The ultimate guide to creating pipeline that will actually close.

This guide will help your sales organization — from AEs to frontline sales managers and beyond — identify, implement, and expand prospecting best practices.

Outreach

Table of contents.

What you'll learn.

Today's selling landscape is challenging. Every sales team feels it. Every business feels it.

Uncertain economic conditions are tightening marketing budgets and spreading business development support thin. Inbound demand and leads are dwindling, while buying processes are increasing in complexity and duration.

These challenges mean that sales leaders and frontline sales managers are still under pressure to hit a number. But now they need the whole sales team (not just business development reps) to self-source their own pipeline coverage.

The new reality is that AEs must create more of their own pipeline to reliably hit quota. AEs must also create that pipeline *efficiently*, so they can balance prospecting with closing deals. And with thinner pipeline, AEs need to focus on not just pipeline *quantity*, but also pipeline *quality*.

Of course, building qualified pipeline with better prospecting is only part of the story. Sales teams also need to convert their opportunities into revenue.

In this guide, you'll learn:

- How to create more pipeline with better, more personalized email prospecting
- How to scale winning prospecting strategies across sales teams
- How to increase rep productivity, from creating pipeline to closing it

Ultimately, sales teams will be empowered to build pipeline more *consistently*, *effectively*, and *efficiently* — so they can move opportunities forward and close more deals.

How to create more pipeline.

Why sales emails get ignored.

The average cold email response rate is less than 1 percent.[1] That low response rate indicates that something about the traditional initial email isn't working.

So how can sellers stop getting tuned out? By writing relevant, compelling emails (i.e. personalized emails) to prospects.

Outreach data suggests that most of the time, highly personalized emails lead to better outcomes — including higher positive reply rates and more meetings booked.

High personalization email

"Saw you're [taking X action.] Are you worried about [X challenge?] We've helped [X type of company] like [similar example customer] create [outcome]. Would you like to learn how?"

vs.

Low personalization email

"I noticed you're [taking X action] and thought we could connect..."

Craft the right personalized message.

For the best results, sales teams must truly understand what matters to their audience. Knowing what's most important to prospects is fundamental for writing highly relevant email subject lines and email copy.

Here are a few helpful tips for sending prospecting messages that convert into initial meetings, and ultimately, revenue.

01 Segment your email by persona type.

02 Write winning email subject lines.

03 Use a framework to create personalized body copy.

Craft the right personalized message.

01

Segment your email by persona type.

The people who sellers are writing to should guide personalized email content. At Outreach, we target our audience based on persona, which includes their job function (e.g., sales or marketing) and level of seniority (e.g., vice president or director).

Outreach's database found that there were roughly 50 million unique job titles. With that many titles to consider, sellers couldn't confidently answer the question, *"Am I adding the right people to the right email?"* at scale.

As a result, we built a machine learning classification model that classifies every job title into one of five levels of seniority and one of 12 job functions. This allows sales teams to target an audience by persona, making it easier to send the right email to the right people every time.

C-Level
VP
Director
Manager
Individual Contributor
Unclassified

Sales	Legal
Marketing	Information Security
Customer Success	Product
Finance	Engineering
IT	Human Resources
Procurement	Operations
Unclassified	

Craft the right personalized message.

02

Write winning email subject lines.

About 35% of recipients open emails based on the subject line alone.[2] That makes email subject lines critical to email prospecting success.

Here are three tips for writing compelling subject lines:
- Keep it short, sweet, and human.
- Be creative, helpful, and/or bold enough to drive intrigue.
- Include one simple call to action.

Ensure rep emails stand out in the prospect's inbox with three examples of Outreach's **top-performing subject lines:**

The Quick Call (personalized)
The Sit Back and Sell Video
The Virtual Handshake

The Quick Call (personalized)

Subject "Quick call [Date 2 Weekdays from Send Date] Outreach - [Prospect Name]

Open Rate

75%

Why It Works

This subject line uses the principles behind a SMART Goal because it's **S**pecific, **M**easurable, **A**ttainable, **R**elevant, and **T**ime-bound).

The Sit Back and Sell Video

Subject "Building Your Sales Stack (Video)"

Open Rate

59%

Why It Works

It's an invitation for the recipient to sit back, relax, and learn about your product when it's most convenient for them. Plus, prospects don't have to do any cumbersome tasks, like reading.

The Virtual Handshake

Subject "[Sender First Name] from Outreach"

Open Rate

58%

Why It Works

It acts as a virtual handshake and leaves plenty of space for the first sentence of the email to show up in the web browser or mobile preview.

Craft the right personalized message.

03

Use a framework to create personalized body copy.

Sales teams need a blueprint for repeatable results.
It doesn't have to be a word-for-word template. It can simply be a framework.

"We have collections of sequences and templates our reps use to break through the noise and book that initial meeting. Sellers don't have to analyze what to say or when to say it because Outreach does that for them. Customers are actually receiving better content as a result."

– Ghali Bennani Laafiret, Business Strategy and Operations, Alan

For example, reps could follow this structure:

New Message

Subject

Hi [person's first name],	Intro
I read that your company has just expanded to sell apparel online.	Truth
Clothing and shoes bought online typically have the highest return rate, with 30 to 40 percent getting sent back (source: CNBC).	Pain point
How are you ensuring that returns are handled properly so they don't eat away at your profit margins?	How you can help
Our logistics company, [X company name], helped [name of biggest client] process its returns with greater speed and accuracy.	Relevant third-party proof (value proposition)
Want to learn how we did it? All the best, [salesperson's name + contact info]	Close and call to action

How to implement a winning, repeatable email strategy.

Personalizing prospect emails isn't a new strategy. However, many reps either don't do it or don't do it effectively. Why? Lack of time. Salespeople already spend 21% of their day writing emails.[2]

Developing a thoughtful, tailored message takes time. And staring at an empty text window can feel daunting for any seller. Sellers need the right tips and technology to get them started, so they can focus on crafting the message that buyers want to hear.

Fortunately, the advent of generative AI allows sellers to quickly and easily generate a first draft, so that they can focus on customizing, tailoring, and personalizing.

And that's really where a sales reps' time is most valuable — because people want to feel seen, heard, and understood in the emails reps send, even if they've never met before.

Here's how reps can use technology to streamline the personalization process.

01 Surface the right personalization points with sales tech and generative AI.

02 Create a playbook filled with sequences for email prospecting.

03 Use data to measure success and scale best practices.

How to implement a winning, repeatable email strategy.

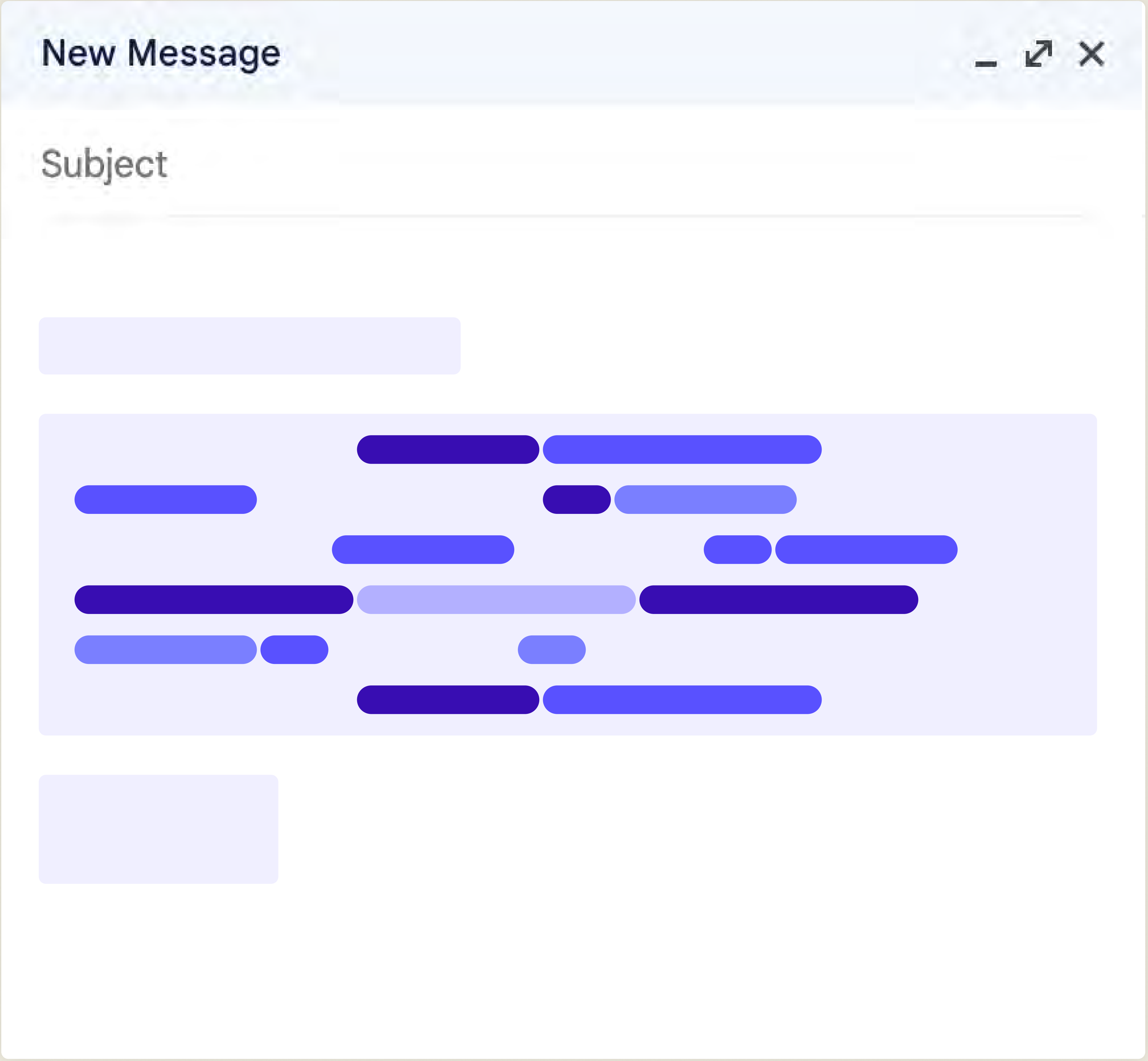
01

Surface the right personalization points with sales tech and generative AI.

A sales execution platform helps you gather data about your audience (i.e., the latest company news, social media, and essential details from the prospect's personal LinkedIn page) without manual research and all in a single view.

This information helps reps personalize emails with relevant facts about the prospect, company, or industry.

And platforms that include generative AI allow reps to focus their time on personalization rather than drafting, so they can be more productive. That way, sellers can be editors, instead of authors.



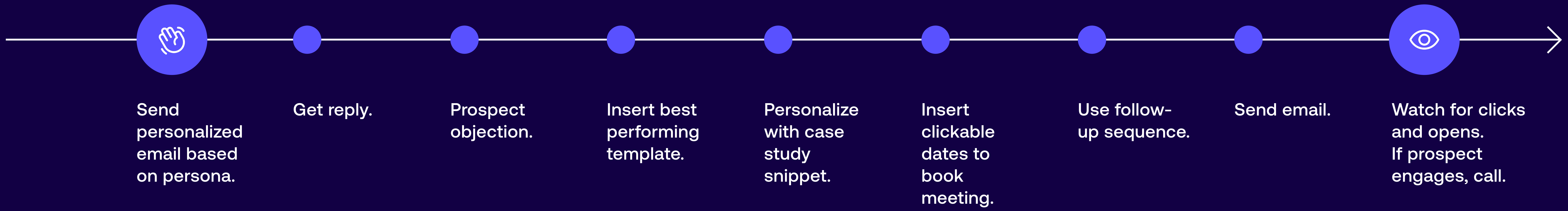
How to implement a winning, repeatable email strategy.

02

Create a playbook filled with sequences for email prospecting.

Sales playbooks consist of best practices, common sequences, scenario-based workflows, and contextual messaging that salespeople need to create and close more deals, faster.

The sequences within a playbook give your team specific actions to take, like sending prospecting emails, so reps can convert leads into customers.



02

Create a playbook filled with sequences for email prospecting cont...

Here are a few email types and how to use them, from Sam Nelson's Agoge sequence[3]:

Opening Emails:
The vast majority of the power of an entire sequence is in the first email and associated reply emails (more on reply emails later). A great first email will increase the power of the rest of the sequence like compound interest, the more attention you get from the prospect at the beginning, the more effective the rest of the steps will be even if you don't get a response initially.

Middle Emails:
Write an email that is generic enough to be used with all prospects, make your value proposition clear, and ask for a meeting at a specific time at the end.

Social Touches:
The more unique channels you use to get in front of someone the better. If your prospects use LinkedIn, it's a great channel. Sellers can send messages via a LinkedIn Connection Request, LinkedIn InMail, or LinkedIn Profile View.

The Breakup Email:
If a prospect has gotten to this point in a sequence, it is time to try something different than what has not worked so far. In a breakup email it is better to be remembered than liked. Here, more than anywhere else, you want to get attention. Ideally you want a positive reaction, but any strong reaction is better than being ignored.

There are a couple common strategies:

- Write a funny email.
- Write an unusually direct email.

03

Use data to measure success and scale best practices.

Buyer sentiment can help sales reps truly listen to what the prospect is telling them in their email response, whether the replies were “positive,” “objections,” “referrals,” or “unsubscribes.”

Rather than relying solely on reply rate to determine if a message is working, sales teams can dig into the buyer’s reaction to gauge the likelihood of the sales process moving forward, or even the next best step to take.

The best buyer sentiment analysis should help sales teams dig even deeper. Sellers should be able to see:

01.

The number of prospects who are willing to meet, schedule a conditional meeting, or want more information.

02.

Any “objections” with clear breakdowns like “already have a solution” or “financial” reasons.

Now scale it

Notice a high positive response rate on a particular email? Take that email, turn it into a template, and make it part of a sequence that the entire team can use. Now sales teams can fine-tune the messaging for even more success.

How to close more deals.

Creating pipeline is essential, but so is closing deals. AE time is limited, so they must find ways to prospect efficiently. That way, AEs can still do their primary job: closing deals and closing more deals. But if a sales team is only focused on improving prospecting, sellers can't improve their productivity — especially in today's sales environment.

Today's sales cycles are longer than ever, more stakeholders are involved in the buying process, and there are more digital touchpoints in the buyer's journey. Every opportunity is essential.

And sales organizations can't afford to make avoidable mistakes.

By following a sales process based on actionable data, sellers gain confidence that they're taking the right actions. In other words, they're using proven best practices to create more pipeline, close more deals, and hit quota.

Let's look at how to close more of the deals sellers worked so hard to create.

Run winning sales meetings.

Successful email prospecting results in more initial meetings booked, generating more qualified opportunities for sales teams to move through the sales cycle.

Sales calls can make or break deals. So reps need to be prepared to succeed in every call. Reps must avoid deal-stalling mistakes that prevent them from hitting quota. Sellers must have what they need in real-time during live meetings.

The best conversation intelligence (CI) tech delivers reps real-time enablement. CI helps frontline sales managers spot rep performance trends and opportunities for individual and teamwide coaching.

Here’s how sales leaders and frontline managers can use CI to help run more productive sales meetings:

Run winning sales meetings.

The goal.

Remove painful
non-selling tasks.

The challenge.

Boost rep productivity by automating tedious sales tasks before, during, and after meetings.

How conversation intelligence helps.

Real-time call recording and transcription:
To build accurate transcripts, use a system that learns your organization's unique vocabulary, including product names, competitors, and other industry terms.

Automated meeting email summary:
Keep deals moving forward with an automatically created, customizable meeting summary.

Action item detection and follow-up:
Use technology that detects when action items are spoken and syncs them to the meeting transcript. After the call, your system should add those action items as follow-up tasks.

The goal.

Turn data into deals.

The challenge.

Identifying risks and staying ahead of the competition requires diving deep into deals, meeting notes, and data — and it takes massive amounts of time.

How conversation intelligence helps.

Comprehensive search:
Find key moments within a conversation by searching for topics, keywords, phrases, or other meeting information within a call recording transcript.

Talk time reporting:
View rep meeting performance to understand how often reps are asking questions to ensure the buyer stays engaged. Compare rep performance to team benchmarks to ensure meetings are productive and not one-sided.

Playlists:
Compile best-in-class calls and share with the team to learn how to handle objections, questions, or competitive threats.

Get deal insights to prioritize winnable deals.

To win more deals, sales teams must quickly identify and prioritize winnable opportunities and spot at-risk deals early.

So how can reps prioritize the right opportunities and take actions that increase win rates? Sellers and their managers need the right technology to analyze deal health signals.

Here's what to watch for and why:

Get deal insights to prioritize winnable deals.

The goal.

Spot deal risks early.

The challenge.

Win more of your winnable deals by leveraging AI-powered deal health insights to quickly see where you have risks in each deal. Then coach your sellers on the actions to take to get it back on track. Identify and resolve pipeline risks fast.

How deal insights help.

Deal health scores:
Compare the status of deals in progress. Each deal is scored from 0 to 100 using 15 activity signals and comparing against other deals of similar size and stage.

Suggested actions:
Immediately take the recommended next-best actions to keep the deal moving forward by sending emails, booking meetings, or taking another action in the same window.

The goal.

Spend more time on winnable deals.

The challenge.

Determine whether a deal is winnable or not with AI-generated deal insights that compare each active opportunity with every winning and losing deal from the past. Avoid wasting time on deals that are very likely to be lost.

How deal insights help.

Deal health trends:
Easily see whether key deals are moving in a positive or negative direction.

Insight into what's working well:
See an overview of the activities an AE is taking within the deal to progress it toward close, such as number of meetings booked or emails sent.

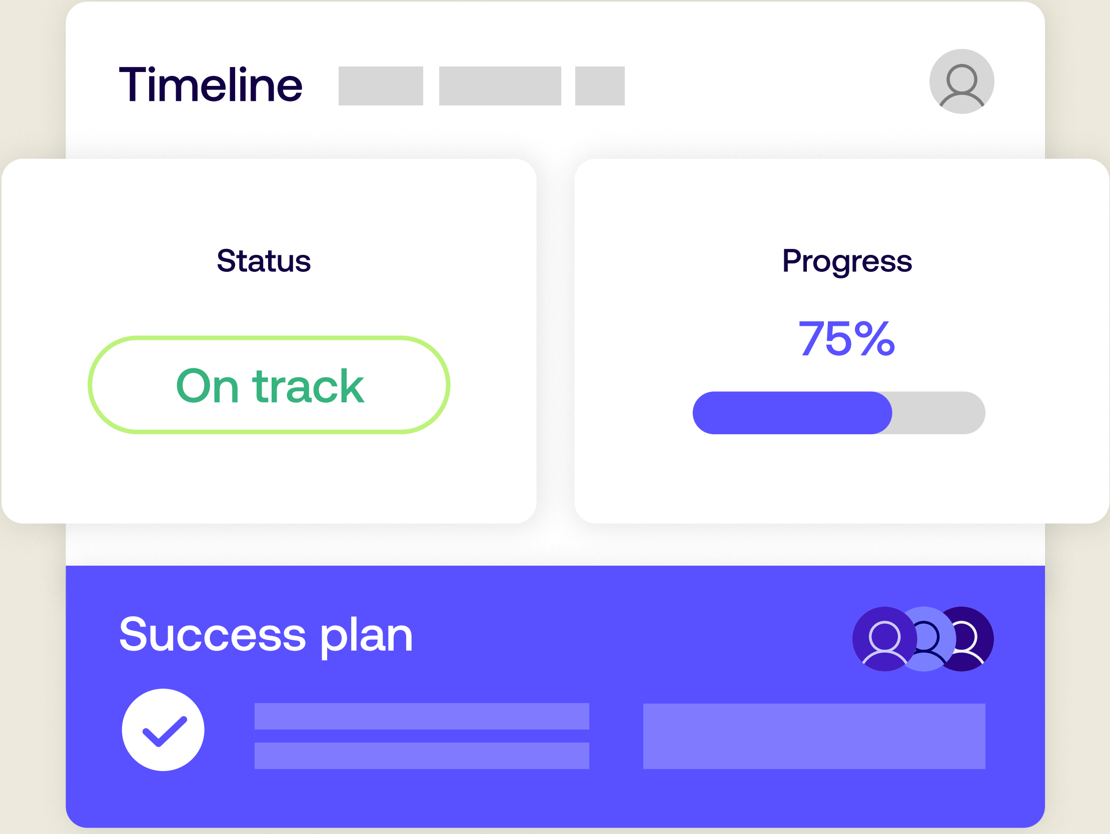
By capturing and assessing deal signals across the entire buying cycle, sales teams can run deal cycles efficiently and, ultimately, close more deals.

Drive a smooth, predictable purchase process with mutual action plans.

Mutual action plans (MAPs) lead to more closed deals overall.

Mutual actions plans improve win rates by

13%



Plus, MAPs become roadmaps for future deals. Sales leaders can operationalize their sales methodology (like MEDDIC and MEDDPICC) to drive greater qualification consistency and success across the organization.

Here's how sales reps and frontline sales managers can use a MAP to win more deals:

Drive a smooth, predictable purchase process with mutual action plans.

The goal.

Build buyer confidence, trust, and alignment.

The challenge.

Deals today involve an increasing number of stakeholders, making it nearly impossible to manage and close deals without an agreed-upon plan from the start. Sales teams need to improve the buyer experience by offering buyers, sellers, and internal stakeholders a digital environment to jointly collaborate on deal progress. Sales teams also need to keep the momentum going even if teams change.

How deal MAPs help.

Shared resources:
Share your resources with external stakeholders so they can easily refer back to them along with relevant plan details such as the next meeting and success criteria.

Team interactions:
Understand who on the buying committee is opening the plan, any deal-related emails and accessing resources and recordings in the mutual action plan to assess the strength of buyer engagement throughout the deal cycle.

The goal.

De-risk your deals and improve win rates.

The challenge.

Ensure that every deal runs like your best deals. Delivery of predictable revenue becomes ingrained in every deal with the application of proven sales methodologies. Empower sales managers to maximize methodology investments and monitor progress to close.

How MAPs help.

Mutual action plan methodologies - Template and custom field mapping:
Create and share templates that bring automation to your qualification and sales methodology while mapping to your CRM fields, making it easier for different teams to follow a consistent playbook.

Mutual action plans help sales leaders operationalize their sales methodologies, like MEDDPICC, MEDDIC, or SPIN Selling.

Shared resources:
Quickly ramp up new members added to buying committees mid-cycle by giving them access to all shared documents, recorded presentations and demos, and the list of next actions committed to by both parties.

P.S. This can’t be overstated:

Ensuring the right stakeholders and decision-makers are engaged is key to getting true buy-in and closing more deals.

Unleash rep productivity from create to close.

Sales leaders must help their sellers get more productive at scale. The key is using a system that improves prospecting success **and** close rates all in one place.

Sales teams need a sales execution platform.

Outreach is the single platform that helps everyone in the sales organization — SDRs, AEs, frontline managers, and sales leaders — efficiently create more pipeline and predictably close more deals.

With Outreach, AEs gain the efficiency they need to balance efforts between creating pipeline and closing deals, and their managers have the insights they need to help guide AEs to better sales outcomes.

As a result, sales teams can drive more revenue while lowering costs and risks across the organization.

“Sales execution happens when the sales team and supporting teams can come together to move created opportunities to closed-won revenue. So, it’s not just that we didn’t have a system for prospecting.

We did, but it was separate from how we managed opportunities. And that was separate from how we were forecasting."

— Veronica Matini, Inside Sales and Sales Development Manager, Armory

Learn more about the Outreach Sales Execution Platform:

[Get Started]

Sources

1. "Cold Emails vs. Marketing Emails: What's the Difference?" Benchmark, November 3, 2021.

2. An, Mimi, "How Salespeople Learn," HubSpot, https://blog.hubspot.com/sales/how-salespeople-learn, December 11, 2019.

3. Nelson, Sam, "The Agoge Sequence: A Blueprint for 2X Response Rates," August 30, 2018.

4. "Outreach Success Plans Win-Rate Investigation," Internal Reporting Statistics, 11/1/2021-1/31/2022, Peter Krengel.

Why Outreach?

Outreach is the leading sales execution platform that helps market-facing teams efficiently create and predictably close more pipeline. From prospecting to deal management to forecasting, our platform leverages automation and artificial intelligence to help revenue leaders increase efficiency and effectiveness of all go-to-market activities and personnel across the full sales cycle.

Outreach is the only company to offer sales engagement, revenue intelligence, and revenue operations functionalities in a unified platform to deliver better sales outcomes with greater simplicity. More than 5,500 companies, including Zoom, Siemens, Okta, DocuSign, and McKesson depend on Outreach to power their revenue organizations. Outreach is a privately held company based in Seattle, Washington, with offices worldwide.

To learn more, please visit www.outreach.io.

Request a demo

Learn more about how the Outreach Sales Execution Platform can help your organization generate more pipeline and win more deals with less effort.

Trusted by over 5,000+ businesses around the globe.