you have to choose the types of content you produce wisely. How can you make informed decisions around content?

*"The first step is to go back to your buyer personas," said Tom. "What do they tell you about your target prospects? What kinds of content do they typically enjoy? Use the insights to prepare a content plan for each prospect."*

*"Bear in mind, though, that people will be looking to engage with different types of content throughout their buyer's journey with your brand. At the Awareness stage, short-form top-of-funnel content is best. Prospects might only have the appetite for long-form content when they reach the Decision stage. **LinkedIn Marketing Labs** has identified that, on average, buyers consume 10 pieces of content before making a purchasing decision."*



### 4. Pick the right channels

Just as important as knowing the types of content that resonate with your buyers is knowing which channels to reach them on. *"Again, your buyer personas will tell you which platforms your prospects are primarily using,"* Tom told us.

*"Another good source of information is your sales team. Ask your salespeople where their conversations are happening. Are your prospects engaging with sales over social media (LinkedIn, Twitter etc.) or on email?"*

*"Don't forget the power of direct mail in this regard. Handwritten letters and physical gifts can be very successful drivers of engagement, especially in this digitally-saturated age. Sending a prospect a hard-copy book you wrote establishes a permanent physical reminder of your value proposition and ensures that your brand stays on their desk."*

Define the best place to engage with your target accounts – and then double down on it. If you have one paid content channel that beats the rest consistently, ditch all the others and increase your cadence on the winning channel. Keep pumping out relevant content in the right place and you'll be in a much better position to steer your prospect towards closing.



## 5. Establish your brand as an authority

This is perhaps the hardest part of the content marketing puzzle. Marketing Donut has highlighted that only **2% of sales are closed on the first meeting**; the other 98% will buy only once a certain level of trust has been built up.

To get higher close rates, you need to build up trust around your brand. Content marketing is your path to getting there. Tom showed us how.

*"Bring in experts to front your content. Find influencers and thought leaders in your industry, people who other people respect and listen to. Connect with them and set up as many interviews with them as you can."*

*"This isn't as difficult as it sounds. Someone who's achieved influencer status in their career is unlikely to reject a request to influence even more people. There are people keen for the spotlight in every industry vertical. Use their interviews as the basis for your content."*

Tom identified three benefits to using contributors in this way:

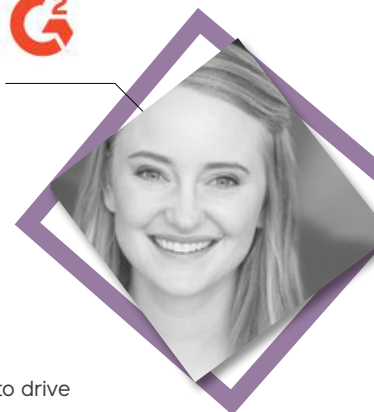
- **It gives you regular, relevant content to publish** - and it doesn't cost you anything to produce!
- **It helps to quickly build brand awareness** - influencers bring their own audiences with them.
- **It will build that all-important trust around your company** - which means that prospects will be much more likely to close deals with you.

# Repurposing content

Content marketing isn't always about creating something new - it's about being clever and resourceful with what you've created already. For this section, we called on the expertise of **Kristen McCabe**. Kristen has worked in marketing on two separate continents, from being a Marketing and Events Coordinator for the **Australian Association of National Advertisers** to her work as a Content Marketing Manager for **G2** in the USA. Currently, Kristen is a consultant offering businesses guidance in digital marketing and branding, and teaches content marketing at the **General Assembly** in Chicago.

Kristen's approach to marketing involves using data-driven insights to drive creative thinking. She is passionate about building authentic marketing messages and campaigns that resonate with people. Kristen's specialties in marketing include copywriting, SEO, video and events.

We asked Kristen for her thoughts on repurposing content and she gave us three core areas to focus on.



## 1. Video

*"Video is a really powerful tool for storytelling and making a connection with your audience," Kristen said. "But don't think you have to make videos totally from scratch. If you've been publishing content for a while, then you've already built up a library of blog posts, infographics and case studies. You can use the content you already have as the basis for your videos."*

*"Look at the analytics for your blog. Which posts are the most popular with your audience? Once you find that out, you can take those blogs and create videos out of them. If you have a blog with, say, four sections, then that's four videos! That gives you a series of videos you can promote on social media over weeks or months."*

*"Include video as a separate section on your content calendar. Build out a strategy for video production and promotion. Every month, identify your top-performing blogs and block out some space on your calendar for videos."*

When it comes to video, budget is a traditional concern for B2B marketers. "Video can be expensive, but it doesn't have to be," Kristen told us. "Nowadays, everyone has decent HD cameras on their smartphones! There are free tools available as well. I've used **Lumen5**, which lets you create professional-looking videos in minutes. All you need to do is copy and paste your blog post, select your images and music, and it will create the video for you. It's a great option for companies with limited marketing budgets."

If you're looking to create videos of yourself, co-workers, or customers, Kristen suggests learning a few essentials. "Take the time to research the basics when it comes to lighting and sound. You can chat to the camera and give an amazing delivery, but if

*the technical element falls short, so does the professionalism of your video. And, when you really want to bump things up a level, the film production community is full of amazing freelancers ready to help!"*



## 2. Quora

*"Quora has been a really successful channel for me," Kristen said. "It's an online Q&A forum, where users can ask questions and get replies from anyone. I've found it to be very effective because the people who post on Quora are looking for answers; they're looking for insights and knowledge-sharing. That's perfect for content marketing!"*

*"I search for questions that are relevant to my business and industry. You can use a keyword search to find them. Questions with lots of upvotes and answers are the best ones to get involved with - these are the threads that the most amount of people are looking at. Then, I contribute to the discussion, writing a short-form answer and including a link to the long-form blog at the end."*

*"Getting involved on Quora like this is a great way of repurposing your content. It helps to position you and your brand as thought leaders to be trusted. It also helps to drive more traffic to your website. Another benefit is that it shows you what topics people in your industry are interested in. This can give you inspiration for future blog posts, videos etc."*



## 3. Podcasts and webinars

*"Podcasts and webinars have never been more popular," said Kristen. "They're only going to grow as a marketing channel in the next few years. Again, they're a good means of repurposing content. Take your most popular blogs and turn them into podcasts. If there are topics your audience is particularly interested in, setup some webinars based around those topics."*

Kristen emphasised the value of outside contributors. *"In content marketing, one of the most powerful things you can do is get some external contributors to be a guest star in your podcasts and webinars," she advised. "Reach out to thought leaders in your industry. Ask them if they'd like to be interviewed for your podcast. Influencers bring with them their own audience of followers, which is a great thing for engagement!"*

Much like video, Kristen believed that lack of budget shouldn't be a deterrence for setting up podcasts and webinars. *"There are free tools and platforms out there," she said. "If you don't know where to start, I can recommend the **G2 website**. It's a great resource for finding the right software for your business!"*

## Measuring the success of content marketing

Creating content and sharing it are just the first steps in your content marketing strategy. To achieve your goals with content marketing, it's essential to measure and track everything you do. Then, use your findings to optimise and improve your content marketing in the future.

Whenever and wherever you publish a piece of content, you create **B2B data**. This data can be monitored and used to improve your content marketing game.

We sat down with **Emily Byford**. Emily is the Content Marketing Manager at **SaaStock**, a global community of software as a service (SaaS) founders, executives, and investors. Cognism was an exhibitor at the SaaStock 2019 flagship event in Dublin.

Emily shared her insights into measuring B2B content marketing success in three main areas. But before you can measure, you need to know what you are measuring for.

**SaaStock**



### Set your content marketing goals

*"Before you start publishing content, think about what you want to achieve," Emily said. "If you don't know what your goals are, how will you know if you're being successful?"*

Emily's ideas for goals were improving numbers around:

- ✓ **B2B lead generation** - names at the start of your sales funnel.
- ✓ **Brand awareness** - making people more aware of who your company is and what you do.
- ✓ **Engagement** - views, dwell time and shares for your content.
- ✓ **Lead nurturing** - moving leads along your sales funnel.
- ✓ **Sales** - turning leads into customers.
- ✓ **Customer retention** - getting existing customers to buy from you again.
- ✓ **Subscription growth** - adding numbers to your subscription service.

Once you've set your goals, it's time to decide which metrics to track.

Emily showed us the metrics that matter across the three main content marketing channels.



## 1. Search engines

*"Many of your potential buyers will find your content through search engines such as Google," Emily confirmed. "You need to make your content as easy to find as possible, driving more traffic to your website. How do you go about doing this? By improving your SEO skills!"*

*"The goal of good SEO is to get your content to rank as highly as possible on search engine results for your chosen keywords. Google is clever enough that if you work out your keywords and write content that provides value to the reader, it will reward your content with a high ranking."*

*"Be careful, though! Don't overstuff your content with keywords. It's bad for the reader and bad for your ranking. Google's algorithm will spot what you're up to and penalise you by pushing your website down the list, making it harder for people to find."*

Here are the three search engine metrics you need to track for your content marketing:

IMPRESSIONS	CLICKS	SITE VISITORS
The number of times your content was shown on Search Engine Results Pages (SERPS).	The number of times users chose to visit your content after seeing it show up in search results.	The number of users that came to your site. They could be new users, reading your content for the first time, or returning users who are loyal to your content.



## 2. Your website

*"Once a visitor is on your website and engaging with your content, there are several opportunities to measure success," Emily continued.*

Here are the three website metrics Emily recommends that you track:

UNIQUE PAGE VIEWS	PAGES PER VISIT	BOUNCE RATE
The number of times a page on your site has been visited by a user, excluding repeat visits.	<p>The average number of pages on your site a user visits when they come to your site.</p> <p>This is calculated by dividing total page views by the number of visitors.</p>	The proportion of users that leave your site after viewing only one page, expressed as a percentage.





### 3. Social media

*"Social media is where you promote your content," Emily explained. "It's also where readers who find value in your content may choose to share it with others. Of course, there are metrics you can track to evaluate your success here too."*

Emily gave us these important metrics to track:

REACH	ENGAGEMENT	AUDIENCE GROWTH RATE
The total number of social media profiles that see your content.	The number of interactions your content receives.  This can differ by social media platform. For example, on Facebook, you can receive likes, shares and new followers.	The change in your company's number of followers across all social media platforms.

**Emily had one last bonus tip for us:**

*"The one thing you need to track across all your channels is your conversion rate. Your conversion rate is the percentage of users who view your content, then go on to do what you want them to do. For example, if the goal of a piece of content is to drive subscribers to your newsletter, your conversion rate is the percentage of people who, after reading your content, click 'subscribe'."*

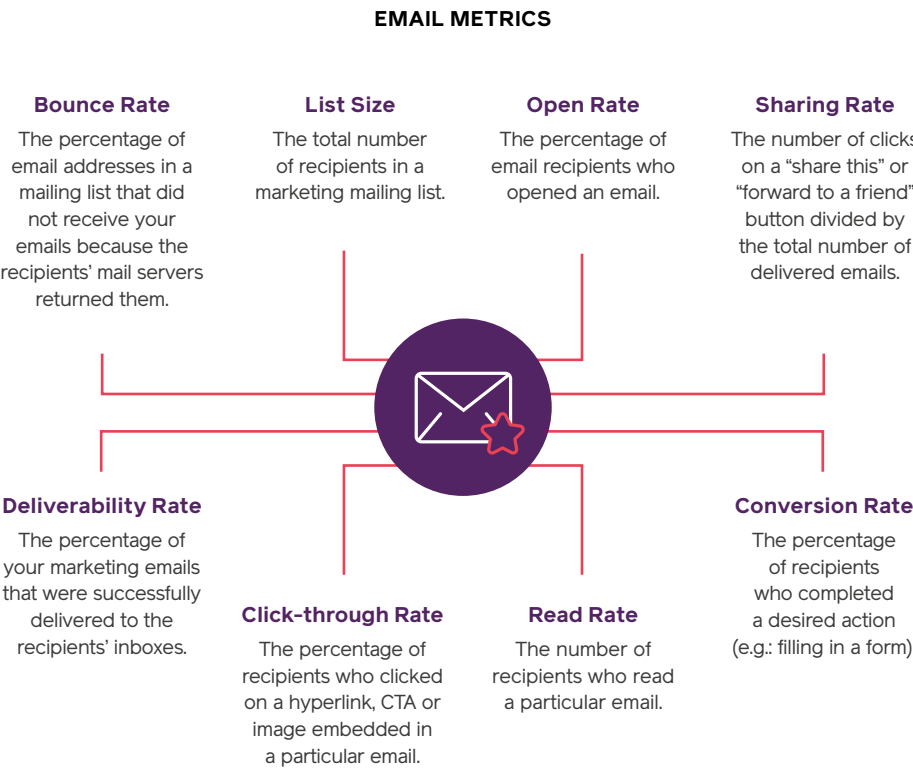
*"In this example, you would track conversions by setting up unique codes in the links inside your content, which tell your CRM where each subscription comes from."*

# The must-track B2B marketing metrics for demand generation

B2B marketing is evolving from an art to a science. There are many advanced reporting tools now available, including free platforms such as Google Analytics. Marketers are able to measure their performance as never before.

But which metrics do you really need to track for B2B demand generation? Marketing is, after all, a very broad church, involving lots of interconnected disciplines and functions.

Cognism's Head of Marketing, **Alice de Courcy**, has given us a list of the B2B marketing KPIs which really matter to her. We've put them into a useful infographic for all marketers to use. Measure them regularly and use the insights you'll gain to optimise and accelerate your B2B marketing activity.



## SOCIAL METRICS



### Retweets and Shares

The number of retweets and shares a specific social post gets.



### Followers

How many followers your company has on a particular social media channel.



### Post Volume

How many social posts your company makes during a specific time frame.



### Likes and Favourites

The number of likes and favourites a specific social post gets.

### Lead Number

The number of leads generated through social media activity.



### Follower Growth Rate

The number of new followers you gain on a social media platform during a specific time frame.

### Engagement Rate

The number of engagements on a piece of content (likes, shares, comments) divided by the number of followers.



### Referral Rate

The percentage of your website visitors who are coming to your site from social media.

## PAID SEARCH METRICS



### Impressions

The number of times your ad is shown on a search engine results page.



### Ad Position

The position of your ad on a search engine results page in relation to other ads.



### Cost per Impression

The total number of impressions per ad divided by 1,000.



### Click Rate

The total number of times your ad is clicked on.



### Lead Rate

The number of leads each ad generates.



### Cost Per Lead

The total cost of your ad campaign divided by the number of generated leads.



### Cost Per Click

The total cost of your ad campaign divided by the number of clicks.



### Closed Deal Rate

How many deals were closed from a paid ad campaign.

WEBSITE AND CONTENT METRICS

Form Submissions

The total number of times a form was completed on a webpage.

Content Shares

The number of times your content is shared during a specific time period.

Unique Page Views

The number of times a specific webpage was viewed at least once.

Conversion Rate

The number of unique visitors to a website who turned into customers divided by the total number of unique visitors.

Content ROI

The total amount of revenue generated from each piece of content divided by the costs of producing the content.

Content Downloads

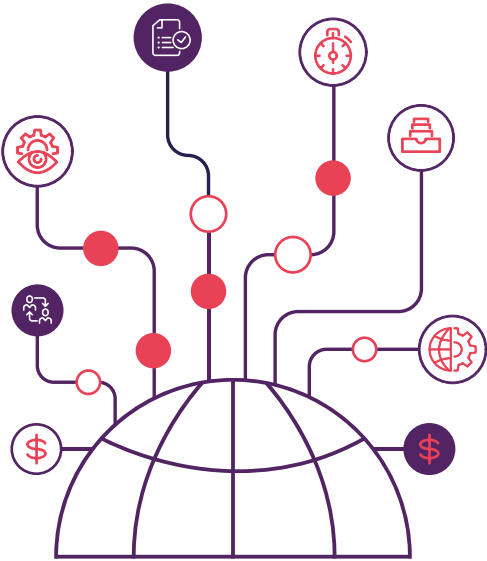
The number of times a piece of gated content was downloaded.

Leads Generated

The number of leads generated from website or content activity.

Website ROI

The total amount of revenue generated from website activity divided by the investment costs of running your website.



CHANNEL PERFORMANCE METRICS

Leads by Channel

The number of leads generated from a specific marketing channel.



Closed-Won Deals by Channel

The number of closed-won deals generated from a specific marketing channel.

# Four strategies for B2B sales and marketing alignment

Over the course of this guide, we've talked a lot about aligning marketing and sales. And with good reason - it's a foundation principle of B2B demand generation.

**Michael Levy** is the Principal at **GZ Consulting**, the B2B industry's leading sales and market intelligence consultancy. He has pinpointed four winning strategies for sales and marketing alignment.



## 1. Account-based marketing (ABM)

In recent years, account-based marketing (ABM) has risen to the top of the B2B marketer's toolkit for demand generation. ABM identifies the top customers and prospects based upon an Ideal Customer Profile (ICP). While an ICP can be defined as a set of firmographic selects (e.g. size, geography, industry codes, installed technology), this approach only makes sense when launching a company or product.

Once a firm has established itself, the ICP should be based upon a company's own data (e.g. wins, losses, renewals, upgrades, churn). By combining company data with a reference **B2B data set**, a better targeted ICP can be defined. This customer base can then be expanded to identify similar companies.

Sales and marketing organisations can then identify a common set of company properties (firmographics, technographics, business signals, sales triggers) to expand their universe of high-priority prospects and customers.

### The importance of demand units

The ICP provides a top company and prospects list for the organisation. Sales should be targeting demand units (buying committees) consisting of purchasing, technical decision-makers, economic decision-makers, and influencers.

Targeting one or two people at a firm or blanketing an organisation with marketing are both inefficient. If the rep only sells to end-users or technical decision-makers, he or she misses most of the demand unit members.

ABM, with its focus on demand units at top customers and prospects, supports targeted messaging across the full set of decision-makers and influencers. Furthermore, focusing on a smaller set of companies in distinct verticals allows for the development of narrowly defined messaging and content based upon demand unit personas.



## 2. The Chief Revenue Officer (CRO)

Software-as-a-Service (SaaS) subscription models place a greater emphasis on customer satisfaction and coordination between functions. In this environment, maintaining distinct sales, marketing, and support departments under separate management makes less sense. Instead, greater coordination and alignment between the functions are required to grow revenues and reduce churn.

So, firms have started to create a Chief Revenue Officer role, which oversees sales, marketing, and customer success teams. The CRO is responsible for managing the customer journey and defining metrics and processes which support the customer and grow the top line.



## 3. B2B Data-as-a-Service (DaaS)

Sales and marketing were a bit slow to recognise the value of B2B DaaS as it lacked the “shiny new object” appeal of other demand generation solutions. But there are many benefits to it.

B2B DaaS supports many corporate processes including:

- Digital marketing landing pages (improved web forms).
- Duplicate record management.
- Lead enrichment.
- Customer segmentation and reporting.
- Audience targeting.
- Lead scoring and routing.
- Researching accounts, contacts and leads within CRMs.
- **B2B prospecting** based upon persona (function, level, location).
- AI initiatives.

### How B2B DaaS works

B2B DaaS prefills CRM and MAP records during customer, sales, and service data entry. It then maintains data quality, increasing sales rep confidence in CRM intelligence and improving AI-based recommendations. B2B DaaS reduces wasted time keying in company and contact information and provides standardised intelligence such as industry codes, job functions, and sizing data.

### The benefits of B2B DaaS for sales and marketing

Not only are enriched records more reliable, but sales reps can focus on activities where they excel and take joy – interacting with customers and prospects. Because account and contact intelligence are prefilled and automatically maintained, reps can focus on account planning, messaging, and reaching out to the broader demand unit.

Thus, sales reps are more effective and efficient. Likewise, marketers benefit from improved **B2B lead generation**, webform prefills, better lead management decision-making, improved segmentation, and better audience building and messaging.



## 4. Sales Engagement Platforms (SEPs)

The last alignment driver is the rise of Sales Engagement Platforms (SEPs), which support a strategic approach to sales messaging and account prioritisation.

Five years ago, there was a clear handoff between B2B sales and B2B marketing. Once a lead was deemed marketing qualified, it was sent to sales which often ignored the lead. Instead, leads were often generated by sales reps. Now that leads are better targeted due to ABM and data enrichment before being passed to sales, reps can immediately kick off a cadence of messages from the SEP.

Once a better-qualified lead is passed to sales, they can perform a “double-tap” by placing a cold call and emailing a contact on the first day. What’s more, the sales emails and subsequent steps are pre-planned and A/B tested by sales operations and marketing to ensure that messaging is optimised.

### Dynamic lead prioritisation

SEPs support dynamic lead prioritisation so that reps can focus on the next best activity throughout the day. Much of the non-customer interfacing overhead in sales (populating CRMs, prioritising tasks, setting follow-up tasks and documenting call disposition) is automated by B2B DaaS and SEP vendors.

### Improving sales productivity

While this automated engagement sounds like sales decision-making has been removed, this is far from the case. Sales reps decide which outbound cadences to employ, which products and services to pitch, and how to personalise each message. When much of the administrative overhead is removed, sales reps can focus on building authentic one-to-one messages with each member of the demand unit.

### Improving personalisation

Unlike marketing automation which sends general messages to prospects, sales reps can use SEPs to review and customise emails before sending them. This provides an opportunity to personalise each message by vertical, function, or previous discussions. In this case, automation supports more authentic relationships between buyers and sellers by allowing reps to focus on messaging.

### The benefits of SEPs

With SEPs, sales reps can be confident that:

- They are focusing on decision-makers at ABM prospects.
- Their time is allocated to the next best activity.
- Their messages are tested for efficacy.
- Follow-up tasks are scheduled even though they are not stopping to consider their next steps.



### **How the four trends drive better alignment**

The four trends (ABM, CRO, B2B DaaS, and SEP) all promote sales and marketing alignment in the following ways:

- They are all focused on closer relationships with top prospects.
- They provide improved information and messaging at every stage in the buyer's journey.
- They promote customer insights and a focus on demand units.
- They synchronise activities across the two revenue functions.
- They rely on a common reference data set that is continuously maintained across sales and marketing platforms.
- They drive a common set of defined metrics and definitions, such as lead scoring models, ideal customer profiles, and buyer personas.

## A blueprint for demand generation success

Building a demand generation engine that is repeatable and predictable is hard work. It requires just the right balance of long-term strategies, such as SEO plays, in combination with shorter-term strategies which can drive quick-win demand and feed a hungry sales team with aggressive growth targets.

Start building your content and SEO strategies from Day 1, as these lay the foundations for scalable and efficient growth. At the same time, build out a stream of paid advertising tests to run. Don't get put off by a need to spend large budgets to gain insights which are seen to have statistical significance - you can learn a lot on as little as \$500.00!

Wherever you can, build networks. Leverage partners, affiliates and thought leaders to bring authority and new audiences to your efforts. And a final thought - don't overlook more traditional marketing demand generation methods such as webinars and whitepapers. If you do anything differently, let it be that you build them on the validation of an MVP first. This is our blueprint to demand generation success.

## Contact Cognism today

Cognism is the perfect tool for demand generation. Find your ideal B2B customers, automate your email marketing campaigns and build a scalable, repeatable foundation for revenue growth.

Want more information about the world's best all-in-one globally compliant prospecting solution? We'd love to show you all the benefits we can offer over a quick, 15-minute demo. Click the link below to register your interest!



**Request your demo now**

Cognism 

# **B2B OUTBOUND:**

Building predictable growth

## Contents

Outbound sales: your route to predictable growth	40
How to build a high-performing B2B outbound team	41
Top 5 SDR skills	51
10 questions to ask when hiring an SDR	53
How to ramp up an SDR in 3 days	58
Generating leads for B2B outbound	61
The two major types of B2B outbound activity	64
Top cold calling tips	65
B2B outbound email	76
5 examples of successful outbound emails	79
B2B outbound cadences: combining cold calling and emails	84
2 examples of successful B2B outbound cadences	87
Perfecting B2B outbound: top tips from 3 top SDRs	111
The science of B2B outbound	118

# Outbound sales: your route to predictable growth

## Anyone can start a business.

In the UK alone, **660,000 new businesses** are registered every year. But of those 660,000 companies, 60% of them will fail within three years. 20% of them will collapse in their first 12 months of trading. That leaves only 20% who will really go the distance.

So yes, anyone can start a business – but the real trick is growing it and making it successful.

Why do so many new businesses go under? It can be for any number of reasons, but for a lot of them, it may have been that they didn't develop an effective outbound sales system. Outbound sales is the surest route for building predictable growth, particularly in the B2B sector, where competition is fierce and startup growth targets are aggressive.

## What is B2B outbound?

B2B outbound is the process of engaging with buyers and decision-makers inside a company to generate interest in a product or service and, hopefully, make a sale. The telephone is the main driver of B2B outbound, through an activity known as “cold calling”.

Other techniques can be used as well, including email and social media platforms such as LinkedIn; the combination of all these methods at once is known as a “cadence”.

B2B outbound is a proactive approach which requires identifying the key contacts in your target companies, going out into the market and selling to them.

## The difference between B2B and B2C outbound

B2B outbound is not like selling to ordinary consumers. When you sell to consumers, you usually only have to convince one person on the merits of your product. When you sell to businesses, you often need to win over a group of people, sometimes entire departments. That's why B2B outbound often takes a long time and comes with a multitude of challenges that need to be addressed.

## Who conducts B2B outbound?

B2B outbound is conducted by salespeople. Depending on the size of the company, they can be working alone or more usually in teams.

## What skills does B2B outbound require?

We'll cover this question in more detail later, but generally, B2B outbound demands salespeople who possess motivation, persistence and resilience. This is due to the length of the B2B outbound sales cycle and the number of stakeholders who are involved in any one deal.

## Why is B2B outbound important?

Beyond the baseline objective of growing your customer base and revenue, B2B outbound delivers two important benefits to a business:

- **It builds trust around your product or service** - remember that people buy from people. B2B outbound is a process designed for human interaction - salespeople contacting and engaging with prospects.
- **It provides a predictable growth model** - with B2B outbound, you can create a sales framework that is scalable and repeatable, empowering you to grow your business quickly and efficiently.

### Your guide to B2B outbound

At Cognism, we are masters of outbound sales, using it to help our company grow from \$2.5 million to \$7 million in ARR in 2019. In 2018, we grew our revenue by 250%. Now, we're going to open our vault and share our secrets with you!

Over the course of this exhaustive guide, you'll learn:

- How to build a B2B outbound sales team, geared for high-performance.
- What the must-track B2B outbound metrics are.
- How to create a team culture that supports your outbound growth engine.
- Cold calling hints, tips and tricks from Cognism's high-flying B2B sales team.
- How to put together the perfect cadences for B2B outbound.
- World-class advice and guidance from the B2B sales frontline.

This is ***B2B outbound: Building predictable growth***.

## How to build a high-performing B2B outbound team

Successful B2B outbound all starts with one thing: people. Human beings are the drivers of B2B outbound. As we've identified, cold calling is central to an effective outbound strategy. You need people to conduct cold calling - people to lift up the receivers, dial the numbers, and persuade the prospects on the end of the line.

However, you can't just hire anyone, stick them in front of a desk with a phone and a laptop and hope for the best. You have to think strategically and scientifically if you want to build a high-performing B2B outbound team. Think of B2B outbound as an engine; an engine needs people, qualified people, to steer and maintain it.

In this section, we're going to show you how to structure a B2B outbound team and hire the right individuals to fill that team. Plus, you're going to get top tips and advice from business leaders working in some of the world's hottest B2B SaaS companies. Let's get started!



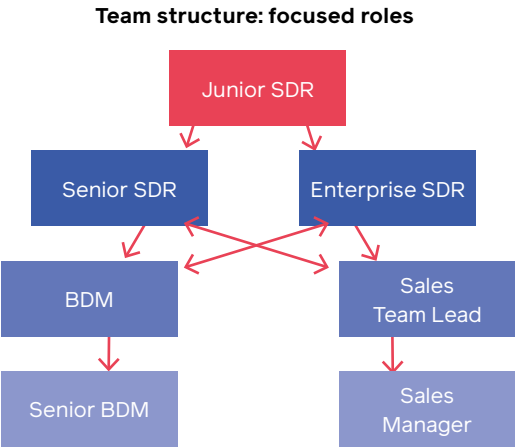
# 1. Structuring your B2B outbound team

Cognism's sales team structure is a good model for B2B startups to follow. The team is split into two "pods", based around clearly delineated roles:

SALES DEVELOPMENT REPRESENTATIVES (SDRS)	BUSINESS DEVELOPMENT MANAGERS (BDMS)
Responsible for creating opportunities and booking meetings.	Responsible for closing deals and generating revenue for the business.
Key Tasks: <ul style="list-style-type: none"><li>• Cold calling</li><li>• Outbound email</li><li>• Qualifying prospects</li><li>• Booking demos</li></ul>	Key Tasks: <ul style="list-style-type: none"><li>• Conducting demos</li><li>• Negotiating deals</li><li>• Drafting contracts</li><li>• Closing business</li></ul>

We also segment the roles further by the size of companies we wish to target - so that there are two separate streams, for SMBs and enterprise.

The overall team structure looks like this:



What are the benefits of adopting this model?

- It allows the employee to focus solely on just one responsibility, meaning that they quickly become experts in their roles.
- It creates a roadmap for progression: if an SDR consistently hits their targets, they become eligible for promotion to a BDM.



*“Core outputs need to be owned by one focused role. With this process, you'll find that your team quickly become experts in their fields.”*

– Nazma Qurban, Chief Revenue Officer, Cognism

Cognism 

## 2. Important B2B outbound metrics

Your outbound team can't be flying blind; there must be metrics underpinning and informing everything they do. During this section, we'll be covering high-level and individual outbound metrics and KPIs.

### Team metrics: the capacity model for B2B outbound

At Cognism, we adhere to the capacity model for B2B outbound. It works like this:

If in one month your revenue target is \$32k and your average deal size is \$1k, then you need 32 closed-won deals.

Based on a 25% conversion rate, you then need to create 97 opportunities in that month.

So, in order to hit your \$32k target, you need to have 7.5 SDRs working on outbound sales activity (cold calling, email outreach etc.).

Essentially, it's engineering your outbound team in reverse. It's starting off with your ultimate goal (the revenue you want to create) and then working backwards scientifically, to the point where you can calculate the number of sales reps required to hit that target.

It's a good model to follow because it's predictable and it allows you to manage your resources on a month-by-month basis. Here is an example of capacity in modelling in action, from Cognism's own data (January-June 2018):



	Revenue target	SDR Target P/W	Monthly Mgt's	Marketing meetings	Total Meetings	Meetings Attended	Mtgs >> Opp	Opps Created	Won conversion	Deals won	Number of AE's	Meetings Per AE Per Week	Meetings Per AE Per Month	SDR Ratio BDM
January	£32,000.00	7.5	45	180	54	234	175.5	97	25%	32	5	12	47	0.63
February	£36,000.00	11.6	70	233	116	349	262	144	25%	36	6	14.75	59	0.79
March	£44,000.00	14.2	85	284	142	427	320	176	25%	44	7	15.25	61	0.93
April	£44,000.00	14.2	85	284	142	427	320	176	25%	44	7	15.25	61	0.93
May	£44,000.00	14.2	85	284	142	427	320	176	25%	44	7	15.25	61	0.93
June	£48,000.00	15.5	93	310	155	465	349	192	25%	48	8	14.75	59	1.05



*"If you know what your inputs are and you measure them consistently, you will get consistent outputs."*

**– Neil Ryland, Chief Revenue Officer, Peakon**



*"If your revenue target is a certain amount, understand exactly how many deals you need, what the average deal value is and how many opportunities you need to convert. That feeds into the capacity which is: how many SDRs you're going to need."*

**– Nazma Qurban, Chief Revenue Officer, Cognism**



*"Ask yourself what success looks like. If you have to secure 40 meetings in a month, how many cold calls do you have to make to book those meetings? How much time do you have to spend on LinkedIn or anywhere else looking for prospects? How many emails do you need to send per day to hit those numbers?"*

**– Nigel Dunand, Director at Sandler Training**



### Individual metrics or KPIs

As well as high-level team metrics, it's vital to track individual metrics, or Key Performance Indicators (KPIs). They're the only way that you can measure how well your outbound team is performing. Tracking sales KPIs is particularly important if you work in the B2B SaaS sector, where deals are signed and revenue is calculated on an ongoing, monthly basis.

Both halves of Cognism's outbound team are tracked using different sets of KPIs. These are the KPIs for our SDR and BDM teams:

## SDR KPIs

These are the KPIs tracked by Cognism's Sales Development Representative (SDR) team.

### PRODUCTIVITY



#### Emails sent

The number of emails an SDR sends during a specific time period.



#### Calls made

The number of phone calls an SDR makes during a specific time period.



#### LinkedIn activity

How many LinkedIn InMail and connection requests an SDR sends and receives during a specific time period.

### SUCCESS RATES

#### Meetings booked

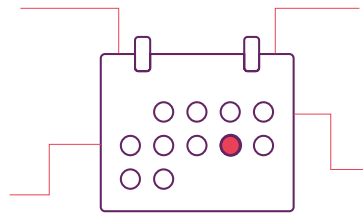
How many meetings an SDR successfully books in the calendar during a specific time period.

#### Meetings attended

The number of meetings booked by the SDR where the lead shows up.

#### Booked to attended ratio

The number of meetings booked vs. the number of meetings attended.



#### Meetings booked based on lead source

Whether the lead was sourced via inbound or outbound methods.

## BDM KPIs

These are the KPIs tracked by Cognism's Business Development Management (BDM) team.

### BDM METRICS



#### Average deal value

The average dollar amount of each BDM's deals.



#### Demo attended to opp won rate

The number of demos attended vs. the number of opportunities won.

MONTHLY RECURRING REVENUE (MRR)



Amount

The amount of MRR booked by each BDM, in dollars.



Target

The MRR target for each BDM in dollars.



% of target

The percentage amount of MRR won by each BDM vs. their target.

DEMOS

Number of demos booked

The total number of demos booked by SDRs for each BDM.



Number of demos attended

The total number of demos attended for each BDM.

INBOUND VS. OUTBOUND

Inbound conversion rate

The percentage of leads converted from inbound.

Inbound won

The total number of deals won from inbound.

Inbound revenue won

The total amount of revenue generated from inbound, in dollars.



Outbound conversion rate

The percentage of leads converted from outbound.

Outbound won

The total number of deals won from outbound.

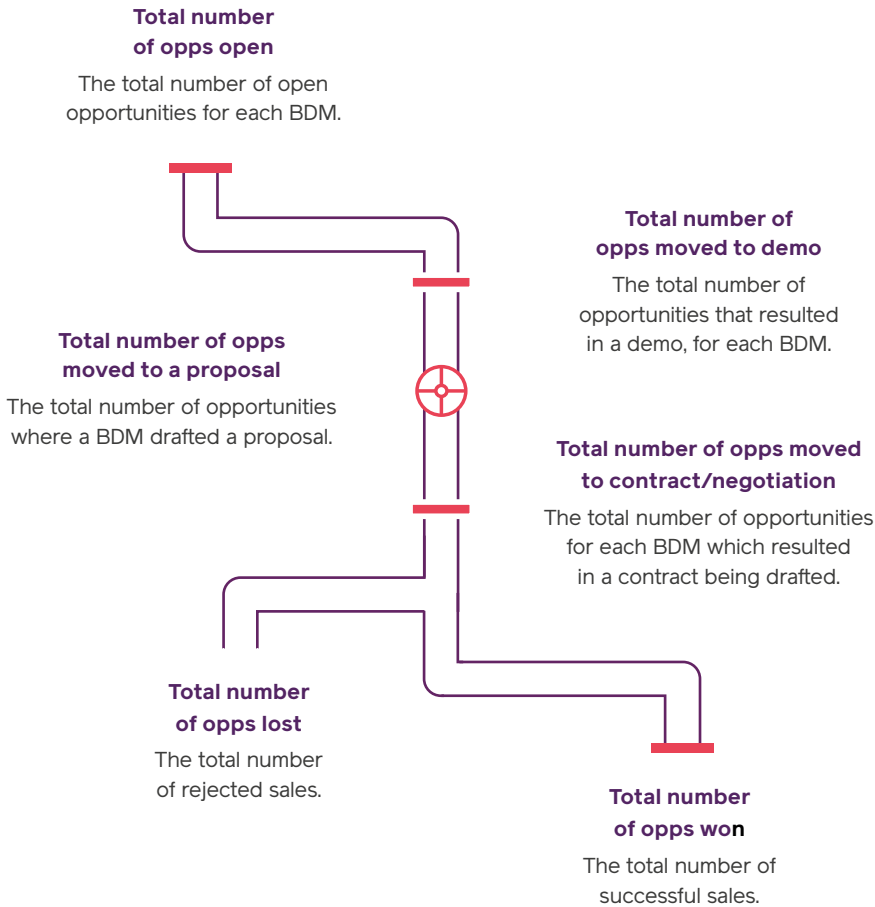
Outbound revenue won

The total amount of revenue generated from outbound, in dollars.

Total revenue won

The total amount of revenue generated from both inbound and outbound.

PIPELINE



## Setting benchmarks

How do you set benchmarks for your B2B outbound team? One idea put forward by **Collin Waldrip**, Sales Development Manager at **SalesLoft**, is to take the top three or five performers in your team. Study their performance (e.g.: calls made and account conversion rates) and work out what the averages are for each KPI.

Then, communicate those averages to the wider team as the “benchmarks” that every SDR or BDM should be aiming for.



*“Take your top three or five performers. Get their average metrics for the last month or quarter. On average, how many calls did they make every day, how many emails, how many LinkedIn touches? Then make those averages the foundation benchmarks for the rest of the team.”*

– **Collin Waldrip, Sales Development Manager, SalesLoft**



*“Review your data on a weekly basis. Don’t wait until the end of the month or the end of the quarter. Doing this will help you ensure your metrics are being met.”*

– **Nazma Qurban, Chief Revenue Officer, Cognism**



## 3. Creating a culture that supports your team

No matter the structures or processes you put in place; in the end, a successful B2B outbound operation all comes down to the people. Issues of hiring, retention, incentives and progression are critical. If you want to create a scalable outbound sales team, you have to hire highly-motivated people and build a supportive culture around them.

We’ll be dealing with this all-important concept of culture throughout this section.

### Hiring

How can you find those highly-motivated individuals who will motor your outbound sales? The SDR role requires singular people with very particular qualities.

In B2B outbound, these are the type of people you want to hire as SDRs:

- They must be **resilient** and capable of dealing with rejection every day.
- They must be **overachievers** - in their personal lives, if not their careers.
- They must be **enthusiastic** about a career in sales and developing their skills.
- They must be **creative and tech-savvy** - able to communicate in-person and by phone, email and video.



*"You need to take a step back and understand what are the must-have characteristics for a career in sales."*

– **Collin Waldrip, Sales Development Manager, SalesLoft**



*"I always want somebody who wants to progress and learn in sales specifically. The individuals who perform really well in an SDR role are those who are very focused on developing their sales skills."*

– **Nazma Qurban, Chief Revenue Officer, Cognism**



*"A good SDR must be articulate. You need product knowledge and also the verbal skills to communicate that knowledge to others."*

– **Karen Muldoon, Sales Leader, Zendesk**



## Top 5 SDR skills

It's important to stress that while the SDR role is entry-level, it's by no means easy or simple. Being an excellent SDR requires a great deal of skill and hard work.

**David Bentham** is Cognism's Inside Sales Director, overseeing a team of busy SDRs. He is an expert when it comes to scaling a B2B outbound sales team. We asked him for his top five skills that every SDR needs to master.



### 1. Organisation

To be a top SDR, organisational skills are imperative. It may not be the most glamorous part of the sales process, but it's nonetheless essential. Your admin game has to be strong!

At Cognism, we have a motto: *"If it's not in the CRM, it doesn't exist."* Most other sales teams will have a similar philosophy. Calls need to be logged quickly and in detail. You need to create follow-up tasks that others can follow easily.

It's vital to have an in-depth technical knowledge of your CRM, to help your team, but also yourself. For example, if you can quickly build reports, you can better analyse your own performance and improve it.

### 2. Active listening

Ideally, for a cold call, you want the prospect to be doing **70% of the talking**. You, the SDR, should only be talking for 30% of the time. That means you need to be a good listener.

The best SDRs listen carefully to what the customer says, as well as how they say it. Then, they respond accordingly. It's being able to do this that stops you sounding like a robot, which can happen quickly if you don't have a handle on it.

You might be making hundreds of calls a week, but your prospect wants to think that they're the only person on your mind!

### 3. Knowledge

To be a top-performing SDR, you need to know your stuff:

- Your product.
- Your industry.
- Your competition.



If you can demonstrate a breadth of knowledge to your prospects, you'll gain their trust. They will then be more open to your message and be more likely to book demos and attend meetings.



## 4. Creativity

Think of the number of cold calls, emails, LinkedIn messages and everything else a prospect receives every day; the best SDRs find a way to stand out from the crowd.

In 2019, standard sales training tells SDRs to create personalised emails based on the articles prospects write, or their educational background etc. – but now, everyone is doing that! It's all about staying ahead; thinking outside the box to get noticed.

Video is an excellent tool for creative SDRs. It's a quick and easy way to get attention. Plus, it produces results – video has been shown to **triple response rates** and increase the number of meetings booked by 500%!



## 5. Passion

Everyone needs to have a passion for what they do if they're going to become successful. The best SDRs are "sales geeks". SDR work is famous for being difficult and repetitive at times. However, the best will seek perfection within those constraints. They will consume books, articles, webinars and more. They will own the process of getting better.

This passion is what keeps you coming back, staying engaged in a repetitive job where you face a mountain of rejection.



### David's final thought

*"If you're an SDR, you should be looking to master these skills every day. Curiosity is the key. When you are genuinely curious about your prospect and how you can help them, you will succeed. When you have a sense of curiosity about other ways of doing things and how you can get better, you will win."*

## 10 questions to ask when hiring an SDR

How can you find people who demonstrate all these qualities? For most sales leaders, it all starts with the interview. You have to ask relevant, searching questions that'll help you determine if the candidate is a good fit.



**Harry Brown** and **Catherine Gardner** are Cognism's Sales Team Leaders. They're in charge of the SDR recruitment process at our company. We asked them what they look for in an SDR candidate, and the top 10 questions they would ask during an interview.

*"A good SDR interview should be like qualifying a lead," Harry told us. "You have to qualify the candidate. Are they a good fit for your company? It's not about asking questions simply to progress the interviewee to the next stage or not - you have to pick up on other things as well."*

Catherine agreed. *"There are things you have to look out for during the interview. Their tonality, are they articulate, do they have confidence when speaking to strangers? Are they able to think on their feet? Some of our top questions aren't the usual 'sales interview' questions. Some candidates are thrown off by those questions, but the best ones aren't. That's a good indicator that they'll be able to handle the pressures of a fast-moving sales job."*

*"The big thing we look for at Cognism is, do they fit into the company culture?" Harry said. "Are they going to fit into the team, will they work well with others? A good sales team is like a family and especially at Cognism, we have a very diverse group of people working for us. It's very important that we maintain that culture."*

With all this in mind, Harry and Catherine selected their top 10 questions to ask when hiring an SDR. They also gave their thoughts on why you should ask them.

### **Question 1: What do you know about the role you have applied for?**



#### **HARRY:**

*"This is a good first question to ask. As the SDR role is heavily weighted towards cold calling and outbound sales, it's important for prospective candidates to know exactly what they're getting themselves into. This kind of work, day in day out, isn't for everyone. It can be very gruelling and there can be long periods where all you get is rejection. We want to hire people who will be happy in the position."*

**Question 2: Why are you interested in a sales role?****CATHERINE:**

*"Along the same lines of the first question, we want to interview candidates who know exactly what they want to do. This question helps us understand both what they perceive a sales role to entail, helping us align candidates to our working culture, and what motivates them. Understanding what motivates a new starter early on is the most important factor in ensuring their success in the role."*

**Question 3: What do you understand about our product or service?****HARRY:**

*"A lot of candidates for our SDR positions will be sent to interviews by recruiters. We know exactly how we have prepped those recruiters. Asking this question helps us to separate those candidates who simply recite from the recruiter's hymn sheet and those who have actively done their own research on what we offer."*

**Question 4: What do you know about the company journey?****CATHERINE:**

*"At Cognism, we pride ourselves on our company journey. Similar to question 3, knowing a candidate has gone out and made the effort to learn about the company can really set them apart from the rest."*

*"What we're looking for in SDR candidates are high achievers. We want people who see a sales target and want to do even better. Those who do the bare minimum preparation are unlikely to want to achieve above and beyond the targets we set for them."*

**Question 5: What's your ideal workplace culture**



**HARRY:**

*"Retention is usually something that's difficult to maintain in entry-level sales roles. At Cognism, we're very proud of our 98% retention rate. One of the main reasons for this is that we align candidates and our company culture during the interview. This question helps us to do this. It also shows candidates that we care about their working lives and gives us a chance to really sell the business to them!"*

**Question 6: What traits does your ideal leader embody?**



**CATHERINE:**

*"Following the same lines as question 5, we want to understand exactly where a candidate sees themselves and how we can align the business with them. What kind of support would they be looking for? It's a good question because it also helps us to review our own processes. Are we missing out on something that we should be providing to our new SDRs?"*

**Question 7: Without being too personal, can you tell me about a time you've overcome a challenge?**



**HARRY:**

*"All too often in sales interviews, candidates state classic characteristics that they believe to be important without backing it up with evidence. I ask this question to understand how a person has demonstrated resilience."*

*"It's a vital trait that every SDR must have, due to the highs and lows of the job. Asking the candidate for a real-world example will help you as an interviewer determine whether they genuinely possess this quality."*

**Question 8: What non-sales skills would you like to work on during your time at Cognism?**



**CATHERINE:**

*"Rather than asking a simple strengths and weaknesses question, which candidates often prepare for, ask this question! It'll help you judge if the candidate is able to think quickly. Another important SDR trait!"*

*"When you're cold calling, you'll be speaking to people from all walks of life, from receptionists to CEOs. You'll be asked difficult questions with no preparation. This question will show you if the interviewee has what it takes to face that."*

**Question 9: Do you have any questions for me?**



**HARRY:**

*"It seems basic, but it's always important to give candidates the opportunity to ask questions about the role, company and expectations. The best interviews I've conducted have had a near 50-50 split of me asking questions vs. the candidate asking questions. It should be a two-way conversation."*

*"You need to sell the role to the candidate as much as possible. Especially if they've come from a recruitment agency, as chances are they'll have a high number of interviews in any given week. You want to be memorable. The more buy-in you get from the candidate early on, the greater the chance that they'll stay on and find success at your company. That's a win-win situation for both parties!"*

**Question 10: If you could do this interview again, is there anything you would do differently?**



**CATHERINE:**

*"At the end of the interview, just as we're preparing to part ways, I always ask the candidate to reflect on their performance. It's unrealistic to be 100% amazing during an interview, and we find that candidates often leave us wishing they had done something more."*

*"This is a question you can't prepare for, so it demonstrates if the candidate can think on their feet. It also gives them the opportunity to display their analytical ability. We want candidates who are accountable for their own actions, strive to do better and learn from every experience."*

## Promotions and compensation

A lot of SDRs aren't after greater compensation for their efforts - they're after greater recognition. SDRs often feel like they're at the bottom of the company ladder and they can be too easily ignored. A tactic used at Cognism to counteract this is to foster a culture of micro-promotions, where top-performing SDRs are elevated to mentor or team leader roles.

Compensation schemes should also be highly personalised to fit the life goals of each SDR. This will give them greater motivation to succeed in a repetitive job. If, for example, one of your SDRs wants a new car, then you can pivot commission payments as saving up to buy it!



*"It's very important to set out clear, well-defined progression plans and to manage expectations with individuals."*

– **James Ski, Founder and CEO, Sales Confidence**



*"Creating a visible culture of performance and reward has been core to Cognism's success."*

– **Nazma Qurban, Chief Revenue Officer, Cognism**

Cognism 



*"SDRs really just want recognition. They often feel like they're at the bottom of a company. Ask yourself: am I making sure that a rep is recognised if they're doing something right?"*

– **Collin Waldrip, Sales Development Manager, SalesLoft**



## Training

The days of fortnight-long sales training workshops are long gone. Today's generation of salespeople expect and respond best to a dynamic training structure.

At Cognism, we pride ourselves on being able to ramp up new SDRs in 3 days! It's a big reason why our company has scaled so well (from 0 to over 500 customers in 3 years). We can take enthusiastic but inexperienced salespeople (98% of Cognism's B2B sales team are recent graduates) and get them match-fit for selling in 72 hours.

How do we do it? **David Bentham**, Inside Sales Director at Cognism, returns to share our company secrets.

# How to ramp up an SDR in 3 days

## 1. Don't overtrain

Here at Cognism, we're firm believers of getting stuck in. Unlike other companies who provide week-long training sessions for their new SDRs, we only provide our new starters with 2 days of learning before we get them on the phones.

We give them all the information they need to get started quickly. Just the basics – a little product knowledge, a little cold calling roleplay – and no more.

We also believe in individuality in selling. We don't want robots all following the same script. Instead, what we prize are people with passion, energy and flair.

As a salesperson on the phone, you have to make an immediate impression. People who've just started a new job have a lot of drive and motivation in their first few days. It's good to take advantage of that "new job energy" and get them selling as quickly as you can!

### KEY TAKEAWAY:

*A short training schedule for new SDRs is the perfect way to take advantage of that initial "new job" energy.*

## 2. Put a robust support system in place

On their first day in the office, every new SDR is allocated a mentor who sits next to them. Typically, the mentor will be a senior colleague in the SDR team – someone who's done the job before, someone who knows the ropes and understands the pressure.

It's the mentor's role to support the SDR as they're being ramped up. They help them to set goals, get settled into the office environment and get used to the different processes and procedures. Over the first 2 days, the new SDR will sit beside their mentor and listen in as they make cold calls. A new joiner can get a lot of value from seeing how a senior colleague approaches the art of selling.

The mentor-mentee scheme is all about creating a safe space for new starters, where nothing is out of bounds. We have a saying at Cognism: "no question is a stupid question."



**KEY TAKEAWAY:**

*Encourage your new SDRs to ask questions. For them, it's the best way of learning quickly - and making them feel valued in those crucial early days in the role.*

### 3. Make use of content

There is a wealth of content out there now for B2B salespeople. Much of it is freely available. There are all manner of guides, ebooks, playbooks, webinars, whitepapers and podcasts (such as this one, for example!).

As a sales team leader, you can help your new SDRs out massively by making use of this content. Build up your own resource library and share it with your new starters.

**KEY TAKEAWAY:**

*Let your SDRs go through your content library at their own pace. Remember that different people work in different ways and at different speeds. Let each SDR find his or her own value out of your content library.*

### 4. Deliver personalised learning

Everyone learns differently. Just as we don't want conformity in selling, we don't want conformity in learning, either!

When it comes to training our salespeople, Cognism is very different from most other companies. At other businesses, they train all their salespeople the same, using the same materials and the same uniform style. We don't do that. We provide our new SDRs personalised learning materials. We recognise that people like to learn differently from one another and so we provide a variety of training methods. For instance:

- **Saif Khan** joined Cognism as an SDR in June 2019. He found that the group training and product knowledge sessions in the first 2 days were the best way for him to learn.
- **Elizabeth Alli** was another new SDR in June 2019. Her preferred learning method was to sit with her mentor, listen in on cold calls and get started on the phone quickly.
- **William Gay** also joined us in June 2019. He gained a lot of motivation and confidence from listening to sales audiobooks which Cognism provided.

**KEY TAKEAWAY:**

*Diversifying learning for your SDRs is a simple thing to do, but it will help you get the best out of them.*



## 5. Get them started!

All the learning and mentoring in the world can't compare to actually doing the job. It's still the best way for anyone to learn and get better.

So, after 2 days, we stop the learning and get our new SDRs on the phone! From the third day on, their working life is 100% cold calling. Are we worried if they make mistakes? Not a bit - making mistakes is a vital part of gaining experience and improving your skills.

### KEY TAKEAWAY:

*Don't throw your new SDRs entirely in the deep end, though. Make sure their mentor is still there to answer any questions or concerns they might have. Have the mentor sit in on their mentee's cold calls, make comments and suggest improvements.*

### Results

A common concern we hear from other companies when we explain our ramping up method is: "Aren't you just burning through leads?"

Not at all! We can tell you that this approach works. Every new SDR at Cognism started on a Monday and they were ramped up to cold calling prospects in 3 days. By Friday, every one of them had booked a demo!

Still not convinced? Take a look at these results:

- Less than one month after he joined us, Saif was booking up to 7 SQLs a week.
- In her second week in the role, Elizabeth booked 8 demos after 300 calls.
- 6 weeks after starting, William hit his July target halfway through the month.

### Other training strategies

There are many other training strategies which can help new SDRs. Here are some of our favourites:



#### Call libraries

A central resource of recorded cold calls, categorised by persona.



#### Sales camps

Training days based around topics picked by the team (e.g.: objection handling, email sequences).



#### Cold call workshops

Weekly meetings where the team listens to the week's worst cold calls and discusses areas for improvement.



#### Persona training

Recently-closed prospects are invited into the office and speak with the SDRs about why they bought the product.



*"Training is sitting in a room and absorbing information to apply at a later date. The fact is, it's better to learn from experience and actually doing the job."*

– **James Ski, Founder and CEO, Sales Confidence**



*"We really focus on the phone. When a new SDR is onboarded, for the first 2 weeks, all they do is call."*

– **David Bentham, Inside Sales Director, Cognism**

Cognism 

## Generating leads for B2B outbound

You've gone through the recruitment process, you've hired some top SDRs and ramped them up quickly. The next question is: *who are they going to reach out to today?*

The answer should be on your B2B sales lead list; a list of contacts you can move through your sales funnel to become customers. However, so many businesses waste time and leave money on the table by using lead lists that are inaccurate and out of date. That's bad news for **B2B lead generation**; if you don't have an accurate list of target customers, how can you sell?

Let's look at how you can build a list of leads that take your sales to the next level.



### 1. Define your ideal customer

When it comes to B2B lead lists, size isn't everything. What is important is that your list is well-targeted, with everyone on it having a problem that your product can solve.

Develop an Ideal Customer Profile (ICP) in your team. Your ICP is a comprehensive description of your perfect customer; the kind of customer that can find massive benefits from your product or service, while also being able to give you enough value in return to make your business profitable.

Here are some tips for building your ICP:

- Analyse your current customer base and look for commonalities between your super-users.
- Look at the industries they are in. Consider company size, location and the job title of the buyer.
- Take this a step further by talking with your best customers about the challenges they face and how your product helps to overcome them.

All of this will help you paint a picture of your dream customer. This what Cognism's ICP looks like:

## COGNISM IDEAL CUSTOMER PROFILE



### Industry

B2B Sales, SaaS



### Geography

USA



### Company Size

50 employees



### Budget

\$10,000/month



### Buying Process

Reliance on referrals for  
buying decisions



### Decision Makers

CEO, CRO



### Pain Points

Generating high-quality C-suite leads  
Automating outbound email campaigns  
Increasing sales team productivity



### Business Goals

**Short term:** grow their client base  
by 20% over the next 3 months  
**Long term:** raise their next funding  
round and expand their sales team



### Technologies

Salesforce CRM  
SalesLoft  
Chili Piper



### Attributes

Primary social media channel = LinkedIn  
Gaining a reputation as SaaS  
industry thought leaders  
Uses ABM strategies



## 2. Build your list

There are many different ways to build a list of sales leads. All of them can be effective. The method you choose depends on the budget you have at your disposal and how quickly you need to generate your leads.

The traditional way was to buy lists from lead generation companies. Today, companies can create content that is super-relevant to their Ideal Customer Profile, publish it on the web and social media and drive engagement that way.

LinkedIn is an excellent way to build your lists in 2019. Users voluntarily publish every detail of their business lives, which you can filter to create lists. However, the sheer size of LinkedIn (260 million monthly active users at last count), can make creating something comprehensive a challenge.



## 3. Scale your list

One of the problems with your list will be that many of the names on it will not be looking to buy your product at the moment you contact them.

Our advice is to use sales triggers. They're a good means of ensuring that when you do reach out, your product is more likely to be something a prospect is looking for. Sales triggers are events that signify if a company is in a position to make a B2B purchase.

Many different events could be sales triggers, including:

- **Receiving a new round of funding** - signifying the company has a renewed budget.
- **Appointing a new CEO** - this could point to a new direction for the company as the CEO wants to make their mark.
- **Hiring new employees** - which shows the company is confident about their future growth prospects.

You can look for sales triggers in the trade media for your industry or set up Google Alerts. However, the easiest way to scale your list using sales triggers is through specialist B2B lead generation software, such as **Cognism Prospector**.



## 4. Refresh your data

However you build your list, the problem with the data on it is that it deteriorates quickly. For example, every day, people move jobs or change responsibilities in their organisation. Around a third of lead data goes out-of-date every year.

This leads to sales reps wasting time trying to contact people on the list who have long since moved on. It leads to emails that bounce back. It leads to buyers using your competitors instead of you, because they don't know about you.

Your goal should be to keep your data as fresh as it can be. Use data enrichment tools, such as **Cognism Refresh**, to make sure your lead list data is always up to date.

# The two major types of B2B outbound activity

The two main types of B2B outbound activity are cold calling and emails. We'll take a look at each of these in turn.

## Cold calling



Salesforce defines **cold calling** as:

*"Any attempt to solicit business from a potential customer, via the telephone, who may or may not know about your company."*

Cold calling is a fast, cost-effective and powerful part of the outbound sales process. Rumours of its death have been greatly exaggerated; for many businesses in B2B and SaaS, cold calling is still very much alive. It's been identified that **92% of all customer interactions** happen over the phone.



*"The death of the cold call is simply not true. People still buy people. It's important to build an outbound engine for human interaction."*

– Neil Ryland, Chief Revenue Officer, Peakon



*"There is no such thing as cold calling. If you pick up the phone, and you're calling another human being, then that's warm."*

– James Ski, Founder and CEO, Sales Confidence



## Top cold calling tips

Cognism's sales team are experts in the art of the cold call. They've put together their ten top tips for refining and improving your cold calling strategy.



### 1. Planning makes perfect

Your cold calling strategy cannot be simply picking up the phone and getting on with it. You need to sit down and plan. If you're calling to pitch a product or service, you must take the time to educate yourself about it.

Doing this will increase your chances of success, because it changes the way you speak. If you know everything about the product you're selling, you will speak with confidence and authority. This builds trust with your prospects.

#### KEY TAKEAWAY:

*A good cold caller must be a product expert - you must know everything there is to know about the product you're selling.*



### 2. Define your objectives

Before you start, you must work out what you're looking to achieve from your cold call. Are you looking to secure a face-to-face meeting? Are you trying to invite them to an event? Keep your objective in mind and don't stray from it.

Remember, cold calling is just one part of a multi-stage sales process. It's not the entire sales process. Do what you need to do on your cold call, no more and no less. Don't bring up pricing, for example, if your mission is to book a demo - it's irrelevant at this stage.

#### KEY TAKEAWAY:

*Work out your goal for each cold call before you pick up the phone. Stay 100% focused on it and don't allow yourself to deviate.*



### 3. Research your prospects

We've already spoken about ICPs and sales triggers. These can be very useful on your cold calls, in terms of knowing who and when to dial.

But, as helpful as they are, ICPs and sales triggers can only take you so far. You have to dig deeper into your prospects find out as much as you can about them.

Here are some tips:



Look up your prospects on LinkedIn. It's a straightforward way to gather valuable information which could "warm up" your cold call. LinkedIn profiles can also help you to verify if the prospect is in a decision-making position.



Has the prospect published a blog or written any articles online? If so, read them! They'll help you to work out the kind of person you'll be talking to. If the articles are data-heavy and full of facts and stats, then you know to adjust your pitch accordingly. Always try to speak the way your prospect speaks - it's a great way to build rapport!



Are there any career events in the prospect's life that you can mention? For example, have they recently won any industry awards or had a big promotion? Use these events in your cold call to help forge a stronger relationship with them. Remember that everyone likes to be flattered from time to time!

#### KEY TAKEAWAY:

*Conduct your own primary research on every one of your prospects. Use the insights you gain to make your cold calls even more successful.*



## 4. Timing is everything

There are times of day when people are happy to take cold calls. There are also times when it's just not convenient. Research when the best times are in your industry.

Contrary to popular opinion, lunchtime can be a very good time of day for cold callers. It's the time when PAs and secretaries ("gatekeepers") take their lunches, while the CEO or Director ("decision-maker") often works through lunch. You could cut out the gatekeeper altogether by calling at this time!

#### KEY TAKEAWAY:

*Research the best times to cold call and get dialling! Study your most successful cold calls and see if they happened at similar times of day.*

## **5. Get past the gatekeeper**

If you do find yourself talking to a gatekeeper, you need to have a plan to get past them and get through to the prospect. Here are some ideas:

- **Try to sound senior** - keep calm! Speak confidently, slowly and concisely. If you can do this, you will sound experienced and important. The gatekeeper may be less inclined to hold you up.
- **Don't sell to the gatekeeper** - remember the gatekeeper is not a decision-maker, so don't pitch to them. In fact, say as little as you can get away with. But always be friendly and professional.
- **Give the impression that you know your prospect well** - use first names when you ask to speak to your prospect.

### KEY TAKEAWAY:

*More than 50% of cold calls are answered by some sort of gatekeeper. Devising effective strategies to deal with them is an important first step for any sales rep.*

## **6. Qualify your prospects**

**Jonathon Ilett** is the Sales Director at Cognism. He is responsible for managing our team of BDMs, as well as conducting demos and negotiating and closing deals with VP and C-suite decision-makers.

As such, he is well-placed to give us a run-down of cold call qualification, why it's important and the best tactics for getting it right.

### What is qualification?



#### **JONATHON:**

*"Qualification is the process of evaluating whether a prospect is a good fit for your product or service. The core principle is to identify the prospect's pain and judge if your solution can be prescribed to fix it."*



## Why is it important?



### JONATHON:

*"All salespeople are fighting against the clock. We've all got targets to hit and a finite amount of time in which to hit them. You don't want to be wasting your time on a prospect that isn't a serious contender for making a purchase. This is why qualification is important - it saves you time and means that you can quickly see if the prospect is a good candidate to be progressed to the next stage."*

## How can you qualify correctly?

At Cognism, we teach our SDRs to qualify cold call prospects according to the BANT criteria:



### Budget

Is the prospect able and willing to spend?



### Authority

Is the prospect the ultimate decision maker?



### Need

Does the prospect have a problem that your product can solve?



### Time

Is the prospect looking to buy quickly?

All of the questions we recommend our SDRs ask during their cold call qualification are based around these four areas.

Jonathon had some more tips:



### JONATHON:

*"Use open-ended questions to get the prospect talking. These are questions that don't elicit a 'yes' or 'no' response. They help to get a conversation going. The more information you get from the prospect, the easier it is to qualify them."*

*"If you find you can't qualify the prospect, walk away. Never close a client that you know you won't be able to deliver to."*

**Sample questions**

- ✓ What does your current business development process look like?
- ✓ How does your sales team generate new leads?
- ✓ Who would normally be involved in buying decisions for new tech?
- ✓ What tools are you currently using?
- ✓ What regions are you looking to prospect into?
- ✓ Have you used data providers in the past?
- ✓ What did you like about them? What did you dislike?
- ✓ What are your current business growth goals?
- ✓ Are you in a position to take on new clients right now?

**KEY TAKEAWAY:**

*Use the BANT criteria to qualify prospects on your cold call. Ask open-ended questions to make the process easier.*

**7. Use a script**

**Charlie Beale** is a Business Development Manager at Cognism and the co-writer of our SDR Playbook. He was responsible for developing the cold call script that every new SDR at Cognism is given.

This script is at the heart of our B2B outbound strategy and we're delighted to present it to you now, in full!

**The structure**

The script is broken down into the following 5 segments:

1. Opening
2. Pitch
3. Questions
4. Conversation
5. Closing

It's important to stress though that this is used as a general guide, not an absolute rule. At Cognism, we encourage all our SDRs to find their individuality in selling. We all convey our messages in different ways, using different tones and vocabulary. The structure is there to help our reps with the flow of the conversation, not to pin down their every word.

After all, the last thing any prospect wants to hear is someone reading robotically down the phone – that's the surest route to cold call failure. When it comes to cold calling, one size definitely doesn't fit all.

## Opening

This is the very start of your cold call. More often than not, if you're calling a senior-level prospect, it's the gatekeeper (typically a PA or secretary) who will pick up the phone.

***"Hi, it's Charlie from Cognism. Is (first name) available?"***

The gatekeeper will likely respond with:

***"What's it regarding?"***

This is your chance to get creative. If it's a first-time call, here are some replies you can use:

- ***"New business."***
- ***"Your client acquisition process."***
- ***"How you find new clients."***

Think about how you can make this work with your offering.

If it's a follow-up, try:

- ***"Oh, I'm just following up on an email I sent to (first name)."***
- ***"I'm just chasing up on some emails. They'll know what it's regarding."***

When speaking to the gatekeeper, don't be afraid to think outside the box. It could make the difference between being put through to the prospect, or never having your message passed on.

One great tip which we teach our SDRs at Cognism is to always sound senior. If the gatekeeper thinks you're a management-level peer, rather than a salesperson, they're much more likely to transfer your call.

Assuming your call is transferred and the prospect picks up...

***"Hi, it's Charlie from Cognism. How are you?"***

***"Good."***

***"Great! Look, (first name), I'll keep it brief as I appreciate you're busy. I came across (company name) online and I can see you do (B2B sales/marketing/other). Have you got 30 seconds for me to explain the nature of my call?"***

It's vital to establish rapport early on in your cold call. Acknowledging that the prospect's time is limited, and asking for their permission to continue, is a good way to start.

***"Okay."***

## Pitch

Once you've got the all-clear from the prospect, it's time to pitch. Again, the pitch isn't something that's set in stone. It can change depending on the SDR and who they're talking to. But there are 3 things it must be:

- **Clear** - the prospect must be able to understand it. Make sure you adapt the pitch for each prospect. It must be relevant to them and their industry.
- **Concise** - think of it as a springboard to further the conversation; you don't need to reveal absolutely everything about your business. One good tip is to think of your pitch as a tweet - what can you convey in 280 characters or less?
- **Easy to remember** - you don't want to get tongue-tied or lose the flow on your cold call. Keep in mind 2-3 facts or stats and use them every time.

An example would be...

***"We help companies like yours prospect and gain new clients by giving you access to our lead generation tool that contains over 400 million B2B profiles."***

Or...

***"We provide companies like yours with direct and accurate contact details for key decision-makers in your target industries and locations. Ultimately saving you an abundance of time prospecting."***

When you've delivered your pitch, it's time to progress to the next stage.

## Questions

Asking open-ended questions (questions that don't require a simple "yes" or "no" answer) is one of the most essential things any cold caller can do. Remember that in any cold call, the prospect must do 70% of the talking, while the salesperson should do only 30%.

Why is this? Because the more the prospect talks and feels they're being listened to, the more likely they are to buy. In a recent study by HubSpot, **69% of buyers** said that the one thing they wanted from sales reps was to *"listen to my needs."*

Open-ended questions are a great technique for showing the prospect you're a good listener. They open up the conversation, allowing you to gain vital insights that'll help you in the last stages of the call.

Here are some good examples:

- ***"How do you currently go about finding new clients?"***
- ***"What does your outbound process look like at the moment?"***
- ***"How are you generating new leads?"***
- ***"What are your frustrations with your prospecting data currently?"***

These types of questions usually work very well with senior-level prospects, as they are focused around common pain points for a business - finding new customers, **B2B lead generation** and data quality.

## Conversation

Having delivered your pitch and asked some searching questions, by now your cold call will be in full swing. There are a number of routes your call could go down. The prospect could hang up, or they could be very much open to a conversation.

There are a number of tactics you can use to keep your prospect engaged. Here are some good methods for getting the most out of your conversation:

### **Tonality**

Tonality – the way you speak – is very important. You must always sound excited and enthusiastic (the old *“smile and dial!”*), especially if the prospect is being blunt and unresponsive. A lot of times, the prospect will be doing this on purpose to see how you react.

Remember that often you'll be calling people who are sales professionals in their own right, and know all the tricks of the trade.

### **Pauses and hyperbole**

We teach our SDRs to use pauses and hyperbole to emphasise certain points. For example:

***“Our lead generation tool gives you access to 400 million B2B profiles...globally.”***

Just using a simple pause will ensure that important points are quickly highlighted and are more likely to stick in the prospect's mind.

### **Mirroring**

Doing this can lead to great results on your cold call. All you have to do is keep your ear out and listen to how the prospect speaks and the words they use. Then, imitate the way they talk. It's as easy as that!

What's the purpose behind this? It's proven to be an effective way of building rapport and increasing the odds of being “accepted” by the person you're talking to. It relaxes the prospect and makes them feel more comfortable talking to you.

### **Repetition**

Don't be afraid to repeat what the prospect says in a questioning tone. You'll be surprised how much someone will reveal when they're questioned like this.

For example, if the prospect says something like:

***“All my sales team manually find their leads.”***

You should then respond with:

***“Your sales team find ALL their leads MANUALLY?”***

Repeating their words back to them acts as a guide, leading them towards revealing more about their business – what the process looks like, how long it takes, the amount of resources they put into it. These are further pain points which you can then address one by one, steering them ever closer to the final stage in your cold call.

### **Closing**

Following a conversation, you might be ready to go in for the close. If you feel like you can close early, if you've addressed all the key pain points and the prospect has shown interest in seeing your product in more depth – go for it!

***"Look, (first name), I appreciate this is a lot to take in over the phone. It would be great to show you the tool and run some live searches for you. Have you got 15 minutes free later this week?"***

At this point, you're likely to encounter some objections. The prospect will come back with some obstacles that you'll have to overcome. One of the most common ones that'll crop up at this stage is:

***"Please could you send me some more info first?"***

Some good responses to this are:

***"I could send you some more information, but by the time you've read through it, I could answer the questions you have. What would you like to know?"***

Or...

***"It would be quicker and more useful to show you the platform. How does (day) at (time) sound?"***

An element of judgement is needed, however. If you feel the prospect is on the move or very busy at the time, and perhaps pushing harder for a demo will irritate them, you need to judge whether sending them a further email would be easier.

In which case, a good option is to find out exactly what information they want in the email. Like this:

***"What would you like me to include in the email?"***

This will get the prospect to reveal their concerns, which you can then address on the phone - eventually leading them back to the close.

Try out the above strategies for handling objections and persuading a hesitant prospect to agree to a demo. Before you do so though, you must first gauge the receptiveness of the prospect. Some people do not respond well to being pushed for a meeting.

When you get to the close, always make sure you qualify the prospect further before you let them go. Like so:

***"Great! In order to tailor the demonstration as best as possible, so you get the most out of it, I just need a few details. Please can you tell me about your target (industries/job titles/locations)."***

This will help the BDM or account executive to personalise the product demo to exactly the prospect's needs, increasing the chances of a sale. Then, when that's over, it's time to end the call.

***"That's great, thanks a lot for your time just now (first name). I really appreciate it. Do you need anything else from me or would you like me to include anyone else on the call?"***

You can also repeat the agreed time of the demo back to the prospect. It's another way of making sure the demo stays in their mind and means that (hopefully!) they'll show up.

***"That's great, thanks a lot for your time today (first name). I look forward to seeing you on (day) at (time)."***

**KEY TAKEAWAY:**

*Write down a cold call script that works for you - but don't stick to it rigidly. Follow a set structure but within that, give yourself room to be flexible.*



## 8. Learn how to handle objections

Knowing how to handle objections during a cold call is a key skill that all B2B salespeople have to master. Especially so if you're working in a scaling business, which may have limited manpower, resources and technology at its disposal. When you're scaling, you need all the wins that you can get!

By learning how to handle objections smartly, you will increase your chances of closing a sale.

### What is objection handling?



HubSpot defines **objection handling** as:

*"Objection handling is when a prospect presents a concern about the product/service a salesperson is selling, and the salesperson responds in a way that alleviates those concerns and allows the deal to move forward."*

It's important to remember two things about objection handling:

- **Objections aren't a sign that the prospect isn't interested.** Quite the opposite, in fact - they're an indicator that the prospect is interested, but doesn't yet have a full understanding of your product or service. It's your job as a salesperson to give them that understanding.
- **Most objections are entirely valid.** You can't just brush them off. You have to provide insight and give the prospect a compelling reason to buy from you.

### Why is objection handling important?

Being able to handle objections effectively can determine whether a deal is won or lost.

Always address objections on your cold call as quickly as you can. The longer you leave it, the stronger the prospect's concerns will become - and the harder it will be for you to change their mind.

### A five-point plan for cold call objection handling

In B2B outbound, preparation makes perfect. This is especially true when it comes to handling objections, which could come at any time during your cold call and be about any subject.

Don't improvise and make it hard for yourself. Instead, ensure you have a process in place. Cognism's sales team uses the following five-point plan when they face objections on their cold calls:



## LISTEN

- Listen to the prospect and their objections.
- The more the prospect feels like they're being heard and understood, the more likely they are to buy.



## ASK

- Ask qualifying questions (see above).
- The more information you gain from the prospect, the easier it is to handle their objections.



## SOLVE

- Create a sense of urgency. Remind the prospect of the costs of not buying your product now.
- Answer the prospect's most urgent objection first. This makes answering all the other, less troublesome objections much easier.



## CONFIRM

- Find out if the solution you've offered meets the prospect's requirements. Ask them if they're happy with what you've suggested.
- Repeat the prospect's words back to them – for example, if they've objected to the pricing, you can say, "*I understand the pricing is higher than you expected.*"



## MOVE ON

- Don't spend more time on one objection than is strictly necessary. Listen to the objection, ask questions, define it, provide a solution – and then progress to the next one.
- Never go back to an objection once you've addressed it.

### KEY TAKEAWAY:

*Investigate each objection, ask searching questions, listen to the prospect, uncover the reason behind each one – and then use the information you've learned to handle them effectively.*



## 9. Analyse and adapt

To understand how well your cold calling strategy is working, collect as much data as you can. Take notes on every call. Everything you hear is information that may come in useful later. Even if you're logging calls in your CRM later, don't rely on your memory.

What times of day are best to call? How many calls does it take to get through to a prospect? How long are you spending on each call? How can you improve these numbers? Record your calls and go through them with your mentor, to look for ways to enhance your skills.

One useful piece of advice is to A/B test your cold calls. Try out different versions and approaches. Do certain lines or ways of speaking work better than others?



**KEY TAKEAWAY:**

*Be scientific about your cold calls – log your results, analyse the data and learn from any patterns that emerge.*

**10. Keep calling!**

It's a well-known fact that cold calling is a numbers game. On average, it takes **eight cold call attempts** to reach a prospect. The more calls you make, the more opportunities you have of making a sale. So even if you've had a bad call or numerous rejections, always make one more dial.

The trick is to remain positive and persevere. Never give up. Rejection is a fact of cold calling life. But there are tactics you can use to turn even the most difficult cold call to your advantage.

If the prospect says they're not interested, ask them "Why?" This makes the prospect come up with reasons for their rejection – reasons that may help you to improve your pitch or technique in the future.

**KEY TAKEAWAY:**

*Don't take rejection personally. Stay professional, ask the prospect for feedback and thank them, even if it's negative. Then, take a deep breath and move onto your next call. Never let rejection affect your confidence!*

## B2B outbound email



**Sales Hacker defines** outbound email as:

*"Outbound email is a type of email sent by sales reps and business developers to establish a connection with anyone they've identified as a potential customer. Email outbound is primarily used in B2B types of businesses."*

Outbound email is a cost-effective way to reach lots of prospects quickly, so it's an attractive option for scaling B2B and SaaS companies with limited resources.

- **81% of SMBs** rely on email as their primary customer acquisition channel.
- For every \$1 spent on outbound email, you can expect to see an average return of \$42.

If you're a sales rep working in a scaling business, it's essential that you master the outbound email. Think about it this way - the outbound email is highly scalable - you can send out 1,000 emails a lot quicker than you can make 1,000 calls.

## 6 steps for building an effective B2B outbound email

Here are 6 tips on how to craft a B2B outbound email that delights your audience and makes them take action.



### 1. Focus on benefits, not features

The recipients for your outbound emails will more than likely be high-level decision-makers. They're not going to have much time on their hands. If they open your email, they want to know what's in it for them, pretty quickly.

That means you can't waste time telling them how great your company is. Your recipient doesn't want to know how long you've been in business or any other accomplishments.

So, get to the point! Identify your prospect's pain points (you'll know them from your ICP) and talk about how your product solves them. Focus on the benefits of your product and how it will improve the prospect's life for the better!



### 2. Drop names (in a targeted way)

Nothing makes a buyer sit up more than thinking a competitor has an advantage over them.

If a company in your prospect's industry is using your product and getting results, tell them. Don't be afraid to drop their names. If you can, use statistics to show how your product benefitted them. It's all social proof, which creates FOMO (fear of missing out!) for your prospect.

However - and this is absolutely vital - *just make sure the clients you mention are in the same sector or industry*. Social proof only makes an impact if it's targeted and relevant.

Another benefit of this approach is that it shows your prospect that you've done your research. It helps to position you as an expert.



### 3. Don't be boring

Possibly the most critical piece of advice here; make sure your outbound email is interesting! If your prospect is bored after the first paragraph, they're probably not going to bother reading the second one. You need to grab their attention straight away.

Don't be afraid to use humour in your email. You can also be provocative. A conversational style usually comes over well.

The best advice is to judge your audience. The ideal tone of voice will differ depending on the seniority of the client. Using slang, emojis and text speak probably won't work on company CEOs - but may produce good engagement from marketing agencies, for example.



## 4. Always include a Call To Action

Your outbound email must have an overarching goal. It could be to book a meeting or demo or renew a contract; it could be to make people aware of an event and get them to register or buy tickets. Whatever it is, your goal will be something you want your recipient to do after they've read your email.

The only way to get your prospect to take action is to tell them what to do. This is your Call To Action, or CTA. Here are 3 CTA tips:

- If you are offering something for free (e.g.: trial, scoping), mention it in your CTA.
- If your offer is time-sensitive, tell them. Create some urgency!
- Make your CTA very clear. Don't have more than one CTA in an email.



## 5. Make sure your subject line stands out

The first thing your recipient will see when your email lands in their inbox is the subject line. When they see this, they will make an instant decision on whether your email is worth reading or not.

Your subject line has to be as good as it can possibly be. Here's Cognism's best practice on subject lines:

- Keep it short – 50 characters max.
- The subject line should match the content and tone of the email. Be honest!
- Use personalisation if you can.



## 6. Always test

If you're sending outbound emails at scale, chances are you'll be using email automation software, such as **Cognism Prospector**. This software will collect response data on your outbound emails, such as open rates, click-through rates and reading time. Study this data and use it to improve your email campaigns.

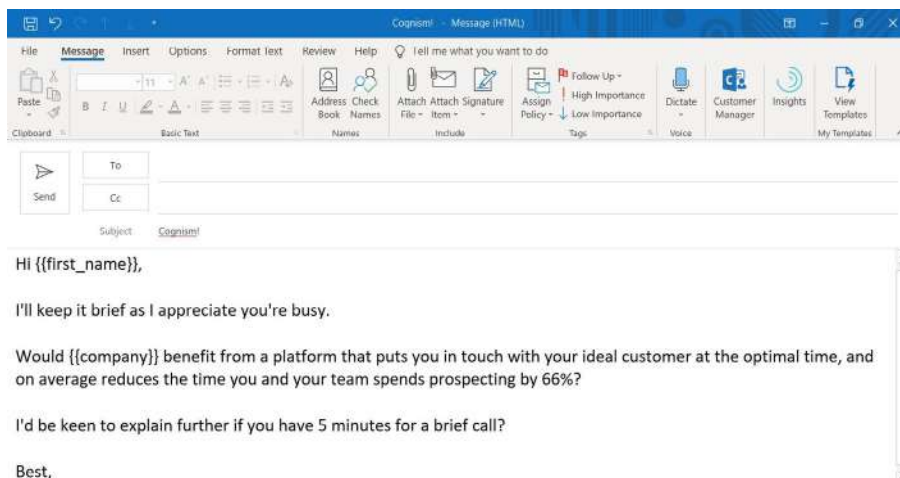
A/B test different messages to find out what resonates best with your target audience. You can also experiment with what days and times you send emails. Boosting responses, even by a small amount, can make a big difference.

## 5 examples of successful outbound emails

Looking for more practical advice? We've studied the **B2B data** from our own email campaigns and we have identified five outbound emails which had the highest response and engagement rates. They are drawn from all stages of the sales cycle.

These are Cognism's five most successful outbound emails, presented with commentary on why they were so effective!

### 1. The first email in a cadence

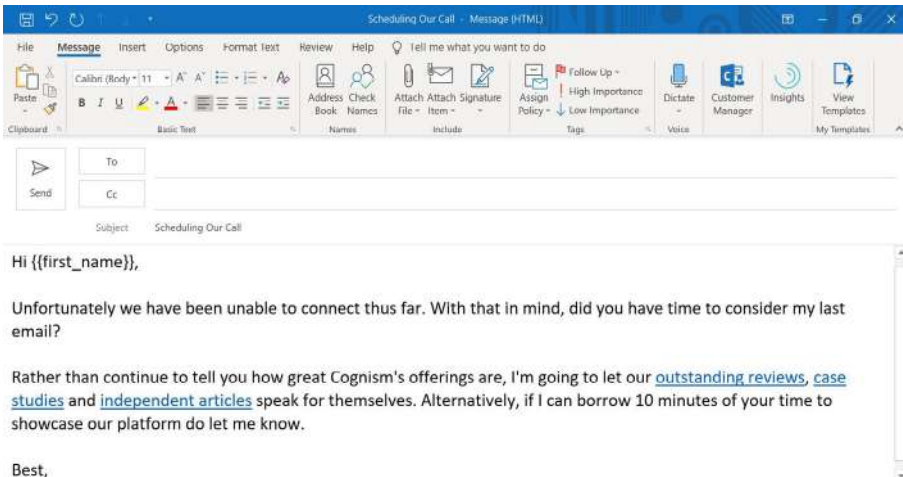


#### Why does this email work?

- **One-word subject line** - one simple word: "*Cognism!*" Our email campaigns have shown us that one-word subject lines lead to higher response rates. The use of our company name creates intrigue and makes sure it sticks in the prospect's mind.
- **Short and concise** - at only 60 words, this email is shorter than the average outbound email, which is 125-150 words. Yet our campaigns demonstrate that the shorter the email, the higher the response rates.
- **It's personalised** - the email mentions the prospect's name and their company name. We've found that including both increases conversion rates by up to 20%. Personalisation can determine the success or failure of an outbound email!
- **Easy to read** - sentences and paragraphs are as short as possible. If an outbound email isn't easy for a prospect to read, it'll simply go straight to 'Deleted Items'!

- **Facts and statistics** - the sales rep has included a statistic that shows the value that Cognism can deliver to the prospect.
- **Clear and simple CTA** - the prospect is being guided to one single outcome - are they free for a short phone call?

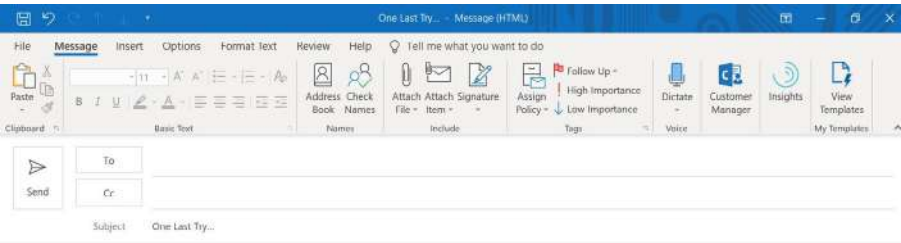
## 2. The follow-up email



### Why does this email work?

- **Subject line as CTA** - the subject line acts as a de facto CTA, directing the prospect to take a specific action. Also note the length - only 19 characters.
- **Short and concise** - at 69 words, it's shorter than the average outbound email. The shorter they are, the more chance you have of getting a response!
- **Useful resources and advice** - the sales rep has included links to reviews, case studies and articles showcasing Cognism's value. The links aren't just to the Cognism website, but to articles hosted on external sites. Doing this shows the prospect that you're not just there to sell, you're providing value for free. The prospect is much more likely to remember you and engage.

3. The referral introduction email



Hi {{first\_name}},

Are you the right person to discuss business development strategy? Alternatively, if it makes sense for me to reach out to one of your colleagues, do let me know.

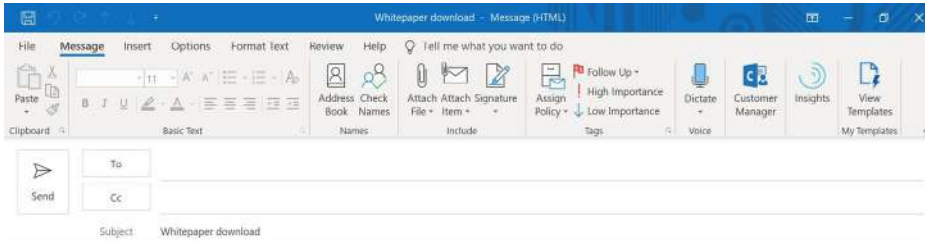
Cognism is allowing hundreds of organisations to save time and money prospecting new clients. I'd be keen to show you how too. Do let me know if you're free for a brief call.

Thanks and kind regards,

Why does this email work?

- **Humourous subject line** - don't be afraid to use a little humour! It's a good way to engage the prospect and get them to open your email. Remember the old business adage: people will forget what you did, people will forget what you said, but they will always remember how you made them feel. Again, note the length: very short at 15 characters!
- **Brief and to the point** - the sales rep has written a direct message that clearly states their reason for emailing. This email is only 68 words. Don't waffle; get to the point as quickly as possible.
- **Value statement** - a short statement displaying the benefits of Cognism has been included - the platform will save time and money. Think of a short value statement for the product or service you're selling. What is the most important thing, or the two most important things, that it does for your clients?
- **Short CTA** - always include a CTA. Think about what you want to get from the prospect.

#### 4. An email to inbound contacts (following a whitepaper download)



Hi {{first\_name}},

Following up on your request for our whitepaper "10 Ways to Improve Your Cold Calling Strategy" I am keen to get your feedback and insights on the guide, as well as offer any further assistance you may need.

Are you free for a quick chat on {{1\_business\_days\_from\_now}} or {{2\_business\_days\_from\_now}} morning?

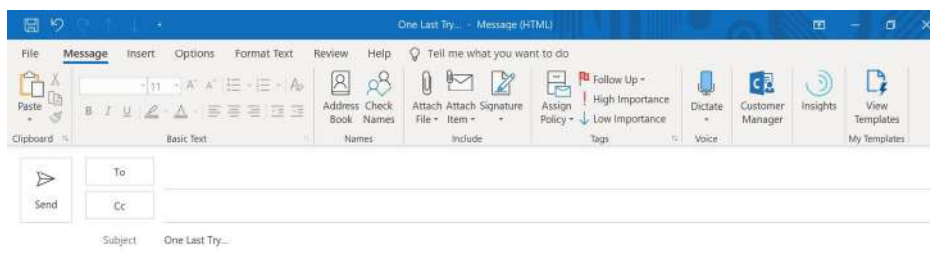
All the best,

#### Why does this email work?

- **Clear subject line** - the subject line makes it very clear why the contact is being approached. Always use the subject line to share the reason why you're getting in touch.
- **Short and concise** - the shortest of our templates yet, at only 56 words. We've found that this email has got a 16% response rate, which is 4x the industry standard!
- **Show interest** - the sales rep is showing that they're interested in what the contact thought of the whitepaper they've downloaded. This is an excellent way to build rapport. With emails to inbound contacts, it's all about creating a relationship, which you can then build on to potentially make a sale.
- **Offer advice** - the sales rep is offering the contact some assistance. Again, this is a great way to get the contact to engage and build rapport.
- **Create urgency** - the CTA gives the inbound contact a choice of times in which to respond. The times are not too far in the future. This is a good strategy, as it gives the contact time to read the whitepaper, but not too long for them to forget about it.

## 5. The break-up email

We asked our friends at **Juro, the contract management platform**, which of their emails got the highest response rates. They provided us with this winning break-up email. **Alex Moir**, their Business Development Representative, told us that this email received very high response rates – both positive and negative!



Hi {{first\_name}},

Are you the right person to discuss business development strategy? Alternatively, if it makes sense for me to reach out to one of your colleagues, do let me know.

Cognism is allowing hundreds of organisations to save time and money prospecting new clients. I'd be keen to show you how too. Do let me know if you're free for a brief call.

Thanks and kind regards,

### Why does this email work?

- **Short and simple** – only 32 words. This break-up email cuts straight to the point, with a higher chance that the prospect will finish reading it, and therefore bother to reply.
- **An antagonistic tone** – the wording suggests to the prospect that they don't have the authority to make a decision on the matter. When read this way at the end of a long string of outbound emails, it can warrant negative responses. It can also result in a simple "I am the right person, but not right now" type of response, which can give you good leverage to reach out in a few months' time.
- **A referral request in the CTA** – by asking the prospect to pass them on to a colleague, the sales rep is creating another chance for engagement. If the referral is successful, it can lead to a very beneficial outcome. This is one of the most powerful tools in a rep's arsenal, as it gives you the credibility of a recommendation by someone from within the team.



## B2B outbound cadences: combining cold calling and emails

Even more powerful than cold calls and emails on their own are combining the two in a sequence, along with other touchpoints (e.g.: social or video). This is known as a cadence.



**G2 defines an outbound cadence as:**

*"A scheduled sequence of touchpoints created to establish a connection with a potential buyer."*

This section will show you how to build a winning outbound cadence, and provide two example cadences aimed at different senior-level audiences.

### How to create a B2B outbound cadence

When creating your outbound cadences, you need to remember three important numbers:

**45      25      17**

This is Cognism's formula for outbound success. We'll deal with each of these numbers in turn. First up...

#### **45**

45% represents the largest single demographic of buyers today. Surprisingly, these are **millennials** (the generation defined as being born between 1981 and 1996, with ages between 22 and 37 years old). This cohort has sparked a revolution in culture, politics, and business. They bring with them needs and aspirations which are markedly different from older generations.

What does this mean for B2B outbound? Quite simply, it means you have to up your game! The way millennials consume content is unique. They are online more often than their older peers and they engage across multiple channels - Facebook, Twitter, LinkedIn, Instagram, Snapchat, to name just a few!

So, to engage and convert the biggest group of B2B buyers today, you need to understand where millennials spend their time and how they want to buy. You're prospecting an audience whose attention is split across many different channels. Your outbound cadences have to rise to that challenge if you want them to succeed.

With this in mind, here are some tactics for creating outbound cadences which convert millennials:

- **The first step in the cadence is crucial.** With so much noise and online chatter vying for millennial attention, you have to make a big first impression!
- **You will need to create multiple touch points across multiple channels.** Millennials are used to frequent engagement with their favourite brands and businesses. And it's not just the length of the cadence which matters - you'll have to diversify, pushing out your message on many different networks at once.
- **Personalisation is key.** Cognism's own research into outbound emails shows that simply by adding the prospect's first name and company name into the text of an email, you can increase conversion rates by up to 20%. But you can do even better than that! Forensically research each prospect. Swot up on their LinkedIn profile. Find out if they've recently won any awards, for instance. Use sales triggers to discover if they've been promoted or changed jobs. Leverage that information to create a truly personal cadence that won't fail to get responses.

25

The second number in our formula, 25%, signifies the percentage increase in conversions you can expect to see, if you use video at the right time in your cadence.

When you think about the majority of your buyers now being millennials, it makes sense that video should play a key role in engaging with them. They've grown up in a world where online video has exploded in accessibility and popularity. Video must play a part in your outbound cadence - your conversion rates will thank you for it!

Here are some stats to back up the power of video, taken from our own research:

25%	If used in the second or third step in a cadence, video increases conversion rates by 25%.
95%	If video is used in a confirmation email on the day of a demo, attendance rates are lifted from 75% to 95%.
75%	75% of our late-stage prospects who received a personal video message from us decided to buy.

Here's an example of a B2B outbound video in action. This is a video recorded by **Alex Shorthose**, a Senior Business Development Specialist at Cognism. He sent it to one of his prospects at the end of the month. It's a great illustration of how video can be used to engage with potential buyers.

## 17

### The ultimate B2B outbound cadence



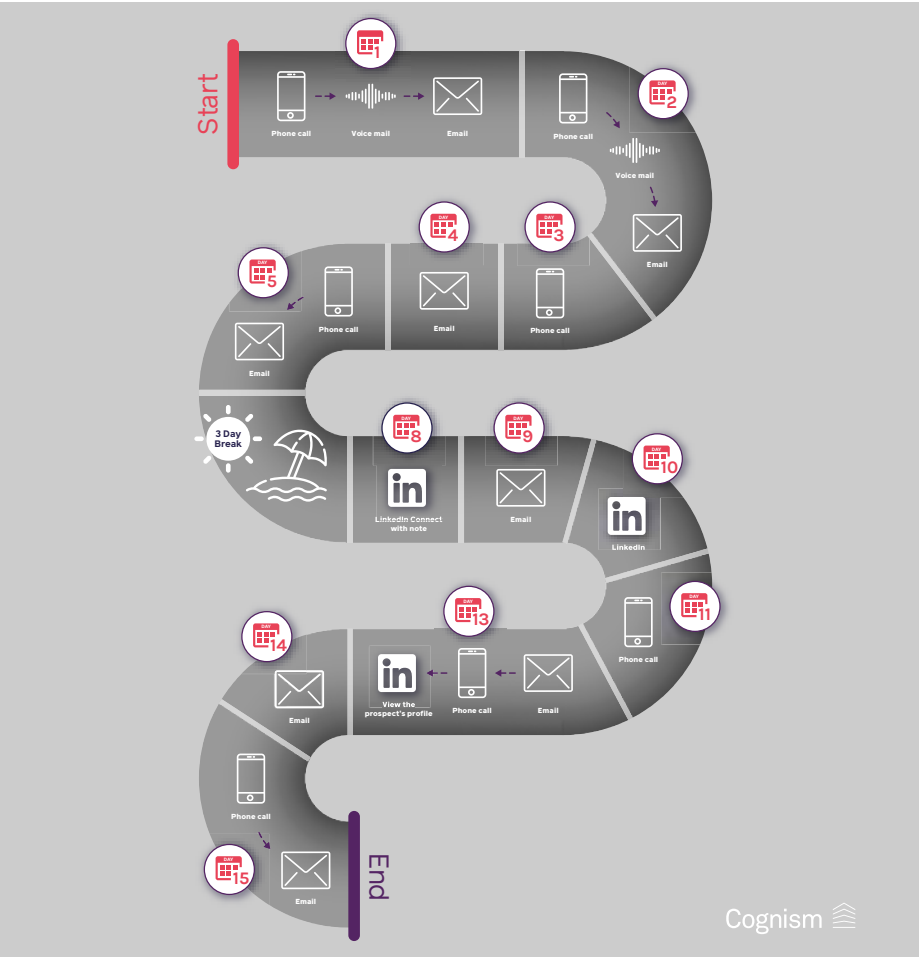
There are a few things to note:

- **The first step must be multi-step.** Use phone and email together in the first step of your cadence.
- **You must include phone calls in your first step.** Our sales reps found that 80% of their most successful cadences contained phone calls in the first step.
- **Video increases engagement rates** - but it's best used further down the cadence. This is where it will have the greatest impact and increase scalability.

# 2 examples of successful B2B outbound cadences

## Sales leaders

As a **B2B lead generation** platform, one of Cognism's biggest markets are sales leaders and directors. Outreaching to this senior-level audience is something we do every day. There is a skill in communicating with this group, however. Their calendars are usually chock full of appointments and they don't have much time, if any, to listen to an outside sales pitch. Is there a technique for engaging with this audience quickly and in a way that maximises success? We asked our sales team to provide us with a winning cadence geared at sales leaders. Here is an overview of the cadence:



## The purpose of the cadence

The cadence is designed to be fast and hard-hitting. The intention is to create urgency, to connect with the prospect as quickly as possible and to get appointments booked in a short space of time.

The ultimate goal is to get the prospect to convert to a meeting in 15 days. It's the cadence of choice for the sales rep who's working in a scaling company and wants to generate some quick wins.

## Results

Here are the results generated by this cadence:

- 341 calls were made and 341 emails were sent.
- Of those 341 emails, only 5 bounced - a bounce rate of 1.47%.
- 116 emails were opened - an open rate of 34.52%.
- Of those opened emails, 38 of them had the prospect click on a link - a click-through rate of 32.76%.
- 10 emails received a positive response where the prospect booked a demo - a conversion rate of 2.98%.

## The cadence



The first step is to call your prospect, pitch your value proposition to them and attempt to get them booked in for a meeting. It's an introductory call, but by trying to get a meeting booked straight away, the sales rep is building up some urgency.

If you can't get through, leave a voicemail explaining your product's value and promising to follow up with an email.

Follow this call on Day 1 with an email.



Email

**Subject:** Cognism!  
**Sent:** Jul 15, 2019, 09:15  
**From:** roshan@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first\_name}},

I wanted to present myself as interesting and witty. Alas, I called and emailed instead...

I am contacting you regarding Cognism- a software tool that helps you to lower your client acquisition costs by providing intelligent data for your business.

Would you be interested in finding out more?

Thanks in advance,

Keep this short and to the point. Remember that sales leaders have very busy lives and are more likely to respond to a succinct and snappy message. This email is only 53 words long. A good outbound email should be based around your product's benefits, rather than features. It should demonstrate the value that your product can deliver to the prospect. Don't just reel off a list of product features - instead, think about the advantages that the prospect will gain from using it. You're much more likely to get a response that way.



Phone call

+



Voice mail

Start the second day with a phone call showing your product's value. See if the prospect has considered your earlier emails and phone calls and if they're interested in booking a meeting. Again, if there's no connection, leave a voicemail!



Email

### Scheduling our call

**Subject:** Scheduling our call  
**Sent:** Jul 16, 2019, 13:05  
**From:** roshan@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first\_name}},

I thought I'd touch base and see if we could pencil in a time to speak about how Cognism can help you. How is {{2\_business\_days\_from\_now}} looking for you?

Best,

The follow-up email on the second day is even shorter than the first - 31 words. The messaging is easy to read and simple to understand. It's demonstrating value ("Cognism can help you") while still reinforcing the intention to get a meeting in the diary. The email ends on a strong CTA, asking the prospect to consider connecting on a specific date.



Phone call

If you haven't had any traction over the first few days, now's the time to ask the prospect for alternative contacts. Call them, check if they're the decision-maker and if there's anyone else in their organisation that you should be talking to.

What's the purpose of doing this? If they are the decision-maker, it may spur them into a conversation. If they're not, they may provide you with the contact details of someone who is.



Email

**How Cognism can help {{company}}**

**Subject:** How Cognism can help {{company}}  
**Sent:** Jul 18, 2019, 09:05  
**From:** roshan@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first\_name}},

I'm sorry we haven't been able to connect.

Cognism can help {{company}} in three ways:

- We save you time manually prospecting for new clients
- We provide intelligent contact data (incl. direct emails & phone numbers) so you will be at the front of your prospects' minds
- Smart sales triggers to give you unique insights and notifications as to the optimal time to reach out

Don't just take my word for it - check out our G2 Crowd Reviews [here](#).

If you aren't the right person to deal with this, could you please point me in the direction of somebody who is?

Thanks In advance,



This email works in much the same way as the last phone call. The intention is to find out if the prospect is qualified to deal with your query, and if not, to get them to refer you to a better qualified colleague.

The email also keeps the value proposition to the fore. It provides three clear reasons why Cognism can make the prospect's life easier. It deepens the value proposition by providing something new - a link to a page of external customer reviews.



Phone call

This phone call should also provide something new. Call the prospect and quote a relevant case study or industry statistic. It's a way of maintaining interest and making the prospect look again at your product.



Email

#### A bit more information

**Subject:** A bit more information  
**Sent:** Jul 19, 2019, 12:15  
**From:** roshan@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first\_name}},

I thought I'd provide you with a bit more information around Cognism and illustrate exactly how we can help {{company}}.

I've researched {{company}} and the wider industry and it's clear that sales technology is growing rapidly. Companies need to embrace the technological change that's taking place to stay ahead of the game.

Cognism is a sales acceleration solution that will save you time and lower your client acquisition costs. I've attached some reading around how.

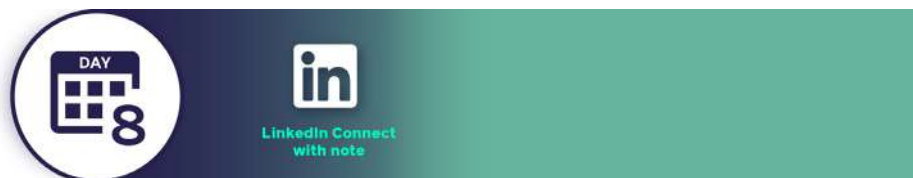
Would you be interested in having access to our platform so I can show you in more detail how we'll help?

Thanks in advance,

The purpose of this email is to provide knowledge and insight. By saying that they've researched the prospect's industry, the sales rep is building up trust and rapport. This is backed up by the attachment of a case study that's relevant to the prospect's industry. The email includes a clear value statement ("save time / lower costs").

Finally, it ends with a strong CTA. Never forget the ultimate goal of your cadence is to secure meetings!

*Note: the cadence now includes a three-day break. This is to give the prospect time to read the materials you've provided, and also prevents them from getting fatigued.*



After the three-day break, it's time to ramp up engagement. On the eighth day, connect with the prospect on LinkedIn. Include a polite note with your connection request. Boost their ego in no more than 20 words!

Remember to research the prospect thoroughly. It can really help you with this message. Have they recently written an article that you can quote? Have they won an industry award or been featured on an external website or publication? Leverage that information to keep your conversation going.



Email

### Scheduling our screen share

**Subject:** Scheduling our screen share  
**Sent:** Jul 23, 2019, 08:55  
**From:** roshan@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first\_name}},

I know how much of a good fit Cognism is for {{company}} and I would like to show you.

Can we schedule a 15-minute screen share? I will show you how Cognism will lower your client acquisition costs and grow your client base.

When's the best time for you?

Best wishes,

At this point in the cadence, it's important to offer the prospect something of value. The sales rep suggests a 15-minute screen share. This is something that won't take up too much of the prospect's time, while also giving them a fairly detailed overview of the product.

An open-ended question is used to close the email. Open-ended questions (questions that don't require a "yes" or "no" answer) are the best techniques for staying engaged with a prospect.



LinkedIn InMail

If they haven't responded already, the prospect may be getting a little tired of seeing your name crop up in their inbox! Defuse this tension by sending them a LinkedIn InMail.

Apologise for your persistence, but stick to your game plan. Tell them you really think your product is a good fit for them and you'd like to show them over a short demo.



The day after the LinkedIn message, call the prospect directly and repeat the same message. Apologise for your persistence, but try to persuade them to commit to booking a meeting.



**Did I reach out to the wrong person?**

**Subject:** Did I reach out to the wrong person?  
**Sent:** Jul 27, 2019, 09:05  
**From:** roshan@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first\_name}},

It's a shame we haven't been able to connect thus far.

Would you mind pointing me in the direction of someone who can help?

Thanks in advance,

This email is a simple request to be introduced to other stakeholders. Again, it may be the catalyst for the prospect to initiate a dialogue.



Phone call

Call the prospect and repeat much the same message from the above email. You're sorry you haven't been able to connect but you'd like to move forward by contacting someone else.



View the prospect's  
LinkedIn profile

Take some time to scroll through the prospect's LinkedIn page. Maybe like or comment on one of their recent posts. This shows that you're still very keen.



Email

One last try...

**Subject:** One last try..  
**Sent:** Jul 28, 2019, 13:00  
**From:** roshan@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first\_name}},

I've been trying to reach you because Cognism will help {{company}} to reach new clients at the optimal times.

Can we organise a quick call to discuss this further?

If you're not the right person, please could you point me in the direction of somebody who is?

Thanks in advance,

This email is the last roll of the dice. It's simple, direct, short at only 52 words and includes everything you've communicated so far. If you get a response at this late stage - great! If not - it's time to move on to prospects new! Which brings us to...



This is the break-up phase of the cadence. You've tried everything, but it hasn't quite worked. Give the prospect a call and tell them you recognise that now isn't the right time for them. But...leave the door open. Don't write the opportunity off completely. Say that you'll get back in touch in 6 months' time. Who knows what might change for the prospect between now and then?



**Let's revisit this at a better time**

**Subject:** Let's revisit this at a better time  
**Sent:** Jul 29, 2019, 09:00  
**From:** roshan@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first\_name}},

I have been trying to reach you for a number of weeks, as I know Cognism can help {{company}} to reach new clients at the optimal times.

Even though I know how much we can help, I will respect your silence as now may not be a good time for you.

I will try to get hold of you in the coming months. In the meantime, you know where I am should you need anything.

All the best,

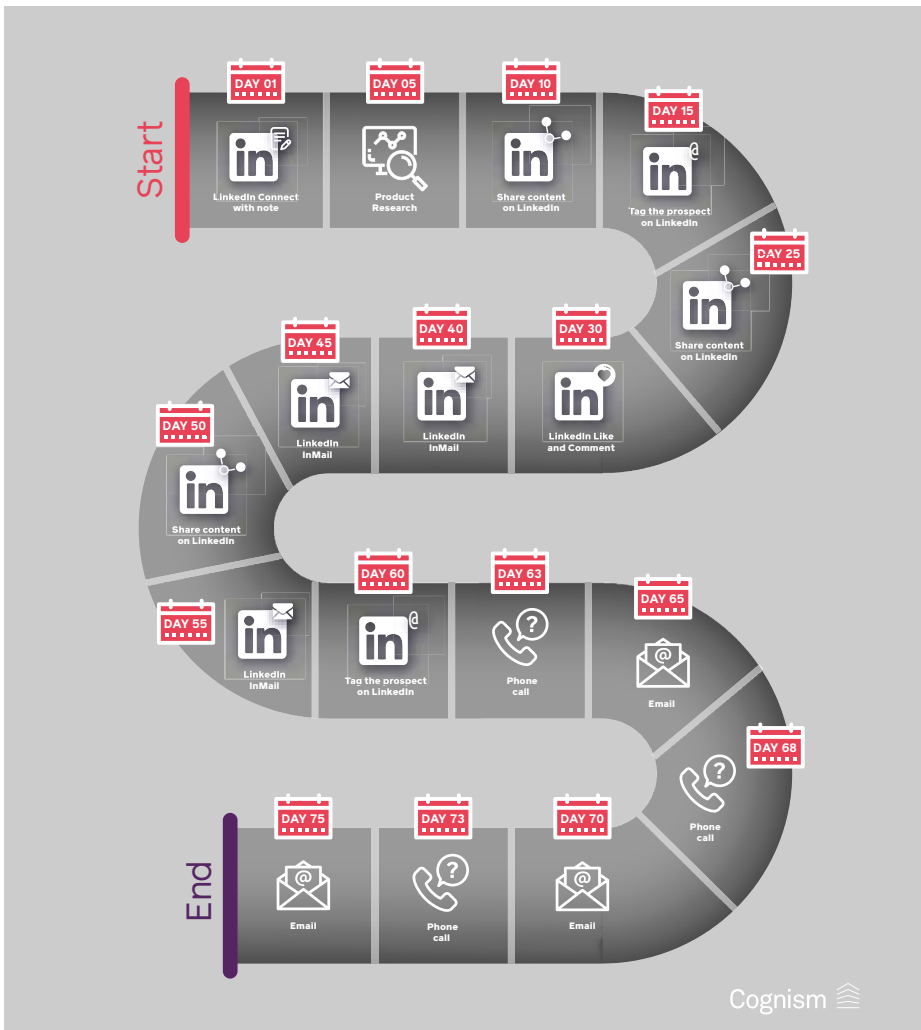
The final email in the cadence copies the messaging from the final phone call. It's a break-up, but it finishes on the intent to follow-up in the future. Until you hear a definite "no", the opportunity isn't closed...just put on hold!

## CEOs

Every B2B salesperson worth their salt knows that engaging with CEOs can be a tricky business. Typically, they have little time at their disposal and they have needs and wants that are very different from their lower-level colleagues. This makes prospecting CEOs to be a difficult undertaking - difficult, but not impossible.

We asked **Charlie Beale**, Cognism's Business Development Manager, for a winning cadence aimed at CEOs. Charlie shared with us an epic 75-day cadence, which he's used before to engage with C-suite prospects. We also asked **Hector Forwood**, our Senior Business Development Manager, for his advice in pitching to this highly specific and specialised audience.

Here's an overview of the cadence:



### The purpose of the cadence

Before you start out with this cadence, first of all forget everything you've learned prospecting to managers, team leaders, department heads and the like. Prospecting to CEOs requires a very different mindset. Don't go charging in asking for a meeting right off the bat; you haven't earned it yet! Expect it to take months of engagement before you get to that point.

This cadence isn't designed to get a quick win; quite the opposite, in fact. It's about building a relationship, establishing a meaningful dialogue and nurturing the prospect over an extended period of time. The usual sales pattern won't work with a CEO. Instead, you'll have to show that you're...

- Fully prepared by researching them and their industry thoroughly.
- Ready and able to share relevant, insightful content.
- Focused on the challenges and pain points that affect them.

If you can do all that, then - and only then - you will get your meeting. As always in B2B outbound, but especially so in this case, persistence really will pay off.

### Results

Charlie saw some impressive results by using this cadence:

- Email response rates of up to 15%.
- LinkedIn engagement rates of up to 52%.
- Asset download rates of up to 24%.



## The cadence



LinkedIn  
Connect  
with note

Charlie Beale



**Charlie Beale** • 15:00

Jun 01, 2019

Hi {{first name}},

I want to make sure I have the right information when I call {{company}} about your lead gen. Where can I find out more about this, or is there anyone you can point me towards?

Thanks,

For a lot of salespeople, this first touch may seem counter-intuitive. It doesn't mention anything about the sales rep's business or product. It's not providing any useful information or memorable statistics.

What it is doing, however, is starting a relationship. By asking the CEO to provide you with information, instead of the other way around, you're increasing your chances of getting a response. CEOs are generally outgoing and they love to share knowledge and talk about their companies. They're used to being the public face of a business and being asked questions about it. If you can play on that, you'll find that the CEO will be more than willing to engage.



### Product Research

In the run-up to Day 5, take the time to complete detailed research of the CEO's company, product or service. Browse the company website and take notes on their offering and USP. Read any blogs or articles on the website, to get an idea of the company's tone and voice. Watch any videos or listen to any webinars or podcasts - especially if the CEO is involved. If the company offers a free demo of the product, make sure you book yourself in for one. This way, you'll be fully prepared for future interaction with the CEO.



### Share content on LinkedIn

Ask your B2B marketing team (if you have one) if they have any content you can share on your LinkedIn feed. It can be anything - a blog, a video, a webinar - but it must be focused on the CEO and their business or industry.

If the content you require doesn't exist, work with marketing to see if they can produce something for you. A good piece of advice - and this is something that has helped at Cognism - is to hold a weekly meeting between your senior salespeople and marketers, to identify the content pieces that are needed going forward.



### Tag the prospect on LinkedIn

Find a relevant article (preferably one published by your own company) and tag the CEO in it. The purpose of this is threefold:

- It furthers engagement with the CEO - look out if they reply or like!
- It shows that you're keen to share knowledge, not sell a product.
- It keeps you and your business in the CEO's busy mind.



**Share  
content on  
LinkedIn**

On Day 9, you shared content about your company. On Day 25, you have to do something different. This time, you have to get personal. Share some thoughts about your industry. Focus on the pain points that might be affecting the CEO.

End your post with a CTA - a question asking for people to respond. If the cadence has been working well, then you may get a reply from the CEO!



**LinkedIn  
Like and  
Comment**

Scroll through the CEO's Recent Activity tab. Have they shared an article, or better yet, written one themselves? If so, like and comment on it - especially if it's relevant to your product or service.




LinkedIn  
InMail

Now that you've seeded some good, valuable content, it's time to ramp up engagement. Send the CEO a LinkedIn message, including a short offer. If the CEO did recommend that you talk to a colleague, make sure you mention them! Leveraging internal champions will give you even more of a buy-in with the CEO.

It doesn't matter hugely if you don't receive a reply at this stage - this is just the first step in building a deeper relationship. Here's an example:

Charlie Beale



Charlie Beale • 13:00

Jul 11, 2019

Hi {{first name}},

Thanks for pointing me in the direction of {{colleague name}}. I really think there's a good opportunity for Cognism to help {{company}} find new customers.

Would you be open to a quick phone call to explore the possibilities?

Best,



LinkedIn  
InMail

If you don't receive a positive response on Day 40, follow up on Day 45 with another LinkedIn InMail. This time, instead of going for the standard sales message, try one of these tactics:

- Drop in a referral from an internal or external contact.
- Boost the CEO's ego by mentioning a recent occurrence in their career - an award win, perhaps, or good quarterly financials, or the completion of an important project - anything that will get their attention!
- Keep the student-teacher relationship going by asking them for something. A good idea is to look at their LinkedIn feed. Have they announced that they're going to be speaking at an event in the future? Most CEOs are active participants on the trade show and industry conference circuit. Use that intel to your advantage! But make sure the speech is relevant to your product or service.

Like so:

Charlie Beale



**Charlie Beale** • 18:00

Jul 16, 2019

Hi {{first name}},

I saw you're going to be speaking about {{topic}} at {{event}}.

I can't attend the event unfortunately, but I'd love to see a sneak peek of your speech. It sounds really useful!

Would you mind sending me your notes?

Thanks in advance,



**Share  
content on  
LinkedIn**

At this point in the cadence, the content you share must be super-relevant and hyper-focused on the CEO's business or industry. Your best bet is to look at your own list of clients. Choose one based on the following criteria:

- They must be in the same sector as the CEO's company.
- They must be based in the same geography (or nearest to) as the CEO's company.
- They must be the same size as the CEO's company (e.g., a startup, SMB or enterprise).

Then, ask your marketing team to produce a case study for the client (if one doesn't exist already). Share the case study on your company's LinkedIn page and your own LinkedIn page. If the CEO sees it, they'll see how your business has helped another exactly like theirs – a powerful message which you can return to later in the cadence.



**LinkedIn  
InMail**

Continue the mutual knowledge sharing by sending the CEO a recent article or industry report. Keep your eyes peeled for any developments in the CEO's sector. They will be watching the business news channels and websites like a hawk, so you should do the same.

Include a CTA asking them to respond. As ever, remember that CEOs love to share their insight and comment on events!

Charlie Beale



Charlie Beale • 12:30

Jul 26, 2019

Hi {{first name}},

I saw this article on {{website}} about {{topic}}.

{{Link}}

What are your thoughts about it?

Best,



Tag the  
prospect on  
LinkedIn

By now, you should've built up a good rapport with the CEO. You'll know the sort of approaches they like and the kinds of messages they respond well to. Find another good article or news story that matches their business and tag them in it.



### Phone call

The time has come - time to pick up the phone! Call the prospect and give them your best 30-second pitch about why your product matters and which pain points it can solve.

When calling a CEO, however, remember that the best times to call are very different from other workers. Here's Charlie Beale's advice:

- Mornings aren't usually a good time as the CEO will be distracted, planning and working through all the varied tasks they have to accomplish that day.
- Lunchtime is better. CEOs often work through their lunch break, while other workers are out. It's also a good time to reach the CEO without having to speak to the gatekeeper. Chances are, their PA or secretary will be out on lunch, meaning you can bypass them and get straight to the decision-maker.
- Later in the day or after working hours (5-8pm) are also good times to call an executive. Their colleagues may have already left for the day, meaning that there will be less activity in the office. The CEO may be more relaxed and more open to receiving a call.



### Email

For this touchpoint, you'll have to provide the CEO with a proof of value (POV) document. Typically, this is a longer-form document (maximum 2 pages), which sets out on a practical level how your product or service will help the CEO's business. The clue is in the name - you have to prove the value of your offering.

Unsure about what a good proof of value document should contain? Hector Forwood has some guidance for you:

- Start with a short introduction about the end goals. What is the best result the CEO can expect from using your product?
- Then progress to a list of benefits your product or service can provide. What are the 3 most important things you can deliver for them?
- Then give a POV timescale. List in detail the steps you'll need to take to get the prospect onboarded and using the product. Include the resources required from each company for each step.



- Set some customer success parameters. What will the prospect be required to do in order to maximise their chances of success?
- Make sure to include any legal considerations (if relevant and/or necessary).
- End the document with some bullet points detailing the immediate next steps. These can be anything from promising to provide more information by a certain date to setting a time for a follow-up call or face-to-face meeting.



**Phone  
call**

Use this call to check in with the prospect, if they haven't already replied. Try and schedule a meeting with them, as per the next steps from your POV document.



**Email**

Follow up on your POV document by sending the CEO something of benefit. A report detailing the difference that your product or service can make, or a comparison between your company and your biggest competitors.

This is the last touchpoint before break-up, so don't waste it!

#### **What do you think?**

**Subject:** What do you think?  
**Sent:** Aug 10, 2019, 13:30  
**From:** charlie.beale@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first name}},

I thought I'd send you our latest battlecards, comparing Cognism to our main competitors.

What are your thoughts? I'd be happy to jump on a quick call to discuss this further.

Best wishes,



Phone  
call

You've done your best, but it hasn't worked. It's time to break up.

Give the CEO a call and tell them that you'll close their file...for now. Don't completely end it, though. Say that you'll check up in 6 months' time, just in case.



Email

This is the very last touchpoint in the cadence. Follow up your phone call with an email, repeating the same break-up message.

**Not a good time right now**

**Subject:** Not a good time right now  
**Sent:** Aug 15, 2019, 09:00  
**From:** charlie.beale@cognism.com  
**To:** jaroldan@salesforce.com

Hi {{first name}},

Although I know Cognism could hugely benefit {{company name}}, I recognise that now isn't the right time for me to pursue this any further.

I'll stop reaching out, but in case finding new clients becomes a pressing issue in the future, please feel free to contact me at any time.

All the best,



We asked **James Isilay**, Cognism's founder and CEO, how he likes to be prospected. He gave us the following tips:

- **Focus on the pain points.** They're likely to be the only things that a CEO will respond to.
- **Keep your messages short and simple.** Don't waste a single word. A CEO's calendar is full enough without having to read email essays! If your email is too long, it will just get deleted.
- **Be persistent. It will take some time for a CEO to reply.** But if you can convince them that your product can remove their pain, you will get a positive response.

## Perfecting B2B outbound: top tips from 3 top SDRs

B2B outbound isn't something that you can lock down and set in stone. You have to keep reviewing your processes and continually make adjustments and improvements.

**Elizabeth “Lizzie” Alli, Hugh Campbell** and **Saif Khan** are three of Cognism's top-performing SDRs. We asked them for their tips on how to succeed in one of the hardest jobs in B2B outbound. Their thoughts will help you and your team perfect the outbound process. Over to them!

**Hi team! First question. What qualities/characteristics are essential to being a top-performing SDR?**



**LIZZIE:**

*“Resilience, persistence and drive. As an SDR, you’re going to face a lot of rejection every day. You have to be a really tough person to be able to handle that. Having great support from your team will help you to get through it.”*



**SAIF:**

*“My number one quality for a top-performing SDR is aspiration. You should always be aspiring to do better. If you’re given a target, don’t just try to achieve it – try to smash it! Always go one hundred times better!”*



**HUGH:**

*“You have to have confidence on the phone. People can tell if you’re not speaking confidently, or you don’t know enough about the product you’re selling. My number one quality for a top sales rep is a willingness to learn – you need to know everything about your product. Only then can you sell it effectively!”*

**Cognism is a fast-growing, scaling company. Our sales team headcount has doubled in less than 12 months. What's it been like working in sales here?**



**HUGH:**

*"I love the fast pace. It's really exciting. But it can be really difficult. You can't rest on your laurels in outbound sales. If you have a great month in January, in February you're back to zero again. Support from your team is so important in keeping you motivated."*



**SAIF:**

*"I used to work in corporate sales. Cognism is the first startup I've worked for. What I love most about working at a scaling company is that you see the company grow as a direct result of your efforts. If the company hires new SDRs, then that's because we've all been doing our jobs properly!"*



**LIZZIE:**

*"What I love about Cognism is that everyone in sales started in the same position. Our CRO and Sales Director used to do cold calls! It means that they know how hard the SDR job can be. We can all relate to each other in a way that doesn't happen in other companies."*

**How do you know when you're succeeding as an SDR? Is it purely based on metrics, or is there a "feeling" behind it?**



**LIZZIE:**

*"I'd say it's a bit of both. Metrics obviously give you a clear picture of how you're doing. They're especially useful when you first start out. But you can also tell when you're improving, based on the conversations you have. One thing that really helped me was listening back to my least successful cold calls and learning from them, making adjustments to my tonality and pitch."*

**HUGH:**

*"It's all about growing professionally and personally. Are you hitting your targets? Great! But are you also learning and improving what you do? A top sales rep should always be looking to diversify and get creative. Don't just do what everyone else does. Cold calls and emails are a core part of the SDR role, but there are lots of other channels you can use. Create videos and send them to your prospects. Attend as many industry-relevant events as you can."*

**SAIF:**

*"All sales jobs are measured, but what's important to me is, are you delivering value to your prospects? Are you solving their pain points? Are you helping to make their lives easier? That gives you a great feeling."*

### What tech has helped you in your role? Do you have to use tech to be a top sales rep?

**SAIF:**

*"Tech is important, for sure. The top four for me are SalesLoft, Salesforce, LinkedIn - and Cognism! Our own platform is ideal for **B2B prospecting**. To succeed as an SDR, you definitely need to plug into a sophisticated CRM. That'll help you out so much when it comes to organising your time."*

**HUGH:**

*"Lead generation software is essential for me. At Cognism, we use our own tool, **Prospector**, to find leads and engage with them."*

**LIZZIE:**

*"You could do this job without tech. You could just pick up the phone and have a copy of the Yellow Pages next to you. But why would you want to? Sales is a numbers game. You're up against the clock every single day. Anything that helps you speed up the process and drives efficiency has got to be good."*

**How do you juggle the different aspects of the SDR role? There's the cold calling, the email outreach, but also the admin side as well. How do you cope with that?**



**HUGH:**

*"Your CRM is your best friend! I use Salesforce every day. Create tasks, track and update them daily if not hourly! If you've got something to do - just do it! Don't put it off. In sales, you can easily get swamped. At Cognism, we also have a zero inbox policy, which is a big help to me in organising tasks."*



**LIZZIE:**

*"Good admin is half the battle for an SDR! Get a good workflow going for yourself. Put in your own rules and KPIs. For instance, if I go to an event, then I always block out time in my calendar the following morning for follow-ups."*



**SAIF:**

*"A lot of salespeople overlook Outlook, but it's vital for keeping track of your time. I log everything on my Outlook calendar, even lunches! That way, you know exactly where you should be and what you should be doing every hour and every minute of the day. One thing we do at Cognism is "power hour", where the whole team just gets on the phones and cold calls for an hour straight. That's a great way to reset yourself and focus on your core responsibilities."*

**Are there any processes that you've put in place for yourselves that have really helped you succeed?**



**LIZZIE:**

*"One thing I do is allocate time every month to review my own performance. What were my successes, what were my failures? What's working for me right now and what isn't? Doing this gives me some great takeaways for improving my performance."*


**SAIF:**

*"You have to have in-depth product knowledge to be a successful sales rep. You need to buy in to the product to sell it! Go beyond the product training your company gives you. Block out time to use it for yourself. If you have any questions, ask your product team. Build up good relationships with them."*


**HUGH:**

*"Keep an eye on the collateral that your marketing team produces. They can be a great resource for the SDR. Read your company blog and case studies and use the messaging to improve your pitch."*

**How do you manage expectations in sales? How do you keep the motivation going?**

**HUGH:**

*"If I'm given a target to make X number of calls in a day, then it's my job to do that. It's as simple as that for me. Always keep your targets in mind and organise your day to hit them. Saif already mentioned them, but our power hours are critical to getting you 100% focused on cold calling. Ignore everything else, pick up the phone and get selling!"*


**SAIF:**

*"Don't overthink it. Keep moving ahead, keep calling. Believe in your own ability. In my experience, self-belief is the key to consistency. If you go into sales with confidence and persistence, then you'll succeed. Don't let rejection get to you. So one call didn't go your way? Never mind - move onto the next one! The more calls you make, the better you'll get, and the more successful you'll become."*


**LIZZIE:**

*"If you're having a bad week and you're feeling demotivated, don't be afraid to ask for help! Sales is a very fickle business. You can have the best day you've ever had followed by the worst. If you've got a good team around you, then the support is there, all you have to do is ask for it."*



**I'm an SDR and I'm failing to hit target. What advice can you give me?****SAIF:**

*"LinkedIn is a great tool to find people but it's also a great knowledge hub as well. If you're having difficulties with a part of your role, search for it on LinkedIn! Chances are, someone with experience has written a blog about it or hosted a webinar about it. Leverage the knowledge of the online sales community. Write a post asking your peers for their advice. Learn from them and use their knowledge to sell better."*

**HUGH:**

*"Good salespeople should always be good listeners. Listen to your peers and colleagues. Speak to people in other departments - CS, marketing, product. Your own company is a huge resource of knowledge and information. Get a complete picture of your company so that you can create a seamless journey for your prospects."*

**LIZZIE:**

*"If your company hasn't got a mentor-mentee system in place, then I recommend that you start one right away! This is where a senior salesperson is given a junior colleague to look after and advise. It's a brilliant scheme because it means you'll be learning from someone who understands the pressures of the job and knows the best shortcuts to success."*

**It's my first day as a sales rep and I've never done this job before. What would your top tip be?**



**LIZZIE:**

*"Just pick up the phone and do it! The best teacher is experience. Don't be afraid of the unknown - learn from it!"*



**SAIF:**

*"When you first start, just focus on getting your pitch and conversation right. It's not about closing deals on day one. It's about building your confidence and getting familiar with selling your product to others."*



**HUGH:**

*"Outbound sales involves a lot of trial and error. Don't be afraid to experiment. Try out different styles of pitches until you find one that works."*

## The science of B2B outbound

At Cognism, we're fond of the saying, "*sales isn't an art - it's a science.*" B2B outbound is your pathway to introducing a scientific sales process into your business. With outbound, everything can be measured and tracked. It creates **B2B data**, which you can use to analyse your performance and sharpen your selling. It creates a data-driven sales team, fully focused on goals and revenue.

Follow the steps outlined in our guide and you too will make your growth predictable and repeatable. Be sure to share your successes with us on our social media:



We look forward to hearing from you!

## Contact Cognism today

Cognism is the number one platform for B2B outbound. Our all-in-one, globally compliant prospecting solution is designed to help B2B sales teams scale as quickly as possible.

Using our technology, you can:

- Build personas of your ideal customers, using a range of person and company filters.
- Generate leads from our global database of B2B firms and individuals.
- Take advantage of our event-based triggers, which highlight the best times to outreach.
- Engage with your leads through multi-touchpoint sales cadences.

Interested? Then book a demo with us today!



**Request your demo now**

Cognism 

# **ABM (ACCOUNT - BASED MARKETING):**

Beyond the hype

# Contents

What do you know about ABM?	121
What is ABM?	121
Who is ABM for?	121
What are the benefits of ABM?	122
How to run the perfect ABM campaign	122
ABM: does it work?	146

## What do you know about ABM?

For B2B marketers, the 2020s will be the decade of account-based marketing (ABM). It's already taken the B2B marketing world by storm in recent years. But there's a lot of misinformation out there about ABM, what it entails and what it can do. Some marketers have hailed it as a "magic bullet" which can cure all marketing ills. Others are confused about what it is and how you can get started with it.

The truth is, there's no trick to ABM. It isn't a gimmick or an antidote to every marketing malady. It's a process, just like any other process in B2B marketing. While it can undoubtedly deliver numerous benefits to a business, ABM takes time, skill and lots of hard work.

Over the course of this guide, we're going to take you beyond the hype and provide you with clear, practical advice on how you can add ABM to your marketing efforts, right away. We've assembled a world-class team of ABM experts, who will give you their top tips and advice. We'll give you templates and infographics which you can use in your business today.

So, let's draw back the curtain and find out everything there is to know about ABM for 2020 and beyond!

## What is ABM?

HubSpot defines **ABM** as:

*"A highly focused business strategy in which a marketing team treats an individual prospect or customer like its very own market. The marketing team can create content, events, and entire campaigns dedicated to the people associated with that account, rather than the industry as a whole."*

This is ABM in a nutshell. It's a strategy that focuses on a defined set of key companies (accounts) and personalises campaigns to decision-makers within those organisations.

## Who is ABM for?

Account-based marketing will work for any organisation targeting key accounts, but it's a particularly good option for scaling B2B or SaaS companies. This is due to the difference between B2C and B2B marketing. With B2C, you're trying to attract a wide audience of individual consumers with high volume, low value sales. With B2B, you have to market to multiple decision-makers in each company; deals are usually higher in value and lower in volume.

# What are the benefits of ABM?

ABM can deliver numerous benefits to a business. Several recent studies have highlighted the advantages of ABM:

- A **study by Demandbase** found that 19% of companies using ABM for at least a year reported more than 30% growth in revenue.
- A **SiriusDecisions survey** found that 91% of marketers using ABM see a larger deal size, with 25% seeing their deal sizes grow by more than 50%.
- **ITSMA** found that companies using ABM saw an 84% rise in reputation score and a 74% improvement in customer relationships.

As well as enhanced ROI, ABM offers two other core benefits. First, it uses resources more efficiently than traditional marketing, by focusing on high-value accounts with targeted content. And second, it helps to develop a shared mindset between sales and marketing, bringing the two teams more closely together.

# How to run the perfect ABM campaign

Some companies believe that switching from a conventional marketing strategy over to ABM is difficult. Running your first ABM campaign may be daunting, but it's not an insurmountable challenge. We've identified 10 steps to set up, launch and evaluate the perfect ABM campaign. Plus, we have an all-star cast of ABM specialists who will share their knowledge as we go.

## 1. Choose the right type of ABM

There are 3 types of ABM:

ONE-TO-ONE	ONE-TO-FEW	ONE-TO-MANY
<p>Picking up a handful of high-value accounts and putting all your budget into targeting them.</p> <p>This works with 1-5 accounts max.</p> <p>The highest-value accounts should be targeted with one-to-one.</p>	<p>Sector-specific - selecting a larger pool of accounts in the same industry.</p> <p>This works with 10-30 accounts max.</p> <p>Target higher-value accounts with one-to-few.</p>	<p>More like traditional digital marketing, but with more customer-centric messaging.</p> <p>30+ accounts.</p> <p>Lower-value accounts are best suited to one-to-many.</p>

## How do I choose the right type of ABM?

Deciding which ABM method is right for your business is dependant on several factors, including the nature of your company and the type of accounts you want to target. Important elements to consider are deal size and lifetime value.



### TOP TIP

*"Run a pilot programme. Probe the market with the one-to-many method. If you get good results, you can ramp up the pilot into one-to-few or one-to-one. You need to know the science behind your ABM operation to help you make informed decisions."*

**- Owen Steer, ABM Specialist, Punch**



### TOP TIP

*"Start small and get an understanding of what you want to achieve."*

**- Nick Mason, Founder and CEO, Turtl**

## 2. Align marketing and sales

When salespeople first encounter ABM, it can cause them some anxiety. On the face of it, ABM is asking them to work with fewer leads. What salesperson wants to do that? Yet, ABM can't work properly unless sales are brought fully on board with the process. It's vital that the two departments are aligned around a shared strategy and goals.

Much like ABM itself, alignment can sound like hard work. But numerous organisations around the world have benefitted from having sales and marketing working closely together (some call this approach "smarketing"). Here are some notable success stories:

- SAP introduced an ABM programme with sales and marketing alignment; the result was a **\$27 million increase in new pipeline opportunities**.
- Next Caller grew their revenue by **40% for 16 consecutive months** after implementing a sales and marketing alignment plan.
- Successful smarketing helped SalesLoft close a **\$100k enterprise account**.

## How can I get sales to buy into ABM?

Start by asking your sales team some questions:

- How satisfied are you with the leads you're currently getting from marketing?
- Do you always have the content or resources you need for closing a deal?



Most salespeople are frustrated by these two issues: having too many low-quality leads and not having enough useful content. ABM solves these pain points. It involves qualifying leads at the start of the sales cycle, not the end. It encourages sales and marketing to join forces and pinpoint ready-to-buy leads who have a high probability of converting. By doing this, these high-value leads can be targeted with much more focused and relevant content, making a sale even more likely.

The best way to align marketing and sales around ABM is to demonstrate its value; once you have buy-in, agree a timeframe and move onto the next step.



#### TOP TIP

*"If sales don't understand why ABM is happening and the process and steps that a lead has gone through to be classified as a marketing-qualified or sales-qualified lead...then there's no importance placed on it. If sales understand what is happening and why, they're much more likely to jump on those leads and close them. It should be seen as a joint effort to close that lead."*

**- Joe Birkedale, CEO, Project36**



#### TOP TIP

*"Getting buy-in from internal stakeholders, first and foremost, is absolutely essential. Of course you need to secure a budget for your ABM campaign, but make sure you're setting realistic expectations. Be aware that it's a long-term campaign. ABM is not a short-term revenue grab. Avoid the pitfall of failing from the get-go by setting realistic expectations."*

**- Owen Steer, ABM Specialist, Punch**

### 3. Assemble your ABM team

ABM requires a change in thinking around the way your business markets and sells. When you've proved the value of ABM to your sales team, it's time to start working together much more closely.

Start by assembling an ABM team of people from your business. They will all have different roles but common aims. These could include:



#### **SDRs/sales reps**

The inside sales reps that solely focus on outbound prospecting.



#### **MDRs/marketing reps**

The sales reps responsible for following up on all marketing demand.

- ✓ **Sales operations**  
The people/department responsible for driving efficiency in your sales team.
- ✓ **Marketing operations**  
The people/department responsible for driving efficiency in your marketing team.
- ✓ **Campaign marketers**  
The people responsible for developing campaigns end-to-end and who are versed in multi-channel marketing.
- ✓ **Content producers**  
Content writers, graphic designers, video producers.
- ✓ **Customer success managers**  
The people/department responsible for developing customer relationships and promoting retention and loyalty.

Arrange an introductory meeting involving all these stakeholders. Use this time to define your ABM goals (see Section 4) and select the metrics you want to track (see Section 5).

When your ABM campaign is up and running, put regular follow-up meetings in everyone's calendar, so you can measure success together.



#### TOP TIP

*"Have regular meetings between sales, marketing and CS to agree on a plan for each account and see how you can leverage the knowledge you already have in your team."*

**- Owen Steer, ABM Specialist, Punch**

## 4. Define your ABM goals

If you don't know what your goals are, how will you know when you have achieved success? Giving your ABM team clearly defined goals helps focus their efforts. Think about what you want to accomplish from your new ABM strategy.

Are you using ABM to launch a new product to the market? Perhaps you want to target a new customer segment? Are you looking for new business, or more spend from existing customers?

Use the meetings with your ABM team to agree on the goals of the campaign. Keep the goals in mind as you progress to the next stages.

**TOP TIP**

*"When we go about implementing ABM, it's during the discovery phase that we get together with our sales team, senior and junior, and we drill into their existing sales cycle. We understand the steps and phases that exist, the blockers and objections, the timescales they're working with, what's the buying journey like, how long it takes to convert a typical sale from initial inquiry through to conversion. We need to know those things to set KPIs and goals for the campaign."*

**- Joe Birkedale, CEO, Project36**

## 5. Select the metrics to track

ABM isn't a "quick win" activity. It can take a lot of time before it starts producing results. When you start running an ABM campaign, you'll need to prove to management and the wider business that it's worth the time and expense. The only way you can do this is to monitor your ABM metrics.

While the metrics you track may vary from campaign to campaign, at Cognism we've found that there are some core metrics that you need to keep your eyes on – especially if you're just starting out with ABM.

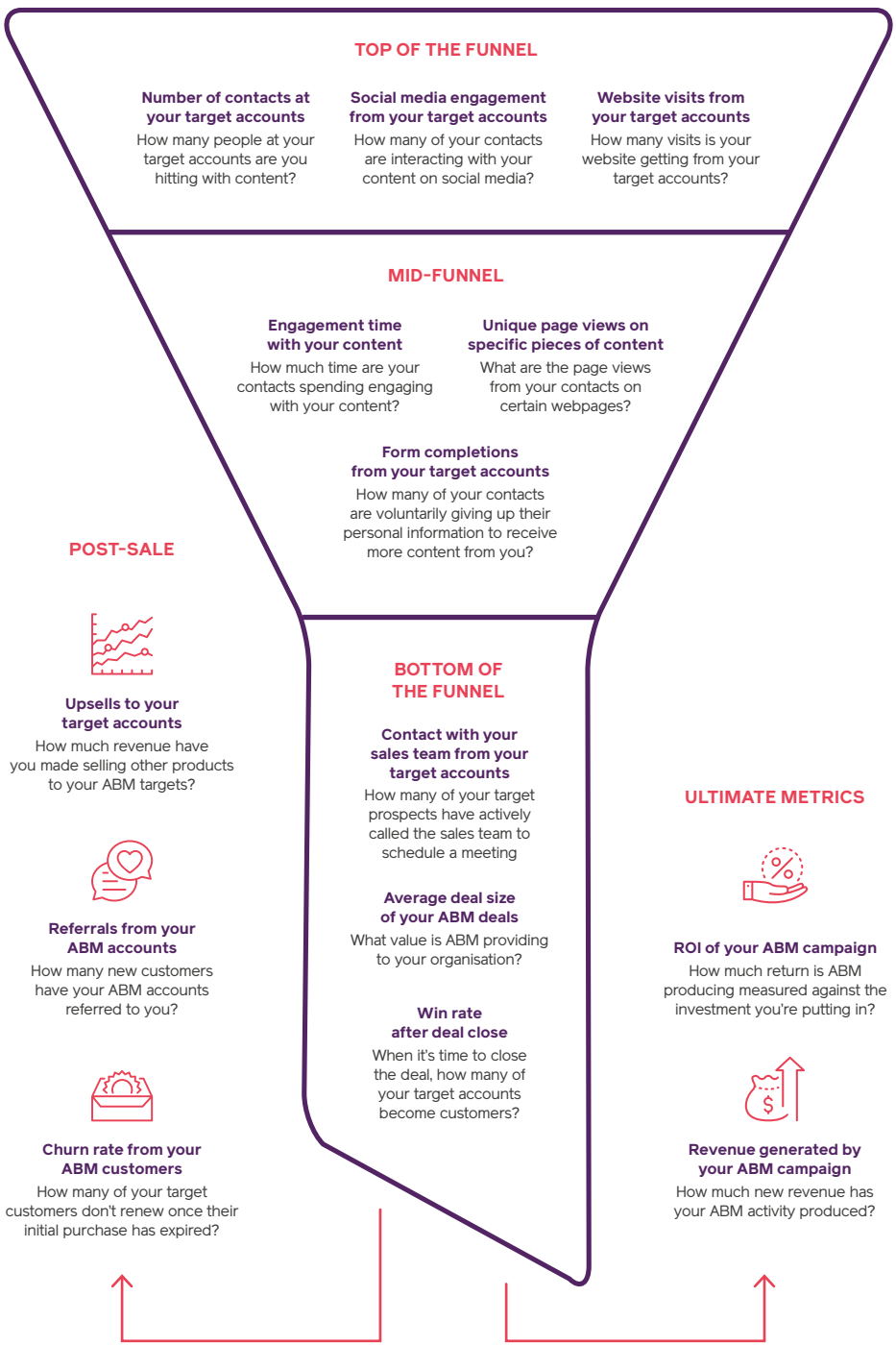
These are the essential metrics to help you get started with ABM.

- ✓ **Agree on the metrics to track** before starting your ABM campaign.
- ✓ **Align sales and marketing** and ensure both teams are fully aware of the metrics they need to monitor.
- ✓ **Be transparent in sharing** the results of your ABM activity as the campaign progresses, so both teams learn together.

**TOP TIP**

*"Moving further up in the funnel than revenue and pipeline, which are the ultimate metrics that we're looking for, the thing that we're really interested in is genuine engagement. You need to understand engagement far more deeply than who clicked what and who downloaded what. The thing that we really look for is who's spending time on what particular parts of what particular document."*

**- Nick Mason, Founder and CEO, Turtl**



## 6. Build your target list

ABM can be an extremely effective way to win bigger deals from more clients in the B2B space. However, it takes a considerable amount of investment, of time and money, for it to work.

For this reason, you need to have a robust plan before you start your ABM operation. You can't run ABM campaigns on an ad hoc basis. Part of your preparation for ABM is building a list of targets. You need to define who you are going to approach before you start.

Follow these steps to help you build your ABM target list.

### Step 1: Create your Ideal Customer Profile (ICP)

ABM requires you to get your sales and marketing teams aligned and working together. Once you've done this, you need to run this exercise - creating a profile of your ideal customer, the type of account you will target with ABM.

Unlike traditional forms of marketing, where the net is cast wide in the hopes of catching large volumes of customers, ABM is all about getting hyper-focused and granular. The key to ABM success lies in identifying a small number of high-profile accounts and targeting them with personalised campaigns.

For this to work, you need an Ideal Customer Profile (ICP).

#### *What is ICP?*

Your ICP is a comprehensive description of your perfect client. It's the kind of customer that finds massive benefits from your product or service, while also being able to give you enough value in return to make your business profitable.

#### *How do you create an ICP?*

Here are the four stages to building your ICP.

#### 1 Identify your super-users

It's likely that your ICP is already a customer of yours. Start by looking at the prospects that convert quickly and your longest-serving customers. Narrow down your customer base until you have a list of 10 super-users - the people who don't just use your product, but the people who love it and get more value out of it than the average user.

#### 2 Interview your super-users

Set up phone calls, Zoom or face-to-face meetings with your 10 super-users. Ask them about their experiences with your product, specifically:



Their buying processes.



Why they purchased.



How they found out about you.



How they're benefitting from your product.

### **3 Analyse the data**

Once you've conducted your interviews and collected the answers, it's time to study the data. Put all the answers together and see what links them. Look for common attributes. Are there any recurring patterns or shared characteristics? The insights you'll gain here are critical for the next step in developing your ICP.

### **4 Create your ICP template**

This final step is where you put it all together. Take all the insights you've gained and build a template of your ideal customer.

Here's an example which we use at Cognism. This has helped us to launch our own ABM campaigns.

**COGNISM IDEAL CUSTOMER PROFILE**



**Industry**

B2B Sales, SaaS



**Geography**

USA



**Company Size**

50 employees



**Budget**

\$10,000/month



**Buying Process**

Reliance on referrals for  
buying decisions



**Decision Makers**

CEO, CRO



**Pain Points**

Generating high-quality C-suite leads  
Automating outbound email campaigns  
Increasing sales team productivity



**Business Goals**

**Short term:** grow their client base  
by 20% over the next 3 months  
**Long term:** raise their next funding  
round and expand their sales team



**Technologies**

Salesforce CRM  
SalesLoft  
Chili Piper



**Attributes**

Primary social media channel = LinkedIn  
Gaining a reputation as SaaS  
industry thought leaders  
Uses ABM strategies

**TOP TIP**

*"You need to be absolutely clear who your Ideal Customer Profile is. This is something every business should do. It's an incredibly useful exercise even outside of ABM. Who are we not selling to at the moment that we could be selling to? That's a good question to ask."*

**- Nick Mason, Founder and CEO, Turtl**

**Step 2: Measure first-party intent**

First-party intent (also called engagement) is information from end-user engagement with your brand. This could take the form of:



Event attendees.



Users who have viewed or downloaded content.



People who have filled out online forms.

At this stage of your list-building, you need to gather all this information together. You're looking for anyone who has directly engaged with your brand.

**TOP TIP**

*"Once you have all the data, study it. Are any of them in a buying window right now? Have they signalled any intent to buy? Add any users with intent to buy to your target list."*

**- Owen Steer, ABM Specialist, Punch**

**Step 3: Measure third-party intent**

If first-party intent is all about people who have directly engaged with your brand, third-party intent is about people who could be interested in your company, but may not know about it yet.

You are looking for people who have engaged and shown interest in your industry or sector. These could be:



People viewing competitor websites.



Users searching for specific terms on search engines.



How can you find these people? First, define a set of keywords that are relevant to your industry. Be careful with these keywords - they must be relevant.

Draw up a list of around 250 keywords. Always double-check your list to make sure the terms you're using aren't bringing in irrelevant search results.



#### TOP TIP

*"Use tools that will find people who are searching online for your keywords. Add these people to your ABM target list. This is a good option for smaller companies with low inbound volume."*

**- Owen Steer, ABM Specialist, Punch**

## Step 4: Order your target list

Now you have a list of people, it's time to put them in the order in which you're going to target them. You can use all three of the methods we've talked about - but be scientific. Don't just go after the biggest or most famous companies - look for targets that are the best fit for your offering.

You should also prioritise the accounts that have a strong intent to buy. Use your alignment meetings to decide which accounts you want to target and the type of ABM you'll need to deploy.



#### TOP TIP

*"ABM is not just multi-channel marketing, it's best practice marketing. But there's more to it than just using multiple channels. It's about treating the accounts you're going after as markets in their own right. There's no better resource for a marketer to learn more about accounts than their own internal sales team and customer success team."*

**- Owen Steer, ABM Specialist, Punch**

## 7. Create personalised content

With ABM, you have to create content that resonates with every individual decision-maker inside your target account. The more personal you can get, the better. Ideally, you want to create one-off content, addressing their specific needs.

Here's how to create personalised content for ABM.

## Step 1: Identify the Decision-Making Unit (DMU)

Once you've developed your ICP, you can use it to inform the next stage – creating lists of the ideal customers you want to target. Then, when you've built your target lists, go even deeper. Identify the Decision-Making Unit (DMU) inside your target company. The DMU is a group of people who have influence over purchasing decisions.

ABM is a highly-personalised play – you'll need granular intelligence on every member of the DMU. Find out everything you can about them. Connect with them on LinkedIn. Conduct online research.

Think about the messaging that would make an impression on them – individually, not collectively. What are the motivating factors for everyone who would have an input into purchasing your product? How can you reach them with the kind of messaging that will make them want to buy?

## Step 2: Define their pain points

Work out individual pain points for everyone in the DMU. For example – are they looking to reduce costs? Save time? Grow their sales? Streamline their existing processes?

Interview the salespeople who are interacting with the DMU. Sales reps work at the coalface of business every day and the information they pick up during their qualification and discovery calls can be invaluable to the account-based marketer. Use their insights to define the prospects' pain points – and then use the pain points to inspire and influence the content you'll create.

## Step 3: Choose the right medium

On average, there are 7 to 8 influencers involved in every business decision. Each influencer is different, so it stands to reason that they will all respond to content in different ways. Some people respond better to different types of content than others.

And in today's modern marketing world, there is a wide range of content types to choose from. Popular formats include:



Blogs



Videos



Case studies



Whitepapers and guides



Webinars



Podcasts



Letters and direct mail



Templates



Checklists



Reports

With so many options available, how can you be certain you're choosing the right one?

Again, ask your sales team. They'll know from experience what resonates most with different types of buyers. Aligning marketing with sales is the surest route to achieving success with ABM.

#### Step 4: Select the right channels

Just as important as knowing what types of content to produce is knowing where to promote them. Go back to your ICP – where are your targets spending their time online? What social media channels do they most often engage with?

Do your research. Check your own social media channels and email campaigns. Where are you seeing engagement from your target accounts and others like them? Study your data and make decisions based on it.

When activating your content, tailor and customise your messaging for each prospect. Personalisation is the key to ABM engagement.

#### Step 5: Timing is everything

Successful ABM campaigns contain multiple steps, involving numerous channels and content types.

The more senior the decision-maker, the shorter your content must be in the first step. Senior decision-makers will have no time in their day to consume long-form content. It's only later, at the decision stage of the buyer's journey, that they'll have time for long content. Build up to that point by delivering smaller pieces of content at regular intervals.



#### TOP TIP

*"Personalisation is the difference between ABM working or not working. But the personalisation has to be meaningful. It really comes down to who you're going after, in terms of the type of business sector they're in, the type of person you're looking for, and that will help you determine which tactics to use."*

**- Nick Mason, Founder and CEO, Turtl**



#### TOP TIP

*"Keep the engagement going. You need to provide the prospect with valuable content at every stage of their journey with your brand."*

**- Joe Birkedale, CEO, Project36**

## 8. Launch your ABM campaign


















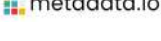





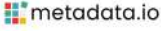











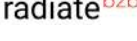



Preparation over. It's time to get ABMing! Start distributing the content you've created to the people you have chosen.

When your content is being sent out, ask your sales reps to start making inroads into your target accounts. Make calls, set up meetings and demos. If your content is good and well-dispersed, your buyers will already know who you are. You know the interest they have in your product. You see the solution you provide for them. It's time to move them through your customer journey.

### What tech can improve my ABM campaign?

You can use technology to enhance the effectiveness of your ABM campaign; it's not essential, but it can help!

Here is a list of technologies you can use to implement ABM:

INTELLIGENCE	MANAGEMENT	EXECUTION	REPORTING
 Cognism	 Cognism	 Turtl	 Google Analytics
 Marketo	 LinkedIn	 Sendoso	 Adobe Analytics
 adapt	 vidyard	 terminus	 LeanData
 InsideView	 zoom	 Engagio	 Marketo
 act-on	 agora pulse	 DEMANDBASE	 terminus
 infer	 HubSpot	 metadata.io	 Engagio
 TechTarget Priority Engine	 LinkedIn Marketing Solutions	 sense	 bizible
 RollWorks	 Marketo	 alyce	 metadata.io
 EVERSTRING	 groove	 Printfection	 DEMANDBASE
 bombora	 CONNECT LEADER	 Überflip	 sense
 PipeCandy	 OPENPRISE	 ON24	 Triblio
 JABMO	 Full Circle INSIGHTS	 Sigstr	 radiate b2b
 Kwanzoo	 LIFT IQ	 Hushly	

**TOP TIP**

*"You can absolutely do ABM without technology. Don't rush into making decisions for a tech stack when you're trying to learn and implement ABM."*

**- Owen Steer, ABM Specialist, Punch**

## How can I tell what tech is best for me?

The ABM industry is booming; currently it has the **highest return on investment** of any B2B marketing tactic. There are a wealth of agencies and tools out there that promise to take your ABM campaigns to the next level. But, with so much choice available, it's harder than ever to pick the right one for your business.

We asked **Joe Birkedale**, founder and CEO of **Project36**, and **Owen Steer**, ABM Specialist at **Punch**, for their advice. As seasoned marketers with a record of delivering complex ABM strategies for their clients, they are uniquely placed to offer their insights into the top 10 questions you need to ask your ABM vendor. Their tips will help you when it comes to defining your ABM goals and making a sensible buying decision.

### 1. "What does success or failure look like?"

**JOE SAID:**

*"Asking this question first of all is a very good option! Before you start with ABM, you need to determine what you're looking to get out of it. What's your perfect end result? What are you hoping to achieve? Bear in mind that ABM is not a silver bullet. It normally takes a lot of time and effort before you see success. A good ABM vendor will seek to outline the end goal first, then describe the steps you need to take to get there."*

## 2. "What metrics will you be tracking?"



### OWEN SAID:

*"You definitely need to set the correct KPIs before you launch an ABM campaign. All stakeholders need to be fully aligned on these metrics. Think about the following: what does success look like? Who is responsible for achieving these metrics? Who and how will you be measuring results?"*

*"This conversation should involve marketing, sales, customer success, and of course, your ABM vendor."*

*"Remember that ABM is a long-term initiative, so you may have to agree on short-term metrics that showcase early signs of success, while you wait for the long-term benefits to kick in."*

## 3. "How many accounts can you realistically target?"



### JOE SAID:

*"You need to be realistic with what ABM can achieve, what you can handle and how far your budgets can reach. Start small, always. Prove the model and then scale. If you scale up too soon, you'll drown in data and the campaign will stumble."*

*"Most clients aim for 1-to-Few ABM, which is typically 20 accounts with approximately 5 decision-makers in each."*

## 4. "Of those accounts, which ones would be best to target?"



### OWEN SAID:

*"Committing to ABM means focusing your resources on accounts that have a higher propensity of converting into business. Best-practice account selection is absolutely vital to ensure you're mitigating the inherent risk of targeting fewer accounts."*

*"At Punch, we start by drilling down into a client's data and building an Ideal Customer Profile (ICP). We use this ICP to develop a list of accounts that are a good fit for your proposition. This is called your Total Addressable Market (TAM)."*

*"Once you have your TAM, it's time to use intent data to identify which accounts are showing the best signals for having a need or entering a buying window. The accounts that are showing the highest intent to buy are the accounts that you need to prioritise with ABM!"*

## 5. "How much will it cost?"



### JOE SAID:

*"It's vital to stress that ABM is a long-term strategy. It's best placed to work with complex services or solutions that have a high degree of customisation, high cost and typically long implementation timescales."*

*"ABM is not usually suitable for high-volume, low-value products or services. Expect the costs to reflect the volume of research, data, insight, strategy and the playbook the campaign requires."*

## 6. "How quickly can I expect to see ROI?"



### OWEN SAID:

*"Similar to question 5, this question is all about managing expectations. ABM isn't a short-term cash grab. It's good to get everyone thinking long-term. You have to set yourself realistic expectations around achieving ROI. For example, if your current sales cycle is 12 months then you shouldn't come into ABM expecting to win business within the first 6 months. That doesn't mean you won't, though!"*

## 7. "How long will the campaign take?"



### JOE SAID:

*"The answer is - it will vary dramatically based on the product, service or solution being offered. Look at your existing sales cycle. If, for example, it normally takes 12 months from enquiry to order, then expect something broadly similar."*

*"ABM should have numerous KPIs for tracking success. Time to first order can be one of those metrics and ABM can shorten the sales cycle, but it will need time to run before it can be evolved and tweaked."*



## 8. "How will you manage communications with our sales team?"



### OWEN SAID:

*"Although the conversation to develop an ABM programme tends to start with marketing, the first topic of conversation is always the most effective way to align with sales."*

*"Here at Punch, we invite sales, customer success and marketing to attend a series of strategic workshops during the setup process. This ensures that all stakeholders are aligned."*

*"Fast-forward to campaign execution and we'll put in the diary weekly catch-ups about how well the campaign is going, and monthly reviews where we can share insights and ideas for improvement."*

## 9. "What systems/tech will you use?"



### JOE SAID:

*"ABM doesn't need a sophisticated tech stack. A spreadsheet and good data are really all you need at the start. My advice to my clients is: don't go mad on the tech! As an ABM agency, we often spend a lot of time unpicking our customers' tech stacks. They can become overly complex and convoluted, and can actually slow you down in the early stages. Get your ABM campaigning right from an operational level first, then add in tech later."*

## 10. "How long will the setup take?"



### OWEN SAID:

*"I always say that ABM is 80% setup, 20% execution. There are no strict guidelines for how long it takes to work through the strategic setup of your ABM programme...but you will notice that due diligence in getting the setup right in the beginning will be reflected in your success."*












## 9. Track ABM engagement

When your ABM campaign is up and running, you can't just sit back and relax. ABM's guiding principle is to build and maintain deep and meaningful relationships with your target accounts.

To measure success in growing those relationships, you'll have to track engagement.

### What is ABM engagement?

ABM engagement is any interaction a prospect has with your ABM activity. There are two types of engagement:







DIGITAL ENGAGEMENT	PHYSICAL ENGAGEMENT
<p>This includes any online interactions from your prospects. For example:</p> <ul style="list-style-type: none"><li> Opening an email</li><li> Visiting your website</li><li> Downloading a piece of content</li><li> Reading a piece of content</li><li> Filling out a survey or form</li><li> Signing up to a newsletter or mailing list</li></ul>	<p>This includes all real-world interactions from your prospects. For example:</p> <ul style="list-style-type: none"><li> Onsite visits or event attendance</li><li> Phone calls</li><li> Direct mail</li><li> SMS</li><li> Demo attendance</li></ul>

How to track ABM engagement

At Cognism, we regularly help our customers to run targeted ABM campaigns. We encourage them to track the engagement they have with their prospects by using the following template:

ABM TEMPLATE FOR TRACKING ENGAGEMENT					
Activity Date	Prospect Name	Prospect Title	Account Name	Engagement Type	Engagement Score

KEY

	Activity Date	The date on which each engagement happened
	Prospect Name	The prospect's full name
	Prospect Title	The prospect's job title (e.g., Director, Manager, CEO)
	Account Name	The prospect's company
	Engagement Type	The type of engagement (e.g., prospecting call, scheduled demo, event attendance)
	Engagement Score	Give each engagement a mark out of ten, based on the value generated from the engagement

We've found this template to be a useful way of tracking ABM engagement over time. Not only does it list each engagement on a day-by-day basis, but it also shows how each interaction feeds into the success of the entire campaign.

**TOP TIP #1**

Our advice is to keep your eye on the engagement score. Before you start your ABM campaign, define your goals and set engagement scores against each goal.

For example, a prospect answering an email could be a score of 5, while booking a demo could be a score of 8. Add up all the engagement scores to see how well each campaign is doing in relation to others.

**TOP TIP #2**

Another quick trick is to track your engagement scores in Excel or Google Sheets. There's no need to shell out on expensive reporting solutions when you're just starting with ABM.

**What can I do with this data?**

The insights you'll gain from measuring engagement can be invaluable to the continued success of your ABM efforts. Here are some questions to get you thinking:

***Are certain days of the week more popular for engagement than others?***

Do you find that you get a higher number of engagements on certain days than others? Are certain engagement types more popular on specific days?

The answers to these questions will tell you when are the best times for launching your ABM activities. They'll inform your ABM campaign schedule and help you to maximise engagement from your prospects.

***How do individual prospects engage with your company?***

As we've said, ABM works when it's highly-personalised and relevant to each prospect. Look out for patterns in their behaviour. Do they engage with certain channels but not others? Do they usually respond at certain times of the day? Are there particular messages or engagement types that they respond best to?

**TOP TIP #3**

Use the information to get even more personalised. Double down on what works and build a campaign that's laser-focused on the prospect and his or her needs.



### **How well are each engagement types performing?**

ABM is a multi-channel undertaking. You have to interact regularly with your potential buyers across a number of different channels and media. It's the only way to keep that meaningful relationship going.

#### **TOP TIP #4**

Find out which engagement types work best for each prospect. Then you'll know which engagement types you need to concentrate on. Use the template we've provided above to keep track of this.



### **The secret of ABM engagement**

ABM engagement is about time. It's the same with any purchasing decision you make in any walk of life - the more time you spend in a shop, for instance, the more likely you are to buy something. So it is with B2B buyers. The more time they spend interacting with your company, the more interest they're showing in buying from you.

Tracking engagement is the vital first step in measuring the success of ABM. It's simple to understand, easy to track, and can give you some useful insights early on. Simplify the process even further by making use of our tracking template.



#### **TOP TIP**

*"As campaigns are going, part of the alignment process needs to be making sure that any insights and information regarding genuine engagement are filtered down to sales. Make sure that those real-time metrics are being transparently shared across the company so that you're making the most of what you're learning."*

**- Owen Steer, ABM Specialist, Punch**

## 10. Evaluate and iterate

Starting with ABM can be a trial and error process. However, one of the best things about ABM is that it creates a great deal of data. Study your data while your campaign is live. If you're using tech, then take a look at its reporting functions or features.

If you're running ABM tech-free, then monitor engagement rates, especially digital engagement. You'll be able to tell after a short while what kinds of messages are resonating and what are not.

Also, keep up with your sales alignment meetings! Ask your sales reps what lines of enquiry are working better than others. If something is working well, double down on it. If something else is failing, switch it out. Use A/B testing to hone your ABM strategy to perfection.



### TOP TIP

*"However long your stages of delivery for ABM are, the final step should be: measure, learn, optimise and repeat. It's not a set and forget program. ABM is a living, breathing thing, so it will change. It takes time. If you want revenue tomorrow, ABM is not the program for you."*

**- Joe Birkedale, CEO, Project36**

## ABM: does it work?

Guides are all well and good; but does ABM actually work in practice? We can tell you that it does! Here's a recent example that produced outstanding results.

### The cupcake campaign



**Cognism** uses **Reachdesk** across our entire commercial team, from SDRs sending personalised notes to open doors, sales reps delivering content and gift boxes to accelerate deals and customer success sending cupcakes to leads who were ghosting.

The cupcake campaign was a perfect illustration of ABM in action. It was an account-based campaign, starting with a list of target buyers and the messaging which resonated with each of them. The cupcakes were delivered and the outcome was exceptional - response rates were 80% when the campaign target was 20%!

### Will ABM work for me?

Our advice is simply: you won't know until you try! Follow the steps we've outlined and always measure the results as you go. Share your successes with us - you can reach us on the following social media platforms:



Also, be sure to bookmark the **Cognism blog**! We'll be sharing more ABM knowledge throughout 2020. See you there!

## Contact Cognism today

Did you know that Cognism is the perfect choice for the account-based B2B marketer? Using our platform, you can:

- Develop personas of your ideal customers and quickly build target lists of B2B leads.
- Drill down into your target accounts and discover an accurate list of decision-makers and their contact details.
- Deploy highly-focused, multi-step and automated outbound campaigns to engage and follow-up with them.

Want to see our all-in-one B2B prospecting solution in action? Register for your free demo today!



**Request your demo now**





Cognism 

# **B2B TECHNOLOGY:**

Tools to power your  
lead generation

# Contents

What is a B2B technology stack?

150

What are the benefits of a B2B technology stack?

150

The ultimate B2B technology stack

154

How to buy tech the right way

183

Optimising your B2B technology stack

185

## What is a B2B technology stack?

A B2B technology stack or “tech stack” is a term for the sum total of software and applications used by a B2B company. The term has grown in relevance due to the recent explosion in the number of tech and SaaS (software as a service) companies, especially in the B2B sector.

As a result of this tech expansion, most B2B organisations now have budget earmarked specifically for technology. Behind every successful sales or marketing team is a suite of tools and platforms designed to optimise or accelerate their tasks. A good, well-managed B2B technology stack is the foundation on which your entire business can be built.

## What are the benefits of a B2B technology stack?

### For sales

An effective B2B technology stack can bring several benefits to your sales team. Here are five of the most essential:



#### 1. Generating leads and closing deals

Lead generation is the most crucial activity any salesperson can engage in. New business is the lifeblood of any organisation and winning customers relies on a smooth-running lead generation process. Nowadays, technology can assist with this process, enabling the sales rep to source thousands of verified prospects, their names and contact details, at the simple click of a button.

Just as technology can help at the start of the sales cycle, so it can provide value at the end. Technology can aid the sales rep when it comes to closing deals, speeding up the process so that they can quickly move on and engage with new leads.



#### 2. Increasing productivity

One major benefit of a good B2B tech stack is that it frees up time for a sales team. By automating time-consuming or laborious tasks, the best sales technology gives time back to the user.

One good example of this is lead generation, as discussed above. It's estimated that up to **22%** of a sales rep's time is spent generating leads, be that prospecting (cold calling, sales emails and appointment setting) or researching (searching for target accounts and building contact lists). Technology now exists that can run these lead generation activities with minimal input. Consequently, sales reps are rewarded with more time – time that can be put to good use in engaging with prospects and closing deals.



### 3. Faster problem solving

Having a good B2B tech stack can make problem-solving easier and faster. Certain types of sales tech can provide accurate, real-time metrics on a granular level. As a result, a tech stack allows salespeople to quickly identify problems in their sales process and make adjustments.

An efficient B2B technology stack will provide you with status reports at every stage of the sales process. The data will show you where the difficulties are, giving you the impetus to change your process or try out new courses of action.



### 4. Improved forecasting and analytics

Before the B2B technology revolution, sales forecasting and analysis was conducted by teams of business analysts. Despite their best efforts, the results were often incorrect or incomplete. Information was often clunky (every sales team leader of a certain age knows the horror of a thousand-row Excel spreadsheet). No fault of theirs, of course - they did their best with the technology available to them - but like all business tasks performed by humans, it was subject to the whims of human error.

Nowadays, sales technology can provide meticulous and precise forecasting and analysis. AI technology, for example, can analyse vast quantities of data, at a much faster rate than any human can. This leads to improved reporting and forecasting. The upshot of this is that the instant availability of accurate data empowers sales managers to make better decisions. If your B2B tech stack is predicting that revenue will be down next quarter, then you'll know exactly where to focus manpower and resources going forward.

The best B2B sales tech stacks should also create a feedback loop. As more data is fed into the system, it leads to better reporting and better results...which in turn leads to more data being fed into the system, which leads to better reporting and better results...ad infinitum!



### 5. Greater flexibility

B2B technology stacks shouldn't be static; they should evolve as your company grows or your goals change. Big sales teams will need a different tech stack compared to small sales teams. Your technology must be able to evolve, based on your company's needs.

The most efficient tech stacks will provide flexibility for your B2B sales team. Look for tools that can easily integrate with your CRM. Seamless integrations equal a seamless working experience for your team.

## For marketing

There are several advantages that an efficient B2B technology stack can deliver to a marketing team. Here are five of the top tech benefits for B2B marketing:



### 1. SEO and keyword research

Search Engine Optimisation (SEO) is the practice of increasing traffic to your website from organic search engine results. It's a key pillar of any B2B marketing strategy, as it serves to promote your brand and delivers those all-important inbound leads to your website.

There are a plethora of tools available which can help B2B marketers to optimise their websites for SEO. One important area where tech assists is keyword research - the activity of finding the search terms that people type into search engines. Technology exists which allows B2B marketers to source the most relevant keywords for their business, and see how their competitors are ranking for those keywords.



### 2. Planning and communication

The days of B2B marketers launching campaigns without preparation and working in silos are long gone. Many platforms now exist which empower marketers to plan out their work in detail before the hard graft begins. The upshot of such technology is greater productivity and more successful, targeted and focused marketing activity.

As well as planning, technology has also revolutionised the ways that marketing teams communicate with each other. From file storage services to collaboration software and project management platforms, there are many new tools that make the day-to-day business of marketing easier and more efficient.



### 3. Content creation

Content marketing is a growing facet of the B2B marketing mix. As the discipline has expanded, so too has the variety of software available to B2B content marketers. Some of the earliest examples of content tech were blogging platforms and content management systems, but as of today, a great many more applications have hit the market.

Today's B2B content marketer can utilise tools in areas as diverse as website creation, video production, infographic design, webinar and podcast recording and blogging and writing assistants. Expect even more innovations in this field as the popularity of content marketing increases.



#### 4. Connecting and engaging

Creating content is one thing; sharing it and promoting it is quite another! Luckily, this is an area of B2B marketing which is blessed by an abundance of useful tech. Social media management platforms are hugely popular and allow B2B marketers to activate their content and share it with a global audience of prospects and customers.

Online advertising is another sector that has been transformed by technology. If you're looking to manage your digital advertising campaigns across platforms, then there are several choices available to you. All have slightly different USPs but all promise to make online advertising faster and easier to control.



#### 5. Tracking and measuring

Just as in B2B sales, the analytics revolution has occurred across B2B marketing. Almost every marketing activity can be tracked and measured, practically in real-time. With analytics tools, the modern B2B marketer can scrutinise metrics for all the major marketing channels, from company websites and social media to online ads and email marketing campaigns.

The primary benefit of this technology in B2B marketing is that it empowers marketers to evaluate their work and learn from it, helping them to make better data-driven decisions.

# The ultimate B2B technology stack

## For sales

**Jonathon Ilett** is Cognism's Sales Director. He has drawn up a list of the very best sales tech providers, impacting every stage of the sales cycle. This is a sales tech stack optimised for scaling companies, lead generation and growth.

Cognism 



## Prospect

### Sales Intelligence

Cognism 

#### Cognism

Cognism is the world's leading all-in-one globally compliant prospecting solution. Its innovative solutions help businesses find and deliver new revenue, faster.

[Visit site](#)

**LinkedIn**  
SALES NAVIGATOR

#### LinkedIn Sales Navigator

LinkedIn Sales Navigator is the best version of LinkedIn for salespeople. Establish and grow relationships with prospects and customers on LinkedIn.

[Visit site](#)

## Visitor Identification

**LEAD FORENSICS**

#### Lead Forensics

Lead Forensics is the software that reveals the identity of your anonymous website traffic, and turns them into actionable sales leads.

[Visit site](#)



**Leadfeeder**

Leadfeeder shows you the companies visiting your website, how they found you and what they're interested in.

[Visit site](#)

**Connect**

**Sales Engagement**

---



**Outreach**

The market-leading sales engagement platform. Outreach helps salespeople to effectively engage with prospects to drive more pipeline and close more deals.

[Visit site](#)



**SalesLoft**

SalesLoft helps top-performing sales teams transform the way they sell. Generate pipeline, manage deals and engage customers.

[Visit site](#)



**Salesforce Engage**

Marketing automation for sales. Effortlessly build tailored campaigns with marketing-curated content and close deals faster.

[Visit site](#)



**Groove**

Groove helps managers, reps, and operations sell smarter and increase revenue. Engage top accounts with smart account-based sales features.

[Visit site](#)



## Online Appointment Scheduling

---



### Chili Piper

Chili Piper helps qualified leads automatically book a meeting or start a phone call right after they fill out a form.

[Visit site](#)



### Doodle

The world's leader in online scheduling, Doodle is the most powerful way to schedule meetings with clients, colleagues, and teams.

[Visit site](#)



### Calendly

A powerful yet simple automated scheduling tool. Calendly takes the work out of connecting with others so you can accomplish more.

[Visit site](#)

## Research

## CRM

---



### Salesforce CRM

The world's number one CRM. Salesforce is an integrated platform that gives all your departments a single, shared view of every customer.

[Visit site](#)



### HubSpot CRM

Free and easy to learn, HubSpot CRM helps companies of all sizes track and nurture leads and analyse business metrics.

[Visit site](#)



### **Microsoft Dynamics 365**

A CRM solution that drives sales productivity through social insights, business intelligence and campaign management.

[Visit site](#)



### **Pipedrive**

A sales management tool for small teams with big ambitions. Pipedrive visualises your sales pipeline and makes sure important activities and conversations won't get dropped.

[Visit site](#)



### **Workbooks**

Drive business success with Workbooks CRM - an affordable, feature-rich CRM solution that enables businesses to acquire, convert and retain new customers.

[Visit site](#)

## **Market Intelligence**

---



### **DueDil**

DueDil helps companies find opportunities and mitigate risks, by providing private company information on over 40 million businesses.

[Visit site](#)



### **InsideView**

Discover new markets, target and engage the right buyers, and manage customer data quality.

[Visit site](#)



### **PitchBook**

PitchBook provides comprehensive data on the private and public markets to help business professionals discover and execute top opportunities.

[Visit site](#)

---

## crunchbase

### Crunchbase

The leading destination for company insights from early-stage startups to the Fortune 1000. Find information about public and private companies.

[Visit site](#)

---

## Present

### Video Conferencing

---



### Zoom

The leader in modern enterprise video communications. Build relationships with prospects and customers and close business faster with Zoom.

[Visit site](#)

---



### Skype

Skype's group video chat makes it easy for coworkers to meet and collaborate. With group screen sharing, you can present PowerPoint slides, video recordings and more.

[Visit site](#)

---



### GoToMeeting

An industry leader in online video conferencing for companies around the world, GoToMeeting is trusted by millions of people everyday for real-time communication.

[Visit site](#)

---



### BlueJeans

BlueJeans is the meeting platform for the modern workplace. It brings video, audio and web conferencing together with the collaboration tools people use every day.

[Visit site](#)

---

## Video Hosting

---



### **Vidyard**

Vidyard is an online video platform for business. It allows you to increase leads, accelerate your pipeline and delight your customers.

[Visit site](#)

---



### **BombBomb**

Cloud-based video messaging platform integrated with Gmail, Outlook, Salesforce, iMessage, and 50+ other integration partners.

[Visit site](#)

---



### **Covideo**

With Covideo, you can record and send personalized videos that improve response rates, increase sales opportunities and close more deals.

[Visit site](#)

---



### **Bonjoro**

Integrate Bonjoro with your existing CRM workflows to send truly personal videos at just the right moments in the customer's journey.

[Visit site](#)

---

## Live Chat

---



### Acquire

Streamline customer conversations for sales, support and onboarding. Acquire is a scalable suite of tools including live chat, chatbot, video and voice calling.

[Visit site](#)

---



### Intercom

Build better customer relationships with scalable messaging that provides a more personal experience for you and your customers throughout their lifecycle.

[Visit site](#)

---



### Zendesk Chat

Zendesk Chat lets you chat with customers on your website and give them real-time support.

[Visit site](#)

---



### Drift

Drift is the world's leading conversational marketing and sales platform that helps businesses connect with customers who are ready to buy.

[Visit site](#)

---

Close

Proposal Software

---



**PandaDoc**

Create, send, track, and eSign proposals, contracts, and quotes. Empower your sales team to create professional documents faster, streamlining the closing process.

[Visit site](#)

---



**Proposify**

The online proposal software that helps modern sales teams create, send, track, and e-sign winning proposals, contracts, and agreements.

[Visit site](#)

---



**Qwilr**

Qwilr makes beautiful, intuitive sales and marketing documents that look impressive and integrate seamlessly with your business.

[Visit site](#)

---



**DocSend**

DocSend helps sales and marketing teams find and share the content that drives deals forward. Say goodbye to attachments, and hello to more revenue.

[Visit site](#)

---

## Contract Management Software

---



### Juro

AI-enabled end-to-end contract management software. Juro offers contract creation, negotiation, e-signing and analytics.

[Visit site](#)



### Oneflow

Oneflow offers a powerful sales tool that automates the last mile of the selling process. It speeds up the sales cycle by making it easy for the prospect to sign from any device.

[Visit site](#)



### ContractWorks

A contract management software for teams of all sizes. Execute, store, track and get the most out of your contract portfolio.

[Visit site](#)

## E-Signature Software

---



### DocuSign

A cloud-based solution that offers a way to sign agreements electronically on practically any device, from almost anywhere, at any time.

[Visit site](#)



### HelloSign

HelloSign is the easiest way to send, receive and manage legally binding signatures for businesses of any size.

[Visit site](#)



**Adobe Sign**

Automate signing and approvals across your entire organisation. Reduce the signing and approval process from days to minutes with Adobe Sign.

[Visit site](#)

---

**Sales Enablement**

---



**GetAccept**

Harness video, live chat, proposal design, document tracking, and e-signature to simplify the life of your B2B sales team.

[Visit site](#)



**Highspot**

Highspot's intuitive platform combines intelligent content management, training, contextual guidance, customer engagement, and actionable analytics.

[Visit site](#)



**Seismic**

The leading B2B sales enablement platform. Seismic equips global sales teams with knowledge, messaging, and automatically personalised content.

[Visit site](#)



**Showpad Content**

Showpad Content bridges the gap between sales and marketing by creating a centralised location that lets sellers discover, present and share the latest, on-brand content.

[Visit site](#)

---



## Analyse

### Sales Analytics

---



#### **Kluster Intelligence**

Kluster Intelligence interprets CRM data to produce innovative insights and action-points, designed to drive growth and profits.

[Visit site](#)

---



#### **SalesChoice**

An AI SaaS-based predictive and prescriptive analytics company that increases the performance of B2B sales.

[Visit site](#)

---



#### **Clari**

Clari's Revenue Operations platform helps B2B organisations increase win rates, shorten sales cycles and improve forecast accuracy.

[Visit site](#)

---



#### **Salesforce Sales Analytics**

Quickly gain pipeline visibility, track team performance, and uncover opportunities to grow your business.

[Visit site](#)

---



#### **Oracle Sales Analytics**

Oracle Sales Analytics provides hundreds of key performance indicators and more than 130 reports in five customisable dashboards.

[Visit site](#)

---

## Business Intelligence

---



### InsightSquared

AI-powered revenue intelligence software. Make better business decisions with actionable, real-time intelligence on sales KPIs.

[Visit site](#)

---



### Looker

Looker is a business intelligence software and big data analytics platform that helps you explore, analyse and share real-time business analytics easily.

[Visit site](#)

---



### Microsoft Power BI

Turn data into opportunity with Microsoft Power BI's data visualisation tools. Drive better business decisions by analysing your enterprise data for insights.

[Visit site](#)

---



### Grow

The business intelligence dashboard for small and medium-sized businesses. Grow makes it easy and affordable to visualise your business performance in real time.

[Visit site](#)

---



### IBM Cognos Analytics

An AI-fueled business intelligence platform that supports the entire analytics cycle, from discovery to operationalisation.

[Visit site](#)

---

## Lead Scoring

---



### **Cyance**

Cyance uses machine learning technology to predict when customers are ready to buy, transforming sales and marketing results.

[Visit site](#)

---



### **Velocify Lead Manager**

Velocify helps sales teams prospect with more precision, accelerate lead engagement, and implement optimised workflows.

[Visit site](#)

---



### **VanillaSoft**

Used standalone, or in combination with existing traditional CRM systems, VanillaSoft empowers sales reps to respond to new leads within seconds.

[Visit site](#)

---



### **Infer**

Infer's predictive lead scoring platform leverages the power of predictive analytics and big data to help you identify who your perfect buyers are.

[Visit site](#)

---



Cognism 

## For marketing

**Alice de Courcy**, Head of Marketing at Cognism, has put together a list of the very best martech tools available right now, applicable to every stage of the marketing funnel. This is the ultimate B2B marketing tech stack for growth and scaling.

### Plan

#### Project Management

---



##### Trello

Organise and prioritise your marketing projects in a fun, flexible, and rewarding way.

[Visit site](#)

---



##### Todoist

A simple yet powerful to-do list app that can help anyone get organised and complete projects on time.

[Visit site](#)

---



##### CoSchedule

A family of agile marketing products to help you stay focused, deliver projects on time, and organise all your projects in one place.

[Visit site](#)

---

## Drafting and Delivery

---



**grammarly**

### Grammarly

Grammarly makes sure everything you type is easy to read and mistake-free. Fix complex grammar and spelling errors and improve the accuracy of your copy.

[Visit site](#)

---



**Adobe  
Illustrator**

### Adobe Illustrator

Create digital graphics, illustrations, and typography for all kinds of media: print, web, interactive, video, and mobile.

[Visit site](#)

---



**lumen5**

### Lumen5

A video creation platform that enables anyone without training or experience to easily create engaging video content within minutes. Includes a free plan.

[Visit site](#)

---



### Canva

An amazingly simple (and free!) graphic design tool. Used by non-designers and professionals alike, it provides tools for both web and print media design.

[Visit site](#)

---



**PIKTOCHART**

### Piktochart

Create impactful infographics, presentations and print designs for free.

[Visit site](#)

---



### Phrasee

Phrasee is an AI that writes better subject lines, Facebook ads and push messages than humans.

[Visit site](#)

---

Productivity and Communication

---



**Slack**

Slack gives you one central place to direct marketing efforts, define campaign deliverables and share results.

[Visit site](#)

---



**Skype**

Cost-effective and collaborative tools for businesses of any size. Collaborate with anyone, anywhere, on any device.

[Visit site](#)

---



**Zoom**

Zoom unifies cloud video conferencing, simple online meetings, and group messaging into one easy-to-use platform.

[Visit site](#)

---



**WeTransfer**

An online file-transferring platform for sending large files to any email address. No hassle, no stress, no charge!

[Visit site](#)

---



**Google Drive**

Safely store all of your company's data in one place. Access files easily from desktop and mobile devices and control how your team shares them.

[Visit site](#)

---



**Zapier**

Connect the apps you use everyday to automate your work and be more productive. Zapier supports over 1,500 apps.

[Visit site](#)

---

## Attract

### Social Media

---



#### Hootsuite

Hootsuite is the world's most widely used social media management platform, designed for organisations to execute social media strategies across multiple social media networks.

[Visit site](#)

---



#### AgoraPulse

A simple and affordable social media management tool. Schedule your content, get reports, and engage followers from one easy-to-use dashboard.

[Visit site](#)

---



#### Buffer

Social media management software for growing brands. Buffer provides a range of pricing plans, including a free option.

[Visit site](#)

---



#### Khoros Marketing

Engage customers with meaningful social media marketing campaigns that foster affinity and accelerate sales.

[Visit site](#)

---



#### CrowdControlHQ

The social media platform that helps you engage your audience, manage your activity and analyse your performance.

[Visit site](#)

---

## Digital Advertising

---



### Google Ads

Advertise with Google Ads to boost website traffic and sales. Easily manage your campaigns and budget.

[Visit site](#)

---



### AdHawk

Make digital advertising easy with frictionless optimisation and cross-platform reporting.

[Visit site](#)

---



### AdRoll

The AdRoll Growth Platform helps over 37,000 brands grow their revenue through seamless marketing and ads.

[Visit site](#)

---



### LinkedIn Marketing Solutions

Build your presence, establish relationships and reach the people that matter most on LinkedIn.

[Visit site](#)

---



### SEMrush

The all-in-one digital marketing toolkit. It offers solutions for SEO, PPC, content, social media and competitive research.

[Visit site](#)

---



### PPC Protect

An award-winning automated software designed to prevent click fraud and protect your PPC campaigns.

[Visit site](#)

---



**Adzooma**

Manage and optimise Google and Facebook Ads faster and gain a competitive advantage with Adzooma's digital advertising platform.

[Visit site](#)

**G2**

G2 helps businesses discover, buy, and manage the technology they need to reach their full potential.

[Visit site](#)

**Capterra**

An online peer review site that aims to help B2B buyers find software solutions for almost every business process.

[Visit site](#)

**ABM**

---

**Cognism**

Boost your ABM strategy with fresh and accurate B2B data. Build personas of decision-makers in your target accounts and distribute your content with Cognism's email automation solution.

[Visit site](#)

**Terminus ABM Platform**

An end-to-end account-based marketing platform. Built to help B2B marketing and sales teams drive more quality revenue through account-based practices.

[Visit site](#)



#### **Sendoso**

Execute online and offline outreach campaigns with Sendoso. Source, store, ship and track ROI for anything you ever need to send.

[Visit site](#)

---



#### **Engagio ABM Platform**

Engagio ABM Platform enables B2B marketers to successfully execute and measure account-centric programs.

[Visit site](#)

---



#### **Demandbase**

Identify and manage the accounts that will have the biggest impact on your business. Target key decision-makers and draw them to your site through account-based advertising.

[Visit site](#)

---



#### **Punch! ABM**

Punch! serves technology businesses across EMEA, the US and APAC, creating and delivering unique account-based marketing experiences with personalised content and relationship-building campaigns.

[Visit site](#)

---



#### **Maitastic**

Turn your company email signatures into a strong marketing channel with Maitastic. Create and manage email signatures of all employees easily and centrally.

[Visit site](#)

---



#### **Sigstr**

Transform your employees' email signatures into an amazing ad channel for event promotion, content distribution, ABM and more.

[Visit site](#)

---

## Referral Marketing

---



### Mention Me

Mention Me is a powerful referral marketing platform. Share brands using a wide range of social channels.

[Visit site](#)



### Bulbshare

Interact with your customers in real-time, send push notifications and get rich, multimedia responses – and then analyse all your data through a powerful analytics dashboard.

[Visit site](#)



### Peg

Peg helps analytically-minded companies turn influencer marketing into a scalable growth channel.

[Visit site](#)

## Convert

### Website

---



### HubSpot CMS

Build a powerful website that's optimised for every device, personalised for every visitor using data from HubSpot CRM, and integrated with all your marketing tools – right out of the box.

[Visit site](#)



### Wix

Wix is a web development platform enabling anyone to build a stunning online presence using simple cloud-based creation and management tools.

[Visit site](#)



### **Squarespace**

Squarespace's platform empowers people to create an impactful, stylish, and easy-to-manage online presence.

[Visit site](#)



### **WordPress**

Use WordPress to create a free website or build a blog with ease. Includes free hosting and support.

[Visit site](#)



### **WP Engine**

WP Engine is a digital experience platform which provides managed WordPress hosting for mission-critical sites around the world.

[Visit site](#)

## **Inbound Marketing**

---



### **Unbounce**

Create and publish your own landing pages, without needing a developer to code them. An easier and faster way to get more conversions from your website traffic.

[Visit site](#)



### **Drift**

Connect Drift's conversational marketing platform to your website. Use chatbots to generate more qualified leads and book more meetings for your sales team.

[Visit site](#)



### **Hotjar**

See how visitors are really using your website, collect user feedback and turn more visitors into customers.

[Visit site](#)

**Leadfeeder**

Leadfeeder shows you the companies visiting your website, how they found you and what they're interested in. Generate leads from website analytics.

[Visit site](#)

**Lead Forensics**

The software that reveals the identity of your anonymous website traffic, and turns them into actionable sales leads.

[Visit site](#)

**Delight****Email Marketing**

---

**Mailchimp**

Mailchimp helps you design and share campaigns across multiple email and ad channels.

[Visit site](#)

**Constant Contact**

An all-in-one email marketing tool designed for small businesses.

[Visit site](#)

**Salesforce Email Studio**

A targeted email marketing provider for Fortune 500 and small businesses alike.

[Visit site](#)

**Robly**

An email marketing platform for small and medium-sized businesses. Robly guarantees 50% more opens.

[Visit site](#)



### Campaign Monitor

Campaign Monitor makes it radically easy to create, send and measure the impact of your email marketing campaigns.

[Visit site](#)



### Bluecore

Trigger, prioritise and personalise your email marketing and launch campaigns in seconds.

[Visit site](#)

## Content Marketing



### Turtl

Engage and convert your audience with modern content experiences created, published and analysed via Turtl's cloud-based software.

[Visit site](#)



### Skyword360

Skyword360 offers an enterprise content marketing platform, a global community of storytellers, and industry-leading content marketing services.

[Visit site](#)



### Showpad Content

Showpad Content bridges the gap between marketing and sales by creating one centralised location that lets sellers discover, present and share visually-engaging content.

[Visit site](#)

**inflo.Ai**

The world's first AI-powered end-to-end SEO blogging tool. Devise, create and post original, optimised blog content, boosting your website's search ranking.

[Visit website](#)

**Inkpact**

Inkpact allows businesses to forge emotional connections with customers via personalised handwritten communications.

[Visit site](#)

## Video and Webinar

---

**Vidyard**

Vidyard hosts your videos, analyses their effectiveness, and gives you the power to transform them into your new favourite marketing tools.

[Visit site](#)

**DaCast**

DaCast's goal is to offer the highest quality video streaming solutions at the most competitive pricing.

[Visit site](#)

**Seenit**

A creative platform that enables large companies to engage with their employees, fans, and customers in a relevant and scalable way.

[Visit site](#)

**GoToWebinar**

GoToWebinar is the world's most widely used webinar and webcasting software.

[Visit site](#)



**ON24**

Webcasting and virtual environments for corporate communications, delivered via a cloud-based SaaS application.

[Visit site](#)

Close

**Marketing Automation**



**HubSpot Marketing Hub**

An all-in-one integrated solution which contains everything you need to do internet marketing.

[Visit site](#)



**Marketo**

Marketo provides powerful software that empowers marketers to build brand value, grow revenue, and prove impact.

[Visit site](#)



**Pardot**

The popular B2B marketing automation platform featuring lead scoring, nurturing, email marketing and more.

[Visit site](#)



**ActiveCampaign**

ActiveCampaign automates many behind-the-scenes processes, helping growing businesses to meaningfully connect and engage with their customers.

[Visit site](#)



**Autopilot**

Easy and visual marketing software for automating the customer journey. Acquire, nurture and grow leads into customers.

[Visit site](#)





### **Leadsquared Marketing Automation**

An all-in-one sales execution and marketing automation platform. Capture leads, visualise customer journeys and measure performance.

[Visit site](#)



### **Adgistics**

An intelligent technology platform that enables brand owners to streamline the creation, management and distribution of brand and marketing assets.

[Visit site](#)



### **Dotdigital Engagement Cloud**

A SaaS marketing platform that enables companies to create, test and send data-driven automated campaigns.

[Visit site](#)

## **CRM**



### **Salesforce CRM**

The world's #1 CRM solution. Salesforce CRM gives all departments a single, shared view of every customer.

[Visit site](#)



### **HubSpot CRM**

A 100% free CRM solution that organises, tracks and nurtures leads and customers. A great choice for startups and scaling businesses.

[Visit site](#)



### **Zoho CRM**

Reach out to prospects at the right moment and engage them across every channel. Zoho CRM helps businesses of all sizes close more deals the smarter way.

[Visit site](#)



### **Microsoft Dynamics 365**

A CRM solution that drives sales productivity and marketing effectiveness through social insights, business intelligence, and campaign management.

[Visit site](#)



### **Pipedrive**

The web-based sales CRM and pipeline management software, designed for small and scaling companies.

[Visit site](#)

## **Analyse**

### **Analytics**



### **Google Analytics**

Google Analytics gives companies rich insights about their websites, their audiences and their digital marketing - for free.

[Visit site](#)



### **Adobe Analytics**

An industry-leading solution for applying real-time analytics and detailed segmentation across all marketing channels.

[Visit site](#)



### **Ahrefs**

Ahrefs is a set of SEO tools that can help you in almost every aspect of content marketing. Audit your website, explore competitors, research keywords and backlinks - all in one place.

[Visit site](#)

---

## Siteimprove

### Siteimprove

Improve content quality, drive search engine traffic, meet data privacy requirements and measure website performance and ROI - all from a single platform.

[Visit site](#)

---



### Moz

Learn how your site health, link building, and keyword performance impact your SEO success.

[Visit site](#)

---



### Ruler Analytics

Ruler Analytics enables sales and marketing teams to work smarter, together - by uncovering the data behind every visitor, touchpoint and conversion.

[Visit site](#)

---

## How to buy tech the right way

Tech stacks are all well and good. But how can you make the right decisions for implementing technology in your business? As we've identified, there is a huge amount of choice out there for B2B companies. How can you make the right choice? At what point does it become obvious that a particular tool is right for you?

Three sales leaders and one revenue operations manager gave us their advice for buying tech the right way.



Cognism 

*"Tech should always be solving a problem. When you're looking at providers, ask yourself: what difficulty is this going to solve for me or my team? What value is this solution going to deliver for my organisation? If the tool isn't going to provide anything extra for you or give you any benefit, then there's no point in buying it."*

*"In terms of finding the right tech for your company, my advice would be to start with **G2**, which is a fantastic resource for B2B tech buyers. Look at the user reviews and take it from there. Arrange demos with the vendors you really like the look of. Also, ask peers in your industry. What tech are they using? Some of the best recommendations will come from people you know."*

**– Nazma Qurban, Chief Revenue Officer at Cognism**



 Peakon

*"What we've done at Peakon is map our tech stack against our pipeline process. We work out how much time we spend on certain tasks, such as prospecting, presenting, admin etc. Then we take a step back and ask ourselves: can we use tech to get the time we spend down? Is there a way to work smarter and automate the more time-consuming tasks? All sales tech should be geared around giving sales reps more time to sell."*

*"I'd echo Nazma's comments about speaking to people in your industry about the tech they're using. Word of mouth is very powerful. Your peers have probably faced the same challenges as you, and they can often point you towards the best solutions."*

**– Neil Ryland, Chief Revenue Officer at Peakon**



**SALES CONFIDENCE**  
INSPIRING GREAT SALES LEADERS

*"I think it's important to consider the impact that technology can have on the wider organisation. Sometimes, the tool that looks perfect for a sales team will have negative implications on marketing, on product or CS. Don't just sign up to using a solution if it hasn't been thoroughly tested."*

*"My recommendation is to set up a buying committee for your business. It should be a group of people from all the major departments - sales, marketing, product, CS, finance. Every time a new piece of tech is suggested, put it before the buying committee. Let the committee review it and come to a unanimous decision if it should be implemented."*

**– James Ski, Founder and CEO at Sales Confidence**



**Cognism** ≡

*"My number one tip when it comes to tech stacks is: don't buy technology for the sake of buying it. I've seen it happen at a number of companies, where they already have a full tech stack but they keep buying into new products, thinking it will fix something quickly. In fact, the opposite is true. The more technology you buy, the more complicated your processes will become."*

*"Before you buy any new tech, do an audit of your current tech stack. Chances are, you've got tech that can solve the problem already, but you're not using it properly. You want to be aiming for a full utilisation of your current tech stack. Make use of what you've got before adding anything new. Don't let your tech stack grow out of control. A good tech stack should be working for your business, not the other way around."*

**– Tim Oller, Revenue Operations Manager at Cognism**

## Key Takeaways

- ✓ Only implement new tech if it solves a problem.
- ✓ Ask peers in your industry for their tech recommendations.
- ✓ Map your tech stack to your pipeline process.
- ✓ Assemble a buying committee to review new tech.
- ✓ Before buying new tech, audit your current tech stack.
- ✓ Make use of the tech you've got already. Don't let your tech stack grow out of control!

## Optimising your B2B technology stack

Our final thought is to always optimise your B2B technology stack. When you've built your lead generation tech stack and everything is up and running, don't think that's the end of the process! You must keep on improving and refining it.

A good tip is to A/B test different technologies and see what works best for your company. Study the data and measure the results to improve your tech stack, and ultimately, your lead generation strategy.

## Contact Cognism today

Cognism is the perfect complement to any B2B sales or marketing tech stack.

### For sales

- Generate actionable B2B leads from a global database of 400 million business profiles and 10 million companies.
- Identify best-fit prospects and reach out to them when they're most likely to buy.
- Automate engaging with your leads through built-in multi-touchpoint sales cadences.

### For marketing

- Create personas of your target customers using filters such as job title, company, industry, skills and location.
- Contact key accounts at optimal times using event-based triggers, such as when a prospect is promoted or a company receives funding.
- Launch your email marketing campaigns using Cognism's outbound automation. Work with verified business email addresses, ensuring 97% deliverability.

Cognism's all-in-one prospecting solution is proven to boost productivity and generate new revenue. Would you like to see our pioneering technology in action? Register today for your free demo!



**Request your demo now**

Cognism 

# B2B DATA:

The fuel for your growth

# Contents

Why B2B data is vital for growth

188

What do you know about B2B data?

188

Data sourcing tips to help fuel your growth

192

How can you keep B2B data fresh?

194

Total Addressable Market: what you need to know

196

How to build a B2B data list

199

What are the compliance requirements for B2B data?

202

Put B2B data at the heart of your business

207



## Why B2B data is vital for growth

New business is the lifeblood of any organisation. Without new customers, a business can't grow. Gaining customers relies on a smooth-running lead generation process – and especially so in the B2B sector, where competition is fierce.

The success of that lead generation process is dependant on several factors, but the most important one is data. B2B data is a vital component for fuelling business growth. A sales team is only as good as the data it uses; if, for example, if the contact data that sales reps are working with is inaccurate or incomplete, then prospecting becomes much harder and inefficient. Think of it this way: how can a salesperson sell to a prospect if they don't have their correct email address or phone number?

Data is also fundamental to analytics and forecasting. It provides the bedrock for KPIs and benchmarks for individuals and teams; it allows companies to measure their output and results. The insights gained from studying B2B data can be invaluable. Business leaders can quickly see if there are any failings in their processes and make adjustments. The most successful B2B companies are those who keep on top of their data and use it in their day-to-day decision-making.

Those are the basics of B2B data, but there is a great deal more to learn. In this guide, we're going to tell you everything you need to know about B2B data: what it is, where it comes from, what you can do with it and how you can keep it as fresh as possible. Plus, we'll give you an overview of all the latest global compliance requirements for B2B data. If you're a novice in the world of business data, by the end of this guide, you'll be an expert!

## What do you know about B2B data?

In 2018, the database management company **Exasol** commissioned a report on the importance of data to UK businesses. Their report, "Making the Enterprise Data Centric", discovered **four very significant things**:

- **80%** of the organisations surveyed confirmed that they were unable to function without their data sources.
- **25%** of the organisations surveyed were totally reliant on data in their day-to-day operations and decision-making.
- **79%** believed that they had become more reliant on data over the last five years.
- **32%** of UK business people thought that their leaders didn't understand the role and importance of data.

Exasol's report reinforces what we've already identified: that data is a vital ingredient for driving profitability and success.

Yet, as the fourth statistic shows, there's still an issue regarding education and awareness about data. B2B companies know that data is important and that they should be using it, but they often don't know how to use it or what best practice is.

At Cognism, we work with B2B data every day. It's our business. The data we supply to our customers helps them to solve their lead generation challenges, find best-fit clients and grow

their revenue. We asked our data science team to put together a B2B data cheat sheet. It's a simple introduction to B2B data and how it can fuel your business growth. Over its 5 sections, you'll learn all the important facts about B2B data.

What is B2B data?

“

**ACCORDING TO THE CAMBRIDGE ENGLISH DICTIONARY, DATA IS DEFINED AS:**





“Information, especially facts or numbers, collected to be examined and considered and used to help decision-making, or information in an electronic form that can be stored and used by a computer.”

”

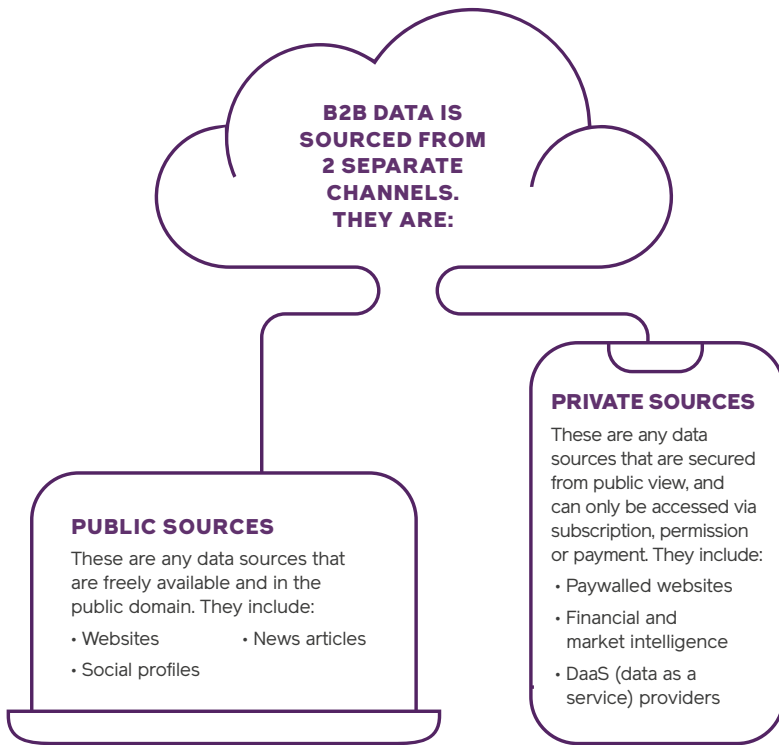
The second half of this definition is the most applicable for B2B companies. When we talk about B2B data, what we mean is information that is machine-readable, as opposed to human-readable. Machine-readable data is information that computer programs can process.

The four types of B2B data

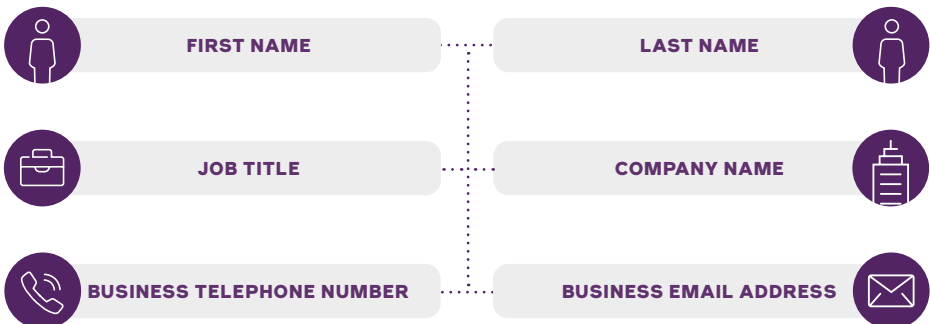
There are 4 distinct types of B2B data. They are:

 DEMOGRAPHIC DATA	 FIRMOGRAPHIC DATA	 TECHNOGRAPHIC DATA	 CHRONOGRAPHIC DATA
<p>The first type of B2B data is related to personal and geographical characteristics, including:</p> <ul style="list-style-type: none"><li>• Name</li><li>• Age</li><li>• Email address</li><li>• Telephone number</li><li>• Location</li><li>• Employment history</li><li>• Skills</li></ul>	<p>The second type of B2B data is based around company information, such as:</p> <ul style="list-style-type: none"><li>• Company name</li><li>• Company location</li><li>• Industry</li><li>• Number of employees</li><li>• Revenue information</li></ul>	<p>The third type of B2B data is related to either:</p> <ul style="list-style-type: none"><li>• The technology that an employee uses</li><li>• The technology that a company uses</li></ul>	<p>The fourth type of B2B data relates to the events and changes that occur as time progresses. For example:</p> <ul style="list-style-type: none"><li>• Company location move</li><li>• Job join or leave</li><li>• Company funding</li><li>• Company acquisition</li><li>• Company IPO</li><li>• Event appearances</li><li>• Company job hiring</li></ul>

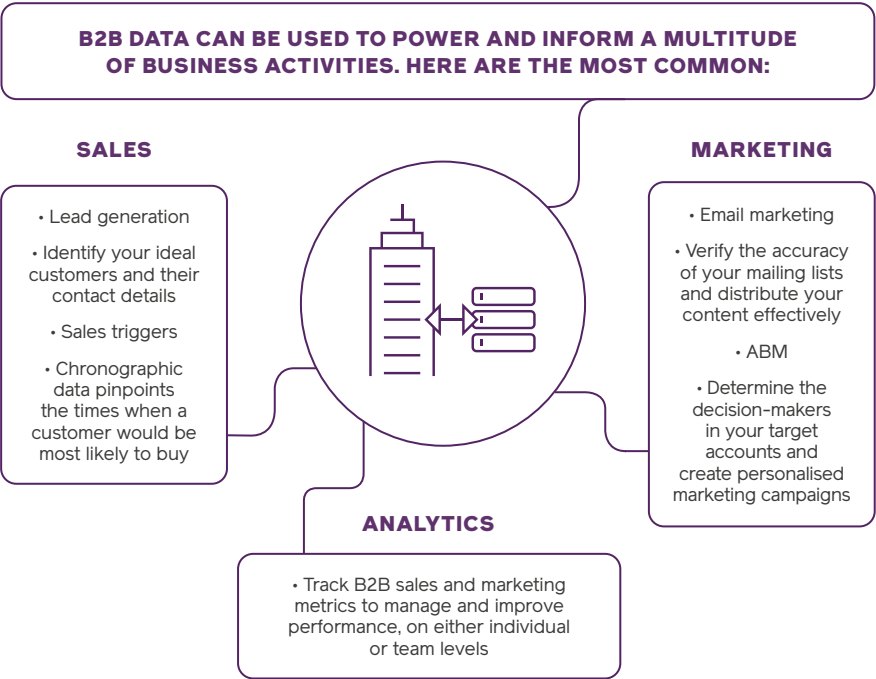
## Where B2B data comes from



## What are the key B2B data points?



## What can you do with B2B data?



## Data sourcing tips to help fuel your growth

There's no shortage of companies out there providing sales and marketing data to B2B businesses. However, how do you know which one is the best? These vendors will use different methods to compile their data, but the quality of their data will vary greatly.

You need the highest-quality B2B data to generate qualified leads for your salespeople to turn into customers. For successful lead generation and revenue growth, data quality is an essential thing to look out for. It all stems from data sourcing - where the B2B data comes from originally. Read on for more tips from Cognism's data science division.

### The three categories of B2B data sourcing

Data sourcing refers to the methods that vendors use to compile their data. Broadly speaking, there are three categories of sourcing for B2B data. These are:



Compiled data



Crowd-sourced data



Self-reported data

Let's look at each of these in turn.

COMPILED DATA	
<b>Definition</b>	Compiled data is data that has been gathered from a variety of sources over time, then merged and packaged up to sell to B2B firms.
<b>Data accuracy implications</b>	<ul style="list-style-type: none"> <li>• On average, the profiles will be 18 months old when the vendor compiles them.</li> <li>• When the data is sold on, it will be even more out of date and inaccurate.</li> <li>• It can take 12-24 months between the data being correct and it reaching your team's CRM.</li> <li>• In that time, people will change jobs, businesses can be acquired or even cease trading.</li> </ul>

CROWD-SOURCED DATA	
Definition	Crowd-sourced data is data collected from a group of people. Often, contributors are offered incentives to input their data into the wider data pool.
Data accuracy implications	<ul style="list-style-type: none"><li>• The data is only as reliable as the source that inputs it.</li><li>• Data points drawn from separate sources often conflict with each other.</li><li>• Crowd-sourced data is usually out of date or full of unnecessary duplications.</li></ul>

SELF-REPORTED DATA	
Definition	Self-reported data is information that the subject has contributed themselves. For example, a LinkedIn profile contains information that the subject has provided willingly.
Data accuracy implications	<ul style="list-style-type: none"><li>• Self-reported data is more likely to be accurate and current.</li><li>• It's the most reliable method of data sourcing for sales and marketing data.</li><li>• Always check how regularly the data has been updated.</li></ul>

### The dangers of bad data

Using bad data when generating leads results in inefficient B2B sales and marketing campaigns. The older your data is, the less likely it is to be accurate. Every lead you contact where the person has changed roles or left the company wastes time for the salesperson.

Around a third of customer and prospect data goes out of date every year. Because they don't refresh their data often enough, most sales teams are using data that is up to 60% out of date. This creates significant problems for sales and marketing teams.

When scaling a B2B company, it's essential that you find new customers quickly; for that, you need the highest quality data possible.

### What to look for in your B2B data vendor

When shopping around for B2B data, here are some tips to bear in mind:



**What are your goals?** Be clear on the criteria for your data. If you want your leads to be in a particular industry, or in a specific location, make sure you tell your vendor.



**How and when was your data collected?** Self-reported data is more reliable. The more recently it was collected, the better.



**Can you test the data?** The best vendors offer you a chance to test the data for a short period. This is your opportunity to assess its reliability.



**What's the price?** Data is an area where you get what you pay for. You will find vendors that are offering lists exceptionally cheaply, pennies per lead. This is not likely to be accurate data, meaning the money you save is worthless.

## How can you keep B2B data fresh?

Sourcing B2B data is one thing; making sure it stays accurate and fit for business purpose is another. How can you ensure the data in your organisation is as accurate as possible?

At Cognism, **Zachary White** is our authority on data enrichment. Every day, he helps our customers bring their B2B data up to date, with more complete information that helps them sell. We sat down with Zachary and he gave us some useful insights on keeping B2B data fresh.

Cognism 



## What is data enrichment and why do you need it?

"The data in your organisation is the fuel for your sales and marketing," Zach told us. "The better your data, the better your results will be."

"Technologies such as AI have led to great advances in B2B data and what you can do with it. The process of keeping your data fresh and accurate is called data enrichment. When you enrich your data, you not only ensure it is accurate and current, you can match it with information that helps you sell, such as when a company raises a new funding round."

"In simple terms, data enrichment is the process of making your data as good and as useful as it can be. Putting data enrichment at the heart of your B2B data strategy will deliver some strong benefits to your business - namely, making your company more efficient and saving you time and money."

## How to run a B2B data health check

The first step in successful data enrichment is to give your B2B data a health check. Zach gave us a summary of how to do this.

"Companies cannot function effectively with legacy data," Zach said. "Data deteriorates quickly. Out of date information can cause serious harm to your sales or marketing campaigns."

"The biggest clue that your data isn't right is a rise in the number of bounced emails when you run a campaign. That means the people you thought you were contacting are no longer at the same companies. New people are in their place, but they are not finding out about your product."

"If this is happening, you need to perform a data health check. Look at the data in your company CRM. How old is it? If poor, outdated information is affecting your outbound and marketing efforts, it's time to look at data enrichment."

Here are Zach's three top tips for data enrichment success:



### 1. Plan ahead

"Before you start on data enrichment, formulate a strategy to get the most from the process," said Zach.

"You must know what you want to do with your data before you enrich it. Think about what you use data for in your organisation. Remember, the types of data you need for sales or marketing campaigns may differ."



### 2. Segment your data

"Don't enrich all your large data-sets in one go," Zach advised. "Segment your data into smaller blocks which you can enrich one at a time over a more extended period."

"What's the reason for this? Data goes stale extremely quickly. For every 100 records you enrich, 10 of them will go back out of date by the following month."



### 3. Keep up the good work

"Once you have enriched all the data you need, check it thoroughly. Go back over your data, looking for gaps. You may need to enrich it again."

"Because data deteriorates so quickly, data enrichment isn't a procedure you can do once and forget about it," Zach concluded. "It's more like an ongoing process. You have to keep enriching regularly to get the best results from your B2B data."



# Total Addressable Market: what you need to know

Every B2B startup that successfully scaled started off as the same thing: an idea. Before you turn your idea into a tangible product, it's important to know how many people might be interested in it. The best way of achieving this is to calculate your Total Addressable Market (TAM).

## Why is TAM important?

It all comes down to a basic business principle: know your customers! If you don't know your TAM, then you don't know how many potential customers are out there, and you don't know how fast your business may grow.

As well as giving you a top-down overview of your target market, TAM is also useful for segmenting your audience into different groups. It assists you in identifying which types of customers would be most receptive to your offering – meaning you can allocate resources accordingly. It gives you a good idea of where you can expect the best return on your investment.

Investors also look for well-thought-out TAM calculations. If you can prove that you have a good understanding of the market and your product's place in it, then investors will be much more likely to buy into your company.

## TAM explained: a brief definition

So what exactly is Total Addressable Market? Put simply, it's a calculation that represents the total revenue opportunity that's available to a product or service. It's normally measured in terms of revenue, but it can also be expressed as the total population of companies that could become your customers.

It's important to stress that a well-calculated TAM isn't an accurate measure of all your future customers or revenue; it must take into account your competitors, who will always grab a slice of the TAM pie. But it's a good starting point for learning how many people or companies could potentially purchase your product.

## How to calculate TAM

There are three ways to approach calculating TAM. They are:

### 1. Top-down

#### How it works

The top-down method involves taking the total number of people in a dataset and then applying demographic and geographic filters, narrowing the results down until you reach a market subset.

### **What are the advantages?**

Top-down relies on gathering macroeconomic data from third-party organisations. This type of data pre-exists and can be easily sourced from a variety of global institutions.

### **What are the disadvantages?**

Because the data comes from third parties, it may not be entirely accurate. The top-down method also doesn't account for disruptive products that alter or create brand new markets due to their popularity (e.g.: the Uber app dramatically increased the number of people making taxi rides per year).

## **2. Bottom-up**

### **How it works**

The bottom-up method is the reverse of top-down. You start with a smaller market subset and then extrapolate from that until you discover a total population of buyers. Unlike top-down, however, bottom-up TAM relies on your own primary research (e.g.: a survey conducted in a local market, or a pilot campaign in a small geographic area).

### **What are the advantages?**

Bottom-up TAM is based on your own data generated in-house; therefore the end result is far more likely to be accurate and relevant to your business.

### **What are the disadvantages?**

Due to the assumptions being made from a small subset of data, the ultimate TAM calculation derived from the bottom-up technique can be misleading. This is particularly pertinent if you're trying to make a global TAM calculation, where factors such as population density, economic prosperity and consumer habits can vary from country to country.

## **3. Value-theory**

### **How it works**

The value-theory approach begins by asking what a buyer would be willing to pay for a product or service, based on the value it delivers. You then multiply this by the total number of people or companies that perceive the same value and would be willing to adopt your solution in place of the competition.

### **What are the advantages?**

Value-theory is useful for companies that have developed a unique product which is creating new markets or reshaping current ones. It's a good method for companies that don't have any market data at their disposal or don't have the resources to conduct their own research (typically startups).

It's also beneficial if you're testing new features or upgrades to existing products, and you want to know how many people would get value out of your latest idea, and how much they would be willing to pay for it.

### **What are the disadvantages?**

Value-theory is largely based on conjecture and guesswork; its conclusions will never be 100% accurate, but by focusing on the value your product can deliver to consumers, you can estimate how to capture that value through pricing.

#### **How we use TAM at Cognism**

Cognism's growth strategy all started with TAM. By thoroughly investigating and defining our buying audience, we were able to develop innovative products that suited their needs and codify successful go-to-market strategies for sales and marketing. It's partly the reason why we've scaled so well over the last 2 years - growing our revenue by 600% in 2018 and going from \$2.5 million to \$7 million in ARR in 2019.

Would you like your business to grow in the same way? Our advice is - lock down your TAM first! But that's not the end of what TAM can do for you. In the next section, we'll explain what you can do with your TAM once you've identified it. Read on for more B2B data insights!



## How to build a B2B data list

**Kristapor Giragosian** is VP Americas at Cognism. Prior to his promotion overseeing Cognism's New York office, Kristapor was Cognism's VP of Customer Success, responsible for building and scaling a BESMA award-winning CS team.

An outcome-driven leader, Kristapor is passionate about scaling SaaS with data and innovative technological solutions. We asked Kristapor for his guidance on how to build B2B data lists that are best-in-class. He was delighted to share his knowledge of leveraging the power of data to help your business grow.

Here are Kristapor's steps for building a killer B2B data list:



### Step 1: Identify your TAM

Using the methods described in the previous section, work out your Total Addressable Market (the whole universe of buyers available for your product). For best results, I recommend using the bottom-up or value-theory approaches.



### Step 2: Segment your TAM by your Unique Value Propositions (UVP)

This step requires you to split your TAM into smaller sections. At Cognism, we segment our TAM calculations by our Unique Value Propositions (UVP). These take the form of the different industry verticals we wish to target – for example, marketing, tech or recruitment.

The end result of this step is that instead of having one giant list, you'll have several smaller lists for each of your target industries.



### Step 3: Segment the industry lists by company size

Now you'll have to get even more granular. Take your industry lists and split them into even smaller lists, based on company size. We follow this "company size guide" at Cognism:

At the end of this step, you will have many separate B2B data lists, split into industry and company size categories.

COMPANY DESCRIPTION	NUMBER OF EMPLOYEES
SMBs (small and medium-sized businesses)	1-49
Mid-market	50-999
Enterprise	1,000+



#### Step 4: Build out a list of buyers

The next step is to identify the total audience of buyers inside each company. However, don't just look for the C-suite! You need to find buying influencers as well as decision-makers.

Remember this useful fact: while 64% of the C-suite has final sign-off, **81% of employees outside of the C-suite influence purchasing decisions.**

A good place to start is to sort prospects into groups divided by job title. For instance, you should build out a list of buyers for each company, including the CEO, Directors, Heads and Managers.

In my experience, these are the number of people you need to locate per company size:

COMPANY DESCRIPTION	NUMBER OF EMPLOYEES
SMB	3
Mid-market	3-5
Enterprise	5-10



#### Step 5: Enrich your B2B data lists

Once you've locked down your B2B data lists, you need to go one step further. You need to ensure that the data you hold is 100% correct and up-to-date.

Technology will help you here. Platforms such as Cognism can automatically enrich your data, filling in any missing gaps and removing duplications. When you hand over your B2B data lists to your salespeople, you must be confident that the information at their fingertips is accurate and current.

See the section *How can you keep your B2B data fresh?* by my colleague Zachary White for more insights into data enrichment.



**Step 6: Filter your lists using sales triggers**

For best results when you outreach to your buyers, segment your lists even further using sales triggers.

A sales trigger is any event or occurrence which creates an opening for a sale. These are some of the most common sales triggers you'll encounter:

- When a manager is promoted to Head of Department.
- When an employee leaves one company and joins another.
- When a business relocates to a new office in a new city.
- When an organisation secures a funding round from investors.

Here's a practical example for you. You may have a list of Sales Directors and Team Leaders for your target accounts - but only sales triggers will highlight which of them were hired in the last 6 months and so may be looking to review suppliers, implement processes and bring in new tools.

By adding a chronographic element to your B2B data lists, you'll be able to pinpoint when a particular prospect on your list would be most likely to buy.

Again, technology can assist you here. Cognism's all-in-one globally compliant prospecting platform incorporates the following sales triggers:



**Location Move**



**Job Join**



**Job Leave**



**Company Funding**



**Company Acquisition**



**Company IPO**



**Company Event Appearance**

**Be B2B data smart**

In my opinion, the last two steps are by far the most important. Building a list of B2B prospects isn't hugely difficult, but your list will be useless if it isn't accurate and timely.

You want your salespeople to have the best ammunition when they go into battle; an enriched B2B data list, filtered with sales triggers, is the best you can give them!

If you need more advice on B2B data, I'm happy to help! Connect with me on LinkedIn or contact Cognism today. I'm proud to work for an organisation that solves complex B2B data challenges for our 500+ customers every day!

# What are the compliance requirements for B2B data?

As we move into the next decade, countries around the world are following the lead of the EU and bringing in stricter data compliance laws, with harsh penalties for companies who fall foul of them. If you're working in B2B, it's essential that you know what you can and can't do with your data.

**Megan Bennett** is Cognism's Compliance Officer. This is her guide to all the latest trends in B2B data compliance.

Cognism 



## Current data compliance laws



### The GDPR

The most well-known data compliance law, particularly in the UK, is the General Data Protection Regulation, or **GDPR**. It came into force in May 2018 across the whole of the EU and EEA.

#### 1 What are the aims of the GDPR?

The GDPR's aim was to give citizens more control over their personal data, as well as set out ways that companies must process and protect the data they hold about their customers.

#### 2 Does the GDPR apply for B2B?

GDPR rules around processing personal data do apply for B2B companies. But they can still carry out marketing activities such as cold calls or emails, if they can prove 'legitimate interest'.

#### 3 What are the penalties for non-compliance?

Penalties for not adhering to the GDPR are severe, with the maximum fine being €20 million or 4% of annual worldwide turnover for the preceding year - whichever is greater.



## CASL

The Canadian Anti-Spam Legislation, or **CASL**, came into force in 2014. CASL concerns email marketing and applies to all emails sent to Canadian residents as part of commercial activity.

### 1 **What are the aims of CASL?**

CASL protects consumers and businesses from the misuse of digital technology, including spam and other electronic threats. It also aims to help businesses stay competitive in a global, digital marketplace.

### 2 **Does CASL apply for B2B?**

- The primary feature of CASL is that recipients must give companies consent before they can email them.
- Implied consent can be used to send unsolicited B2B emails if the person's email address is publicly available (e.g.: on company websites) and unaccompanied by a statement which confirms they do not wish to receive email marketing to their business email address.
- If the person's email address isn't publicly available, B2B companies must ensure they only contact customers or prospects who have consented.
- Another provision of CASL that a clear unsubscribe option is included in all marketing communications.

### 3 **What are the penalties for non-compliance?**

The penalties under CASL can be severe. The maximum fines are \$1 million for individuals and \$10 million for corporations per violation.



## CAN-SPAM

In the US, the **CAN-SPAM** act has been in force since 2003, governing commercial emails.

### 1 **What are the aims of CAN-SPAM?**

CAN-SPAM dictates that marketers cannot be dishonest when sending electronic messages. It also requires them to provide an unsubscribe function in their emails and act on it within ten days.

### 2 **Does CAN-SPAM apply for B2B?**

There are no exceptions for B2B marketers under CAN-SPAM.

### 3 **What are the penalties for non-compliance?**

CAN-SPAM is enforced primarily by the FTC (Federal Trade Commission). The FTC has the power to impose penalties of up to \$16,000 per email that violates CAN-SPAM.



## New and future data compliance laws

With the GDPR, the EU set a standard for data compliance which other states and countries now want to follow.

### California

On 1st January 2020, the California Consumer Privacy Act, or **CCPA**, came into effect in the US state of California. It applies to any for-profit entity doing business in California, that meets one of the following:

- Has a gross revenue greater than \$25 million.
- Annually buys, receives, sells, or shares the personal information of more than 50,000 consumers, households, or devices for commercial purposes.
- Derives 50% or more of its annual revenues from selling consumers' personal information.

The law also applies to any entity that either:

- Controls or is controlled by a covered business.
- Shares common branding with a covered business, such as a shared name, service mark, or trademark.

In addition, parts of the CCPA apply specifically to service providers and third parties.

#### 1 What are the aims of the CCPA?

CCPA is similar to the GDPR in that it requires companies to identify all personal information they hold on their customers, as well as how they sourced that information. They must provide and publicise unsubscribe links on company communications, as well as delete personal data if the customer demands it.

#### 2 Does the CCPA apply for B2B?

B2B marketing activity is covered by the CCPA, although B2B companies do not have to comply with some parts of the act until 2021.

#### 3 What are the penalties for non-compliance?

The maximum penalty granted under the CCPA is \$7,500 per violation, if the violation is found to be intentional.

### Maine and Texas

In the wake of the CCPA, other states are considering bringing in their own data privacy laws. In **Maine**, a new law regulates what broadband providers can do with their customers' data, including their browsing histories.

At the same time, in **Texas**, a new law requires companies to notify residents if they suffer a security breach which could lead to theft of personal information. A similar provision exists in the GDPR.

## Brazil

In Brazil, the **LGPD** will come into force in August 2020. The new law regulates companies that hold data on citizens of Brazil, whether they have a physical presence there or not.

Like GDPR, the LGPD governs how companies can keep data on their customers. This law **does not apply to B2B activities**. However, it's a good illustration of how countries are tightening up their data privacy laws. The direction of travel is towards tighter regulations everywhere.

## Why are data compliance laws spreading around the world?

The introduction of the GDPR across Europe in 2018 showed the world that you can legislate to protect data privacy. It has normalised stringent privacy and data protection rules, while promoting best practices in marketing communications.

In addition, anything that reduces the number of irrelevant calls or emails received by consumers will be seen as a good thing. It's no surprise then that other countries and states have been inspired to tighten their regulations too.

California is leading the way in the US, although it currently looks like the rules will vary between individual states. This makes it very difficult for B2B companies to keep track of everything. They will need to employ increasingly complex compliance mechanisms to keep on top of new legislation. In practical terms, businesses will choose to align themselves with the most stringent laws, rather than adapt their policies to every state.

## What are the risks of non-compliance?

Rules around data protection vary from country to country and state to state. So too do the penalties and fines for breaking them.

It's vital for B2B companies to stay informed and updated about the regulations that apply to their industries and the territories they do business in. If you don't, you could face hefty penalties, as two companies in the UK are finding out to their cost.



### Marriott International

The Information Commissioner's Office (ICO) signalled its intention to fine the hotels giant, Marriott International, **£99.2 million** for breaking GDPR rules around a data breach. Personal data relating to around 7 million UK citizens was compromised as part of the breach, which happened in 2014 but wasn't discovered until 2018.

While the breach happened to a different company, Starwood, Marriott acquired Starwood in 2016. The ICO found that Marriott did not do enough due diligence around their acquisition of Starwood and had not done enough to secure its systems.



### British Airways

The ICO intends to fine British Airways an even larger amount: **£183.39 million**. This relates to a cybercrime incident in September 2018, where some visitors to the BA site were directed to a fraudulent mirror site, which was used by criminals to harvest personal details. The ICO found that BA did not do enough to safeguard its customers' data.

## Stay informed about B2B data compliance laws

Regulations around B2B data compliance are ever-changing. The best place to stay updated is the **Cognism blog**. Add us to your bookmarks or subscribe to our newsletter.

Also, don't forget to follow Cognism's social media channels. We will be sharing more data compliance updates throughout 2020 and beyond.



## Put B2B data at the heart of your business

Data must be at the heart of your B2B company. It informs every decision you take, from budgeting, investments, staffing and product. It is vital to B2B lead generation and growing your customer base.

If you haven't considered making B2B data central to your business processes, our guide is a great place to start. Follow the steps we've described and you'll soon see the difference data can make in driving leads for your business. Focus on data quality, build out your TAM, identify the buyers in your target companies and outreach to them in full compliance with B2B data regulations. Let data be the fuel for your growth.

## Contact Cognism today

Cognism is the world's best all-in-one globally compliant prospecting solution. We provide high-quality B2B data, enriched by our patented AI technology, plus all the sales acceleration tools you need to action it.

Our platform is delivering impressive results for our 500+ customers worldwide, including:

- A **North American tech company** found and engaged with 100,000 niche prospects and signed several high-value deals.
- A **global B2B marketing agency** improved their data quality and boosted attendance and engagement rates for their webinars.
- An **inside sales recruitment agency** increased their lead velocity by 327% and landed their largest-ever 6-figure contract.

Would you like to join our growing list of customer success stories? Then register for your free demo today!



**Request your demo now**

