

# INTRO TO B2B SALES FOR STARTUP FOUNDERS

Everything you need to know about B2B sales to get your first customers and become a confident founder who can sell

## Who Should Read This book?

This is written for early stage startup Founders who do not have a sales background, especially technical founders. This will help them get up to speed very quickly on all the basics of B2B sales as a startup Founder. The information contained in this book is foundational. There is no fluff but it can be a bit rambling at times.

If you ever need sales help, feel free to reach out directly to me at

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## ABOUT ME

My name is Joe Benjamin and I have over a decade of early stage startup sales experience, working directly with founders of startups in various industries. I've been the first sales hire and first sales leader multiple times. I have SaaS sales experience, Marketplace sales experience, and Professional Services sales experience.

My most recent full time sales role was as GM and Head of Sales for a company called Storefront. It was a marketplace for short term commercial real estate, much like Airbnb for commercial real estate. I increased their revenue by 3.5X in one year.

I've worked at startups you've never heard of, closing business with all types of companies and job titles. I've closed deals as small as \$35 a month to over a million, and I've done it without any formal sales training: I am completely self taught.

Most recently I was the Founder of a SaaS company called CheetahIQ. I bootstrapped that and sold it in March of 2021. CheetahIQ is a search engine designed for enterprise salespeople to research their prospects before meetings, and help them write better cold outreach. They could type in a keyword or phrase, select a company or contact, and then we would show them all the relevant information. We sold to individuals and sales teams.

Currently, I'm a Sales Advisor for various startups, working on a SaaS product, and the Founder of revpilots.com - a managed marketplace that connects startups with vetted fractional sales talent and sales services. Popular roles include: Expert Sales Consultants, Sales Managers, and Sales Development Representatives. With remote work, they have anywhere from 5-20+ hours availability per week; access to this level of talent was not previously possible. RevPilots also offers Founder Coaching, Sales Playbooks, Sales Strategy, and more.



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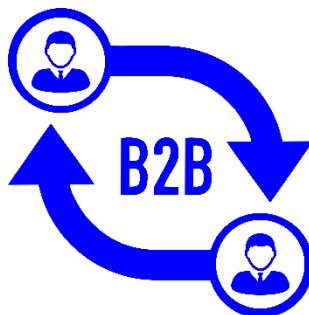
## What Is B2B Sales?

In its most basic form, business to business (B2B) sales is when one business sells something to another business.

Most technical Founders have a bad impression of sales. The term “Sales” has a bit of a reputation issue. A lot of people see sales as that “used car salesman” who will do anything to get you to buy - untrustworthy and sleazy. But that’s not what it is. Sales in the B2B world is different; it’s very much about helping customers.

Buyers are too sophisticated to be tricked into buying, and the actual buying process at many companies requires too many boxes checked to pull a fast one. This is why it’s critical to understand how sales works. Without having a clear understanding of B2B sales, you’ll feel discouraged. And if you feel discouraged, you will not want to put the effort into B2B sales. Without sales, your startup dies.

Salespeople seek out prospects, also known as potential customers. Potential customers have a problem that they may or may not be aware of, and a salesperson will help them to resolve that issue. For example, a company may have a manual accounting process that takes 20 hours a week to complete and is riddled with errors. Those errors cost the company time and money. If you developed software to automate that process and eliminated the human errors, you would have a solution well aligned to be purchased.



## Be a Consultant

As a non sales Founder, if you think of sales differently, it will help you succeed as a B2B salesperson. A good salesperson will come in and act as a consultant. They'll help the customer figure out what is the best solution for the problems that they have. They'll help them understand what the impact of the pain or problem is, what happens if this problem goes away, how they'll benefit, what the cost of inaction is, and more. They'll be seen as a trusted advisor who educates the customer. With good questions, a salesperson can help the customer understand the problem or problems they currently have. And with the properly aligned solution to the problem, the salesperson will be able to get the customer to buy their product. Remember, being good at sales is really about helping the customer and acting like a consultant.

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Side note - If you haven't, you should have done customer research before you started building a product or attempting a sale. You can actually sell before you build a product but I don't want to go off on too much of a tangent! (Suggested reading: The Mom Test). With your customer research completed, you should have a good idea of the types of companies and job titles you want to book meetings with. Don't worry, we'll talk about how to get meetings with these companies later on.

*Here's an effective message to send when doing customer research*

*Hey (name),*

*I'm trying to better understand how (job title) (problem you think you solve for.)*

*We don't have anything to sell but we want to make sure we're on the right track*

*Your experience at (companies) would help us cut through the fog. Happy to share what we learn from other (job title)*



*Open to chatting? Either way, thanks for your consideration.*

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*Works well for customer research. Easy to personalize too.*

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Remember, you're helping companies solve a specific problem, and you've developed a solution to solve that problem. Sometimes the problem you solve is not going to be a priority for the prospects you target. Companies have tons of problems. Large companies can have hundreds, maybe thousands of problems. In a perfect world, the problem you are solving is a priority to that company. If the problem is not considered a priority, then you're going to have a challenging time getting the customer to buy. Not all problems are created equally; some companies have much more important issues to solve. Sometimes you need to focus on different markets where the problem you can solve *is* a priority. And sometimes others will not be clear on the importance of solving the problem. This is where being a strong salesperson can make a difference.

If you didn't like the consultant analogy, you can also think of yourself as a business doctor. A very basic example would be you go to the doctor because you have back pain. He asks you questions about your pain, what caused it, etc. He may examine you and send you for an MRI. When the MRI comes back, he'll now have enough info that he has spent time collecting to make a diagnosis and prescribe a treatment that is aligned with the problem.

He has invested time learning about your pain, you view him as trustworthy and credible, and you feel based on his explanation and how he's answered your questions, confident that surgery is the best solution. Alternatively, if the pain is not bad, the MRI looks fine, the doctor is unable to collect enough to make a diagnosis, or you don't find the doctor to be trustworthy or credible, you're not going to have back surgery. You'll either do nothing or go see another doctor.



As a Founder selling, you'll diagnose the problem your prospects have, and help the customer understand the impact, what happens if your solution is applied, what happens if it isn't, and how their future state will be changed compared to their current one. Often, customers do nothing, so it's important that you are able to communicate effectively, helping them to better understand the cost of inaction.

## Good Salespeople

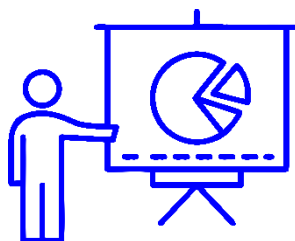
Companies that have worked with good salespeople are very happy to be working with them because they can make that company more effective. It makes everyone's lives easier - on both sides of the sales process. Good salespeople can save companies time, money, and headaches. They can move the company forward because they introduced them to a solution to a pain or problem that they had. Good salespeople are seen as trusted advisors. Companies know they can rely on them to help them solve their problems.

Another issue a lot of Founders have with sales is that it has a reputation issue: It's looked down upon; it lacks prestige. Nobody grows up wanting to be a salesperson. Additionally, Founders are constantly bombarded by salespeople with unpersonalized cold emails, cold calls, and LinkedIn messages. They don't want to be that person "bothering" prospects but they're not sure what they should be doing.

Other reasons include a lack of confidence, fear of rejection, and, most times, a preference for building over selling. One thing I can guarantee is that once a non-sales Founder understands sales, realizes rejection is part of the game, and prioritizes more time towards selling, they will like sales a lot more than they previously did. And once they start closing deals, they may even love it.

*Exercise: Make sure you're blocking off time for sales each week on your calendar.*

*Block one hour per day to dedicate to prospecting. It's usually a good idea to do this first thing in the morning to get it out of the way. If you push it off, it may never get done.*






## Founders Must Sell

A lot of Founders, especially technical Founders, struggle accepting that they have to sell. In fact, as the Founder of an early stage startup, the Founder must be the first salesperson. **It's non-negotiable.** They must be the person who is acquiring those first customers. They must be doing cold outreach, getting rejected, booking meetings, running sales cycles, and closing deals. They must sell.

It's imperative a Founder sells because you'll learn so much. Although this is a broad statement, it is a true one. You'll learn how the market reacts to your product, you'll understand who your customer is and who your customer isn't. You'll learn what product features resonate with the market, you'll learn what problems are priorities for companies to solve, how to position your product, how the market describes your product, what they like, what they don't like, how it compares to competitors and alternatives, and so much more. This early stage customer and market feedback is critical to refining your product offering and your go to market strategy. You'll build a better product because of it, and your marketing will be more effective. A lot of what you'll be doing will be invalidating and validating hypotheses. Things such as, "Is this title at this size company a customer?" or "When we send cold emails saying we solve problem X, does that get a positive response?"

It must be reiterated to save you a world of pain: **You cannot outsource sales in the beginning.** A lot of technical Founders want to hire a salesperson once they have the funds. They see a pedigreed salesperson who works at a company like Salesforce and they dream of hiring this polished, experienced professional. **Do not do it.** I cannot emphasize this enough. This is not the right approach! Early stage startup sales do not work like that - It will be a gigantic waste of money and time.

Why not? Because your product is still very new. It may not be the right product for the market. You may not be targeting the correct ICP or buyer persona. Only the Founder with the product vision who understands what problem you're truly solving and where the product will be headed will be able to capture these market



insights by selling and talking to customers. Relying on a salesperson to convey this information to you will not be effective.

Remember the “telephone game” you played in elementary school? You’ll be playing that with a premature first sales hire. You’ll lose insights, they will not be able to ask the right questions, and they’ll be more easily discouraged. Nobody will believe in your startup as much as you do, and therefore nobody will put in the same amount of time or effort to grind out the early sales. Additionally, rejection is inevitable. It will come in waves. Outsourcing this emotional toll to someone who is not fully dedicated is a poor decision.

Keep in mind, your first sales hire is expensive. A junior salesperson with a little bit of experience could cost you easily \$5,000-\$7,000 a month. Someone who is experienced is going to be at least \$10,000 a month. This is only their base salary. That's a lot of money for an early stage startup with a product that has not been proven to sell. Besides money, you’ll lose a lot of time. Depending on the type of sale, it could be months before you get any feedback on the performance of a first sales hire. Some sales cycles could be 3-6-9+ months long. Handing sales off prematurely can kill your startup. It can also demoralize the team.

But the main reason that needs to be emphasized is that you're going to get a lot of feedback. You’ll learn a ton. You're going to understand how you should position your product. You're going to understand what parts of your product are valuable and what parts of your product don't resonate with prospects. You're going to understand the pains and problems you claim to solve. You’ll also learn a ton about pricing, what the sales cycle looks like, how to get meetings, the list goes on. As mentioned earlier, understanding which problems are a priority for your customers to solve is key. Once you understand that, you can figure out how you can refine your product, marketing, and everything else. You’ll also figure out how to run sales cycles, which will put your salesperson in a position to succeed when the time is right to make that hire.

You’ll also have made assumptions about who your ideal customer profile is and what that buyer persona looks like. Now, you’ll need to confirm or reject these

assumptions - or as mentioned earlier, validate and invalidate hypotheses. The Founder is responsible for a lot of fact-finding. You need to meet with potential customers and try to get them to buy. What you learn will be invaluable. I know this section is repetitive but it's important to hammer home: **Founders must sell.**

Founders can invest in sales coaching and help booking meetings via cold outreach. Founder coaching can accelerate learning while avoiding basic mistakes. There are plenty of resources available for someone to figure sales out on their own. However, working with an experienced sales coach can make a Founder a better salesperson, and can make that happen faster.

### ***Quiz***

***Q: Who is the first salesperson at your startup?***

***A: The founder***

## When Can I Hire My First Salesperson?

Once you have a repeatable sales process with a certain number of closed clients, you can then consider hiring your first non-Founder salesperson. When you are ready to hire will vary depending on the type of sale. If you're selling to enterprise companies, you don't have to sell as many deals as the Founder because these are long sales cycles with larger contracts. But if you sell to SMB or Mid-Market companies, you're going to have to close a lot more deals than Enterprise.

Some people will say you need to close a minimum of \$200,000 ARR before you can bring on a first sales hire. Others say the Founder should close the first 1M in business. It really depends, as there is no hard and fast rule. The key is to know that you are able to create a sales playbook based on closing similar customers, and when you follow that sales playbook, you'll have predictable outcomes. A repeatable process is key. There are other considerations like confidence in being able to generate enough qualified meetings to keep the sales hire busy, a low churn rate, and of course, you're able to make the right first sales hire.

As a Founder, you'll never stop selling. You should be your startup's most effective salesperson.

When it comes to hiring your first salesperson, here's an in-depth read: <https://revpilots.com/hiring-your-first-salesperson/>

## You Can Learn To Sell

Founders are often intimidated by having to become a salesperson. It's important to know that sales isn't that hard. It's very learnable, and you don't have to be an expert salesperson to close deals. Founders think you have to be as good at sales, as they are at building products, but that is not true. The learning curve is not bad at all in sales. To get up to a 101 level does not take much time. A lot of it is understanding the basics of sales; knowing sales best practices and avoiding common sales mistakes. Things you don't know about sales are the biggest challenges to overcome for Founders. And that's why Founder coaching for sales can be a game changer. The rest of this book is going to cover much of the foundational sales information you need to know.

You don't have to be an expert seller but you do have to be an expert in your space. You should know the industry, and you should be able to educate customers on calls. Remember, you want to think of yourself as a consultant. If you educate customers about the market, provide insights, lead the conversation with something that challenges the way they're currently doing things, and explain why they should be doing things differently, you'll do well for yourself.

Clients appreciate this. After you have calls with prospective clients, you can ask yourself if a client would have paid to be on that call? Did you provide a valuable experience that was worthy of their time?

Another thing to remember is that there are early adopters and there are people who will never buy from a startup. Some companies will never buy from an early stage startup. Other companies have people actively looking for the latest and greatest technology. If you can educate those people and come in with credibility and expertise, it's going to make your life a lot easier as a seller. It helps them trust you and your early stage company nobody has ever heard of.



# Basic Outline of How Sales Works

This is a very basic outline of how sales works. It will provide clarity around the steps in going from lead to close.

## 1. Prospects

Prospects are people who you want to buy your product. Ideally, you have done customer research. See “The Mom Test” mentioned earlier. For a simple example, maybe you’re selling a solution that solves a problem for marketing departments at fast growing startups. That means, management to C-level titles at startups that have raised Series A to Series C funding would be your prospects. You would build a list of prospects at these companies. You should be building the first lists as a Founder. You can outsource list building once you have clear directions on how to build a proper list. I would caution you to not hand it off too soon - there are tools like Apollo.io - <https://revpilots.com/what-is-apollo-io/> that make it easy. Most people will use LinkedIn Sales Navigator. It’s worth paying for but make sure your prospects use LinkedIn.

## 2. Contact Prospects

If you’re not overwhelmed with inbound leads (and you won't be), you’ll need to contact prospects from your list in Step 1. Most startups are not going to have much inbound interest, so you’ll need to do cold outreach. We’ll talk more about cold outreach and how to get meetings with prospects starting with the chapter on **“How To Get Meetings With Prospects”**

## 3. Book Meetings

With enough effort and time, you’ll book meetings with prospects. These are usually 30 minute calls where you’ll run what is called “discovery.” For most products, you do not want to do a product demo on the first call. There are many reasons for this which we will discuss in the chapter on **“How To Get Meetings With Prospects.”** The first call is for discovery, where you’ll understand the prospect’s pains/problems and qualify them for a mutual fit.

#### **4. Open Up Sales Cycles**

As you book meetings, some will progress to the next step in your sales cycle and others will not move forward. For those opportunities that do move forward, your sales cycle length is related to the size of the company you're selling to, the complexity of the product, and who is involved in the decision making process. Deal size is also a factor.

#### **5. Sales Cycle Progresses**

If things go well, your sales cycle progresses. Some sales cycles selling to small businesses can be a one call close, but most B2B sales cycles will be longer. The sales cycle will progress beyond the demo stage and you may need to have meetings with other people at the company or sell your product to other people. As you move through the process you will go deal with their legal and procurement department.





#### **6. Customer Signs**

Once your contract is good to go, you'll get a signature. Congratulations, you signed a customer!

#### **7. Repeats**

Now you get to go back to Step 1 and do it all over again. It's important to remember the steps in your sales process may be different. This is for illustrative purposes only. You should be focusing on filling the top of the funnel via Steps 1 and 2 on a regular basis. That's why I recommended blocking off an hour per day for prospecting.

The Founders that I work with who have a sales problem (revenue) but a good product are usually not spending enough time on sales. Often, it's a lack of sales activity, because they do not prioritize sales. More specifically, they're just not doing enough prospecting (Steps 1 and 2.)



I recently spoke to a company that had a full sales pipe at the end of Q1 in 2021, with sales cycles that last about three months. By the summer, they had an empty sales pipe. They stopped allocating time to prospecting, marketing wasn't driving leads like they hoped, and now they were certain to miss their revenue goal. It wasn't because they didn't know how to sell, it was because they stopped selling.

Outbound prospecting on a regular basis is critical to keeping a healthy sales pipe full. For further reading, check out *Fanatical Prospecting* by Jeb Blount. It's a good book to get into the prospecting mindset. If you want my prospecting notes, feel free to email me.

Remember, the more prospecting you do, the more meetings you book, the more demos you schedule, and the more clients that move to the contract stage, the more that will sign with your company. It all starts at the top of the funnel with contacting prospects. It's also why you hear a lot of startup thought leaders say things like "the best product doesn't always win" and "first time founders think about the product, second time founders think about distribution."

As you get better at selling, you'll have more people move through the funnel. If you take your foot off the prospecting pedal, you'll have gaps in your sales pipeline. Do not stop prospecting! Block off time on your calendar to prospect every week. You'll quickly notice the more prospecting you do, the more sales opportunities you'll have in your pipe. This will create momentum. Even if you do not close deals, you'll receive feedback which is valuable.

## Sizes Of Companies

There are different types of sales strategies based on the size of companies you're targeting. These are the three main categories of company sizes.

1. SMB (small and medium size)
2. Mid-Market
3. Enterprise

**SMB companies have 1 to 99 employees.** These are your typical small businesses, local businesses, mom and pops, etc. Also earlier stage startups.

**Mid-Market companies have 100 to 999 employees.**

**Enterprise companies have 1000+ employees.**

Enterprise companies are often the well known companies that everyone wants as a logo on their website. You can name them off the top of your head. They're the Nikes and the Apples of the world.

For most startups and most founders, going after enterprise companies early on is a mistake. However, if you have built a solution designed specifically for enterprise companies this does not apply. But make sure you're 100% certain that you can only target enterprise companies. Going after enterprise companies when you do not have to can be a market blunder. The sale is more complicated (more decision makers involved), which means it's harder to close. There are often product standards, such as security requirements, that may mean your product is not ready for them to purchase.

If you can avoid selling to enterprise companies early on, it's recommended. You'll receive faster feedback from Mid-Market companies and SMBs. Enterprise sales cycles can take 6-12+ months to close. Selling to Mid-Market and SMB companies is easier, and the sales cycles tend to be less complicated. Enterprise sales is challenging. Seasoned sales people struggle selling to enterprise companies.



Many years ago I was the first sales hire at a startup with a consumer insights product. I was instructed to target Fortune 500 companies. Investors wanted us to, and the Founder had previously closed business with international subsidiaries of Fortune 500 companies. I had closed business with Fortune 500 companies in the past with a different startup, so I didn't think much of it. I built my prospect lists, I started my cold outreach, and I booked meetings. It became pretty clear early on that our product was not ready for what I call the "Mothership." This term refers to the headquarters for a Fortune 500, not the random international satellite offices.

Despite solving a clear problem at a great price, our product lacked specific enterprise features, and those were dealbreakers. This was not something a salesperson could overcome. These were also required product features that were not going to be built any time soon. Alternatives in the space had better products, the required features, and stronger case studies. We may have been less expensive, but companies that size do not care all that much about price. After a couple dozen L's, and receiving similar feedback from prospects, I decided to tell the Founder that we couldn't keep targeting these enterprise companies. We just weren't ready.

The Founder, to his credit, agreed, and I told him that we would go after Mid-Market companies instead. We changed the market we focused on selling to, and guess what? We started getting traction. Interest level increased, deals started to close! Sometimes your product is fine, but you're targeting the wrong companies with your offering.

Most startup Founders should be targeting SMB and Mid-Market companies. Keep that in mind when you're building your lists.

## Questions You Need To Answer

Answering the questions below will help you with sales and marketing. This is an exercise you should do based on your customer research calls and your sales calls. The answers may evolve as you learn more about the market.

- **What problem do you solve?**

This is pretty straightforward, or should be! If it's not, you need to go back to the drawing board. If you've built a solution in search of a problem, you're going to have a hard time selling your product. Make sure the problem you're solving is a priority to the companies you will be pitching to.

- **Who has this problem?**

What types of companies have this problem and what departments and job titles? Remember, it's possible that multiple people and job titles across the company have this problem.

- **How does this problem impact them?**

Different people are impacted differently by the problem. For some people it's a nuisance at worst, and for others it's the biggest issue in their current role.

- **What happens if this goes unsolved?**

If nothing happens if the problem goes unsolved, then you're not solving an important problem. Companies have tons of unsolved problems. If you're unable to make a compelling argument as to why this should no longer go unsolved, you're going to have difficulty selling your solution. If there's a major negative impact for not solving this problem, you're in a good position.

- **How is this currently being solved and what do the current solutions to this problem miss?**

Understanding how the problem is being solved will enable you to better

position your solution. It will also help build a solution to solve the problem more effectively.

- **Why is your product now relevant?**

A simple and obvious example would be if you built a solution that solves a remote work problem right when companies shifted to working remotely during the Covid-19 Pandemic. Changes in regulation, new technologies, and work trends can be reasons your product is now relevant.

- **How does the new solution work?**

Pretty self explanatory. Make sure you have a simple, succinct, answer that walks people through, step by step, how your solution functions.

- **What is gained by using your solution versus the alternatives?**

Being able to explain the gains and impacts of your solution when compared to the alternatives is helpful for having productive sales conversations, as well as creating more effective product positioning.

*Take some time to answer these questions. If you have a Co-Founder, sit down with them and write out your answer together.*

## How To Get Meetings With Prospects

In order to get customers, you'll need to schedule a meeting with them. It's not hard, but it does take work. The more time you spend trying to get meetings, the more meetings you'll get.

As mentioned earlier, you should have already done some customer research. You should know what the pains and problems are for your potential customers. You should also know who your potential customers are.

First you'll want to define what your ideal customer profile looks like? What size company, location, industry, etc. And you may want to include things like the technology they use or their company's revenue. If you need to target companies with specific technology, you can get technographic information. There are tools like Apollo and Builtwith that help with this. These tools allow you to find companies to target based on the technology they use. It's important to use tools to acquire technographic information because you don't want to waste time targeting the wrong prospects. Perhaps you're targeting companies based in the USA with 10-100 employees that use Shopify, because you're selling software that helps improve the checkout experience for Shopify stores. Remember, avoid enterprise companies at all costs when starting out.

Next you'll want to quickly define your buyer persona, or to keep it simple, job titles. Are you selling to Marketing departments that use Shopify? Then you'll want to target titles such as Marketing Manager, Directors of Marketing, VPs of Marketing, and the CMO.

Now that you've defined the company and buyer personas, you need to build lists. Build a list of Tier 1 prospects. And Tier T 2 prospects.

Your Tier 1 prospects are going to be the highest value prospects who you can reasonably believe to be a perfect match for your service. They'll also be people you may know or can get introduced to. For example, they can be people who went to the same college as you. Any personal connection should go into your early Tier 1 list.



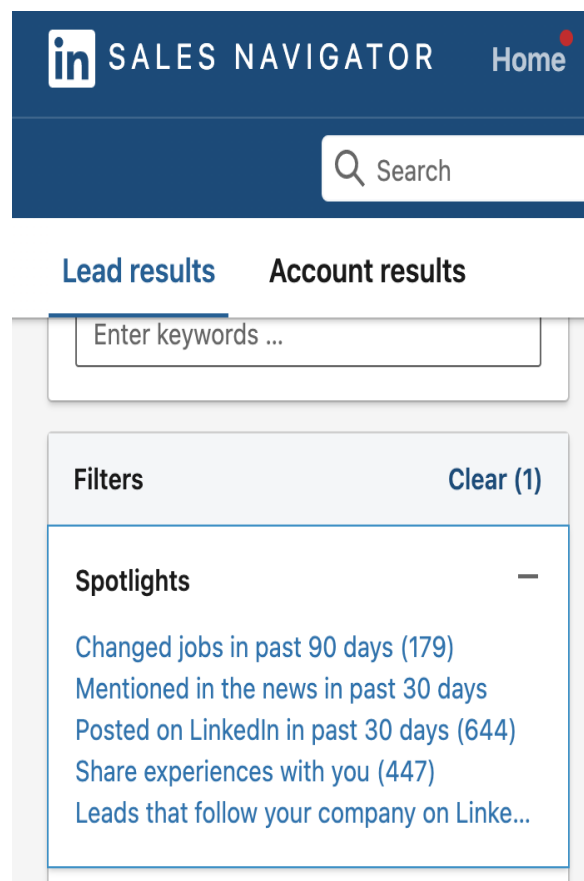
A useful exercise you should do is to write down all your friends, family friends, classmates, co-workers, previous co-workers, acquaintances, and everyone who would know you if you bumped into them on the street. Add these to a list and see who works at any of the types of companies you want to target. These people go on your Tier 1 list.

Tier 1 prospects should also include people who recently changed jobs within the last three months. LinkedIn Sales Navigator has a filter that shows you people who have changed jobs in the past 90 days.

People who recently changed jobs are 2-10X more likely to buy, and so using that filter will allow you to target better prospects. The reason for this is decision makers who are hired are usually brought in to fix problems or take a company to the next level. When compared to prospects who have been in the same role for years, people in new roles are better prospects to target, therefore we give them Tier 1 status.

Tier 2 prospects will be people who are also a fit but they lack any of the characteristics mentioned above. It may feel time consuming putting together the Tier 1 list but it's going to give you better odds of booking meetings.

With your Tier 1 and Tier 2 lists ready, it's time to do outreach. Tier 1 prospects should get personalized messages, while Tier 2 prospects should get a more templated, higher volume approach. We'll go into more detail on what this looks like when we discuss cold emailing. You should call your friends and family on your Tier 1 list. Don't email them.



## Channels To Get Meetings

Each channel below can work. We'll discuss key ones in more detail in the following chapters. You may not have enough time to try them all out.




If you can focus on one or two channels to begin and adjust as needed, that would be ideal. If you're having success with a channel, double down on it. If cold email isn't working, try cold calling. Ideally, you will combine these channels in what is called a sequence. A sequence is a combination of steps across multiple channels.

### Sample Sequence

1. Day 1 View LinkedIn Profile - Take notes
2. Day 1 Cold email - personalized
3. Day 2 Cold call
4. Day 3 Follow up cold email - template
5. Day 4 Cold call
6. Day 7 LinkedIn Message - personalized video using Loom
7. Day 8 Cold email
8. Day 10 Cold email

- **Cold Email**

Cold email works really well for startup Founders targeting B2B companies, especially your typical corporate company and startup companies. You get to target exactly who you want for a very low cost. You'll get feedback on your messages based on positive and negative replies. If you're getting a ton of unsubscribes, you're doing something wrong. If you're booking meetings, you're on track! You'll be able to quickly determine what messages resonate. Cold email also allows you to A/B test messaging as well. The major negative when it comes to cold email is



that everyone uses it so inboxes are full.

- **Cold Calling**


Most Founders will not want to make cold calls. Unfortunately, some customer segments do not respond to any other outreach method. Cold calling becomes required to book meetings. If you're a Founder targeting local businesses, restaurants, and small businesses run by the owner, cold calling is almost always the most effective way to get a meeting. Cold calling works at every size company, but it's normal for a technical founder to want to try other channels first. The reason why cold calling still works is because it's harder, takes more effort, and there are a plethora of tools that make it easy to send hundreds of emails with a few clicks. Prospects are inundated with cold email but receive very few cold calls.

- **LinkedIn**

LinkedIn is often mocked, and rightfully so. However, it is very likely that your prospects are on LinkedIn. You can easily find them. In the past you could send an inMail and probably receive a response. With the proliferation of LinkedIn automation tools, there has been a steady increase in spam messages, and so prospects are dealing with a lot of noise in their inbox. Your best bet is to send a personalized message or try something different, like sending a personalized video using Loom. Voicenotes, only available on the mobile app, is another way to stand out in a sea of spam.

- **Twitter**

Admittedly, I only started using Twitter in the past year for business purposes, but so far it's been great! There are certain audiences that are very active on Twitter. I've found most of my success by leaving thoughtful replies to larger accounts, and shamelessly plugging revpilots.com - I've also received direct messages from people who I did not know and found that to be effective because I don't receive many messages. I ended up taking the meeting with the salesperson, so it does work.



- **Work Your Network**

As mentioned above, you'll want to create a list of all your friends, family, etc. and work your network. If you do not ask them for introductions, you will not get them. Let me repeat, **if you do not ask for introductions, you will not get them.** I cannot emphasize that enough. People are not mind readers, and 99.5% of people are not going to help you out unless you ask first. When you do ask, oftentimes you're going to be surprised by who will help and who will not. There will be more people helping than you'll expect. Don't be shy!

- **Referrals**

If you have any clients, ask for referrals. If you're not sure how to do it, ask one of your customers for a feedback call. Get their feedback. If the feedback is positive, ask them, "Is there anyone you know who would benefit from our product like you do?" or you can see who they might be connected to on LinkedIn (most connections are random) or you can ask them to introduce you to their past company.

- **Communities**

There are Slack groups, Discord channels, private paid communities, subreddits, message boards like Hacker News, and so many more. Join them and add value. *Do not pitch your product!* Follow the community guidelines and *add value*. When the time is right, you'll have an opportunity to offer your product or someone else will recommend you.

<https://standuply.com/slack-chat-groups>

<https://f5bot.com/> - Free - Get alerts whenever your keywords are mentioned on Reddit or Hacker News

I've booked meetings using every method described above, so they can all work. Most recently, I booked \$27,000 in business via a cold email. At my last startup, we got half our clients from LinkedIn. At my current startup, Twitter has been a top source of new meetings. One of the largest deals at an early stage startup I worked for was sourced via a cold LinkedIn message. The deal was over \$400K. The effort you put into each channel will determine your success, and all the channels can work. Remember that every prospect responds differently, so you must find what works best for you and keep at it.

## Prospecting Tips

The more you prospect, the more meetings you'll book, the luckier you'll get. If you don't send any emails or do any outreach, you will book nothing. Now, imagine doing this for 40 hours every week. You'd probably book a good number of meetings, right?

The work you do now always pays off later. Given sales cycles could be anywhere from once month to multiple months, every day you wait to prospect means a day later your deals will close. At some point, you will run out of time to generate new business before the end of the quarter or year. The prospecting work you do today will pay dividends later on.

*Exercise: Block off an hour or two per day to prospect on your calendar*

## Cold Email Best Practices

I'm a proponent of cold email for startup Founders. You can target exactly who you want and get quick feedback on the effectiveness of your messaging. Unfortunately, today cold email is also used by every sales team, which means your prospects are inundated with such messages. In order to cut through the noise and put yourself in a position to succeed, you'll want to follow these best practices:

- Subject Line - 3 Words or Less

The first thing a recipient of your cold email will see will be the subject line. Studies have shown that subject lines with three words or less perform the best. Your goal with a subject line is to have the recipient open the email. It can also be connected to the body of your email. Don't overthink it.

I've been using [Company name], [Company name's] department I'm targeting and "my company name" as subject lines.


Example subject lines: Stripe, Stripe's Marketing Team, and RevPilots

Your goal with your emails should be to get a 40-60% open rate.

- Personalize the first sentence

After seeing the subject line, the sender's name (you can't do much about that besides making sure you have a professional email domain you're sending from), a prospect will see the preview of your message. You should personalize that sentence. If your recipient is using a browser, typically they will see about ten words, assuming they're using Gmail. On their mobile phone they'll see around three words. *You do not want to waste this precious email real estate on fluff or introducing yourself.* This first sentence needs to get the recipient to read the rest of your email.

When personalizing the first sentence, you'll want to do about five minutes of research. Look them up on LinkedIn. See if there's any relevant information. Google



them to see if they're on Twitter, have been featured on any Podcasts, or have been mentioned in the news. Show them that you've done a bit of research. Most people do not receive personalized emails. Connect that artfully to the rest of your email.

- Don't talk about yourself

Founders quickly learn that prospects do not care about their product, where they went to school, what awards they won, or the amazing technology they're using. Too often they want to tell a prospect how great they are or how great their startup is. Nobody cares. At all. **Prospects only care about themselves.** They want to know how you benefit them. How you solve *their* problems. They want to *learn* something.


- Balance quality with quantity

Cold outreach is a numbers game. No matter how good your email is, some people will never respond. You need to make sure you spend time personalizing for your Tier 1 list, but you also need to make sure you're sending enough emails and not spending too much time writing them. Try to keep it to 5 minutes of preliminary research and 5 minutes to write a high quality email. The more you do it, the faster you'll be able to churn out personalized emails that don't feel formulaic, but also won't eat up too much of your prospecting time. Templated outreach is fine but you need to make sure your templated messages are relevant to the lists you're building. Creating templates tailored to job titles or industries is a way to send better messages.

- One pain per email

There's no need to mention everything your product can do in one email; you should not write emails that mention multiple pains or problems. Pick one pain to focus on per email and stay on topic. You can use follow up emails for other pains you solve for. Make the email about the pain and how it affects your prospect.

- Generate Curiosity, Lead with an Insight, Capitalize on an Insecurity



Often Founders want to tell their prospect everything about their product. They dump an 'About' page into the email, but it's okay to remain a bit mysterious and let your prospect become curious. Fight the urge to overwhelm them with details. If they need more information, they will either ask you or go to your website. Leading with insight is a great way to establish credibility while teaching your prospect something they may not already know. Making your prospect a little insecure may seem challenging or counterintuitive, but an easy way to do that is to ask, "how are you ensuring that x" - x being a problem your product will solve for. An example could look like - "How are you ensuring that your marketing team is generating enough qualified leads?" for a startup that helps marketing teams generate qualified leads.




- Follow up emails are key

The money is made in the follow up. In my experience, most of my meetings are not booked on my first email. It's the second email that I'm sending as a follow up where I book most of my meetings. Following up is key for everything sales related. If you're not following up on cold emails, you're leaving money on the table. Don't feel like you're being pushy by sending a follow up email. If you spent time personalizing the first email, you should have no issue following up. People receive a lot of emails; a follow up email can often be the difference between securing a meeting and getting no response at all. Worst case scenario is the prospect doesn't reply or tells you that they're not interested.

- Apples to apples social proof

Social proof was coined by Robert Cialdini in his 1984 book Influence. It's a psychological and social phenomenon wherein people copy the actions of others in an attempt to undertake behavior in a given situation. When using social proof in cold emails, you need to make an equivalent reference. What that means is if you're selling to a small business, the social proof should be of another small business. Using a large company as social proof to try to book a meeting with a smaller company will not be effective. Prospects want to know similar companies





benefited from your offering. If it's not an apples to apples comparison, they'll assume it's too expensive or the product isn't built for their particular needs.

- Multiple emails over two or three weeks

Earlier we discussed sequences: You can send multiple emails to prospects over two or three weeks. Although response rates decline with time, you will book meetings on your third, fourth, fifth, and so on, emails.

- Write for mobile

When someone opens an email on their phone, they're not going to want to scroll. Make sure your email fits without requiring someone to scroll. Don't underestimate the power of using white space! Design your emails so that the readers' eye naturally looks towards the most important points you want them to take away.

- Keep it short

Cold emails need to get straight to the point. Keep your emails between 3 or 4 sentences. There are times when longer emails are necessary and appropriate, but that will be when you have high value information for personalization.


- Write like you speak

Remove the fluff. You would never say, "Hope all is well" in person when meeting someone. Read your emails aloud. If it sounds rigid, too salesy, or filled with jargon, delete it.

- Soft calls to actions perform well

In the past, you'd ask, "How does 4pm on 12/22 look for a call to discuss x?" Now you want to use what are soft calls to actions like, "Open to learning more?" or "Interested in learning more?"

- Offer a training session or something of value



An effective way to get in front of prospects is to send an email talking about a topic you know really well. Provide an insight by writing an email where the recipient learns something. It's even better if you can connect it to their team in some way. Two days later, send a follow up email offering a training session or workshop on that topic at no cost. Let them know there's no charge or catch. This works because you're offering something of value with no strings attached. In order for this to work, you'll need to put together a training or workshop on a topic that lasts about 20-25 minutes. If you put on a good session, you'll establish yourself as credible and trustworthy. Naturally, prospects will want to know more about you and your startup.

Prospects are not stupid; they know you're a startup that wants to sell them something. Often, the senior person who scheduled the meeting will ask you about your company at some point during the session, or they'll thank you and schedule time with you in the future. I know this because I scheduled dozens of high value meetings at my last startup with this approach. I was able to get clients, establish myself as an authority on the topic (that was related to my startup), and build my network. To this day, I still have good relationships with some of the senior leaders at these companies, because I helped them and their team for free. The training session I offered was of high value, and multiple times I was offered \$5,000 or more to host another session. You need to put something together of value that people will be willing to pay for. If you can do that, you'll open up sales conversations with decision makers who will want to help you. Even if they don't buy from you, you will be building up your network, and they may even refer your business to others.

- Your goal is to book a meeting

One thing a lot of people who are new to cold emailing do is try to sell their product via their cold email. **The goal of cold email is to book a meeting.** *That's it.* You do not need to do more than that. This is exactly why you want to create curiosity, pique interest, lead with an insight, and so on. Too many people try to tell the prospect everything at once, and as we've already established, this can be overwhelming or seen as disingenuous. In other words, selling in a cold email violates a couple best practices explained above. Remember, your goal is to **book a meeting.**

## Real Message Examples

Below are two LinkedIn messages but you'll get an idea of how personalization works. It's no different for LinkedIn. Here's a prospect's About section that has some unique information that shows their personality, tells a nice story, and gives you plenty of info to leverage for personalizing outreach.

### About

A few years ago, I was standing on top of an active volcano ready to take the plunge.

While I was hiking up, I thought about turning back every 5 minutes or so. The rocks were huge, the terrain was treacherous, and my calves were on fire. I was so ready to get back to the hostel and pass out in the hammock, but I pushed through. I kept going until I was at the top of Cerro Negro, goggles on my head and board in my hand. 28 seconds later, I was at the bottom of the volcano very much alive and very much covered in volcanic ash.

Now, I put that same tenacity to work as Director of Sales at [REDACTED]. I don't have to climb any volcanoes, but I do have to put out a lot of fires.

If I can help you in any way (or you want to hear more about volcano boarding), send me a message. You can also follow me on Instagram where I mostly post photos of my wife and our pets :) [REDACTED]

In my message below, I used "Cerro Negro" as my subject.

MAY 15



**Joe Benjamin** • 2:55 PM

**Cerro Negro**

Hey Ashley,

The same way you struggled up Cerro Negro, salespeople struggle everyday with an uphill battle to personalize outreach because they don't have enough time effectively research their prospects.

We've built a solution that helps salespeople put on their goggles and cruise through researching so they can more effectively personalize their outreach. (without the volcanic ash)

Let me know if you'd like to learn more, we might be able to help you put out some fires.

Best,

↓ Latest message

[www.revpilots.com](http://www.revpilots.com)

It's immediately clear to the prospect that this is not a templated message. It's personalized and likely very different from what she normally receives. With a personalized subject line, I'll have an above average chance to get an open on my message.

Subject lines matter because people get a ton of messages and it's the first thing they'll see in their LinkedIn inbox. Don't overthink the subject line but try to make it stand out. Do not write "Web Development Services for Company X" - That's so easy to delete and opening that message is going to be a waste of time. You know what's coming after that. Do your best to create curiosity. Make people want to click to read your message.

Back to the message, below. I was able to personalize my message and connect the value proposition of what my product solves (save time researching prospects to make personalizing outreach easier) to a unique experience that my prospect told the world about on LinkedIn. I connect the struggle she has climbing Cerro Negro with the struggle her salespeople have personalizing outreach. Connecting those two pieces of information is a bit of an art and takes time to get good at. The more you practice doing it, the better you'll get.

In my message, I have four points of personalization to point out.

- 1. Cerro Negro**
- 2. Mentioning the uphill struggle**
- 3. Volcanic ash**
- 4. Put out some fires**

 3:08 PM

Well done!! Love this note and how personalized you made it. I am struggling with not having enough time to personalize my outreach.



**Joe Benjamin** • 4:28 PM

Thanks. Sorry for the delay in getting back to you.

If you want to hop on a call next week to learn more about how we might be able to help you personalize your outreach faster, Tuesday and Wednesday afternoon are wide open

 • 4:37 PM

I'm moving next week so it will have to be the week after. How about the 26th

## Meeting booked!

When I sent the message, I knew I had a really good shot of getting her to agree to a meeting. The message was highly personalized, creative, succinct, and definitely stands out because most messages on LinkedIn are garbage and email inboxes have tons of templated junk. The bar is low. Remember, if you put in the effort to do a little research and follow best practices, you'll get meetings.

If you're inexperienced writing cold messages, you must remember that you do not need to say everything in your message. **Your goal is to get a meeting, not tell them everything about your company.**

Your prospect doesn't care about you. And that's correct. There is an exception. If they make it known that they have a problem or demonstrate interest in something that you specifically solve, you can share a bit more about yourself because it's fair to assume it's highly relevant.

The below example was cold outreach. To give you background on what I did before I sent the message, I used the LinkedIn content search for keywords that might show relevant LinkedIn activity and came across a post that my buyer persona was commenting on. I also commented on the post and “liked” the comments of a few people who were in my buyer persona. Prospects viewed my profile because I was a second degree connection liking their comments and people are naturally curious to see who gave them a like.

After the comments and likes, I wrote a message. Below is the message I wrote.

**Joe Benjamin** • 4:34 PM

## **Research**

Hey Michael,

Saw you tagged your team on Doug Landis' post related to DEF14a and couldn't agree more that everyone in enterprise sales needs to be leveraging SEC documents.

How are you ensuring your team spends the necessary time to find the golden sales nuggets in 10-Ks, earnings calls, and other SEC docs?

We've built a solution that helps enterprise salespeople find golden sales nuggets not just in the SEC related material but in podcasts, news, job postings and more, with just one click.

Here's a short demo video...

<https://www.loom.com/share/30bb44d1ded94734b3412a0f192>

If you'd like to learn more, let me know when you have 15 minutes this week.

Best,



Michael [redacted] • 6:58 PM

I have time Thursday morning eastern time zone.

Let's review the message...

**Subject line** - Relevant to the theme of the post.

**First line** - References their recent activity, personalized opening sentence. Clearly not templated.

**Second line** - I'm creating insecurity that relates to the value prop of my product.

**Third line** - Given that the post he tagged his team in was about using some hard to find, niche financial document for sales research, I knew I could mention what we did because I knew the pain of research was that sales people don't do that kind of research. It's a time consuming process and they don't even know where to find it.

**Fourth line** - I doubled down by sending him a quick 30 second video of what we do (bonus points if you customize this video using Loom or Drift).

**Fifth line** - soft call to action

**Meeting booked!**

If you follow the cold email best practices and commit an hour or two a day to writing cold emails, you'll book a ton of meetings.

*Exercise: Write 10 personalized emails today*

## Cold Calling

Founders hate cold calling because it's hard work, most of the time you're dialing to voicemails, and when you do connect with someone you can face brutal rejection. They also say things like "I'd prefer to email instead of interrupting their day."

Tedious work is a given when prospecting and rejection is guaranteed in sales. As far as interrupting is concerned, if you reasonably believe you can help a prospect solve a problem or eliminate a pain, some people will be happy that you called. If what you are calling about provides a solution to a problem, it will not be considered an interruption.

Cold calling is very much a numbers game. You can reasonably expect to make 80 calls and have 2-4 conversations which may lead to one booked meeting. Depending on your prospects, you may have more conversations.

The goal of a cold call, much like cold emailing, is to book a meeting. There will be times when the person on the other end of the line is free to chat and open to learning more about your solution. But for the most part, your goal is to book a meeting.

When making cold calls, don't spend time researching the prospects. Just dial. A common mistake junior salespeople make is to spend too much time on research before dialing. What usually happens is that nobody answers.

As mentioned earlier, some prospects will only respond to cold calls. For local businesses, restaurants, and small businesses run by the owner, cold calling is almost always the most effective way to get a meeting.

If you want to be more strategic with cold calls, you can call prospects who open your emails multiple times. These will still be cold calls, but your prospect may be a little bit warmed up.



Cold calling is very much about pitching what you can do to benefit the prospect. You'll do most of the talking, with the goal of securing time on the calendar in the future for a proper intro call.

A cold calling script you can use.

*Hey [name] - This is Joe Benjamin with revpilots.com.*

*How have you been?*

*[name] Calling because competitors like [X] are using RevPilots to [solve problem] -*

*Does it make sense to give you more detail about how we [solve problem]?*

If they say yes, you can ask them if they have their calendar in front of them. If they do, suggest a date and get the meeting booked. Ideally you get the meeting invite sent and accepted while they're on the phone.

If they ask you questions but don't agree to a call, have a conversation with them. Educate them. And ask again for a time to chat in more detail.

If they say they're not the correct person, ask them who you should be speaking with.

The best times to cold call may depend on the industry. Calling restaurants means avoiding their open hours. You need to call between meal service or first thing in the morning.

Calling people with gatekeepers is always tough. Respect gatekeepers! They have a lot of power. You can try getting around gatekeepers by calling before and after normal business hours.

When it comes to leaving voicemails, you should leave them without any expectation that you'll get a call back. I would consider them more of a touchpoint. You can mention you'll be following up with them by email and or you'll be calling back tomorrow.

*Exercise: spend one day making cold calls. That's all you do. Nothing else.*

## LinkedIn

As mentioned earlier, we got about half of our clients at my last startup using LinkedIn. It was so successful that I wrote a different book on how to do it! In this book, I'll provide you with some tips and tactics on how you can use LinkedIn to your benefit to book meetings, drive traffic to your website, and get clients. Email me if you want "The LinkedIn Guide To Booking More Meetings."

Like most things, the more work you put into it, the better results you'll see.

You may already be aware of certain aspects of using LinkedIn, however some things you may not know are about gaming LinkedIn's algorithm, LinkedIn Pods, and how to leverage the Reciprocity Principle.

- **Post Consistently**

It's a pain in the ass to post on a regular basis, but it's key to building a following. This is hard - I struggled with it for a variety of reasons. Knowing what I know now, I would have dedicated more time to LinkedIn instead of testing other channels because our buyer persona is active on LinkedIn. And I would have created a content calendar and spent less time thinking about what I posted in order to ensure I was active most days. This is the hardest part, but even if you're not posting 5 days a week, you can still get leads and clients. Create a content calendar!

Here's a list of LinkedIn post ideas: <https://revpilots.com/linkedin-post-ideas/>

- **Be Known For Something**

Build a personal brand on LinkedIn - It's not complicated to do. Post about whatever your niche is and what you know well. You should be an expert on something, so make sure to let the world know. Give away your expertise, and remember, even the basic stuff you know has value! The 101 knowledge may have wider appeal than the more 401 stuff. Don't overestimate your prospects.

- **This Is Key to Remember (and will help you in all aspects of sales)**

Nobody cares about your business; they care about themselves and only themselves. Once you realize that the person on the other end is self-centered when it comes to sales interactions, and rightfully so, this will help you approach things so you benefit them, making it more likely for you to close, and causing rejection to sting a little less. Never connect with someone and immediately pitch them. Ever! It's not effective and it shows you only care about yourself.

- **Gaming LinkedIn's Algorithm With Your Posts**

LinkedIn cares about "dwell time" on posts in the feed. The longer people spend reading your posts, the more they'll get promoted by LinkedIn. This means writing a post with a hook before the "see more..." button to get people to click "see more.." You should write the post so it's spaced out line by line. Some call this "broetry" but it works, and longer posts usually perform better.

If it makes sense, ask a question or have a call to action (CTA) at the end of the post to drive engagement. Limit the number of links, having a maximum of two links, although none is ideal. LinkedIn wants people to stay on LinkedIn, so it's better to add a link in the comments after you post, or edit the post after it's live and include a link in the body. Likewise, limit the number of hashtags you put to between three and five. I prefer to select hashtags with large followings that my buyer persona would follow. Posts that you "share" do not perform well, so it's better to post the original. Video doesn't perform as well as text posts, in my experience, but you may be better at creating video content than I am. I'm not certain video gets penalized, it probably doesn't, but it can be harder to create high quality video content that stops people from scrolling, they watch, and engage with it. Last, always respond to and like the comments.

- **Profile Basics**

Make your profile a landing page more than a resume. Leverage the featured section with your two best items, ideally short demo videos. Your headline should not be your job title, a formula you can use is I help X with Y by Z, with Z being what differentiates you. Example: I help Founders close more business by connecting them with vetted fractional sales talent. Get a decent profile pic. This means you should have a professional headshot or at least a high quality photo. Most B2B buyers will check out your profile before buying.

- The Reciprocity Principle is powerful!




Do giveaways related to your expertise or offering. At CheetahIQ we built a search engine designed for B2B salespeople. I would post on LinkedIn an offer for "free research reports" (using our own product), then our buyer persona would message us asking for a free research report. This was a worthwhile giveaway because we gave away something people would pay for. Then, after we sent the report, they would ask us how we did it, if they could get a demo, sign up, refer us to a decision maker, or simply thank us.

Some of the people who thanked us ended up becoming unofficial ambassadors, tagging us in posts and recommending us to other customers. What's something you can give away that's related to a problem you solve?

[https://en.wikipedia.org/wiki/Reciprocity\\_\(social\\_psychology\)#The\\_power\\_of\\_reciprocity](https://en.wikipedia.org/wiki/Reciprocity_(social_psychology)#The_power_of_reciprocity)

- **Repurpose content**

You will post text statuses that do well. You can turn those into mini guides and use them as giveaways in the future. This can also be turned into blog posts, tweets, etc. You can also re-use LinkedIn posts. In fact, two statuses I posted turned into blog posts which ended up ranking in the top 3 on Google. I used Canva to create my assets. You can make a guide using Canva that people will value in 5-10 minutes.



Do not spend a ton of time making it. The content is more important than the design. If your content has value, then your design will be good enough. Get it done and get it posted!

- **Build Your Network**

I prefer not to write messages when adding people because most people will accept based on your profile, not your message. If you can write a quality, personalized message, then go for it, but the ROI is not there, in my experience. Add people on a regular basis who fit your buyer persona. Additionally, write thoughtful comments on posts by people in your industry who have high engagement. You can also "follow" people and engage with their content. This is a good way to build a genuine connection. Finally, add people who engage with your posts.

- **Some LinkedIn Truth**

Despite what they may say, a lot of the "thought leaders" used LinkedIn pods early on to build a following. They did post consistently but they helped each other out or used random pods. To this day, people who get ridiculously high engagement are liking and commenting on each other's posts. You can post your status in a few groups/slack chats that are relevant to your space. They often have channels for this exact purpose.

I won't name names but there are people now who get hundreds, sometimes thousands, of likes because they got started this way. Lame content does well, unfortunately. The guy who interviewed the homeless, drug addict who didn't shake their hand during the interview but is now the CEO gets a lot of likes and comments, probably tens of thousands of views. That's good for exposure, but not necessarily for your business. Highly engaged niche audiences are much more valuable.

- **Your LinkedIn Competition is Noise**

The feed is filled with shitty posts and inboxes that are filled with pitch after pitch. NEVER pitch someone right after you connect - it's a terrible way to do business. If you want to message someone, personalize it (you'll stand out), or provide them something of value without asking for anything. Always play the long game.

LinkedIn Sales Navigator is worth it for the search functionality, but not the messaging feature. The LSN messages are worth close to zero. They just don't convert into meetings. So I wouldn't recommend buying it if you wanted to send more messages. The search functionality allows you to filter by all the required criteria you need to build your prospect lists.

- **Other things...**

Make your profile public so you get a touch point when you view someone's profile. There are tools to automate viewing of profiles that violate linkedin's Terms of Service but can be worth it to drive views back to your profile. People will be curious about who this "Founder" is when they see you viewed their profile. They may visit my profile, read a bit about me and my company, view my featured items, and go to my website. LinkedIn was the #1 referral source of web traffic for my last startup.

*Exercise: Turn your LinkedIn profile into a landing page and create a content calendar for LinkedIn posts.*

## Creative Outreach Ideas

Committing time to cold emailing, cold calling, and social selling will get you meetings. Unfortunately, salespeople have all sorts of sales engagement tools they use to fire off hundreds of emails and dozens of LinkedIn messages with just a few clicks. This can make it harder to connect with your prospects, as they are inundated with cold emails, LinkedIn spam, and sometimes even calls. Plus, prospects are busy. Standing out with a creative prospecting technique can be a differentiated way to book meetings that should be saved for high value Tier 1 prospects who you haven't been able to reach.

- **Venmo**


By sending a small amount of money, you'll get the attention of your prospect. Since Venmo is a mobile app, your prospect will receive a notification on their phone. You're able to include a message which can act as a touchpoint.

Of course there are drawbacks to using Venmo: Some prospects do not use Venmo, some will find it invasive because this is their personal account. But without any risk, there is no reward. Note that this tactic is very bold.

- **Use Piñata Farms**

Piñata Farms is an app that allows a user to easily create meme videos; these types of meme videos are almost never used in sales. The reason this will work well is because 95% of prospecting outreach are emails and calls. A customized video will get their attention and characterize you/your company as unique.

Piñata Farms enables someone who has no video editing skills to use their creativity to quickly and easily design a meme video. You can grab your prospect's face from their LinkedIn profile and add it to a video or a gif. Or you can use text based editing to more interestingly convey how you can help.



If your prospect has a sense of humor, and you do this correctly, you're going to stand out. If you stand out, you'll have a better shot of booking a meeting.

- **Use Reface**

Like Piñata Farms, Reface makes it easy to create meme videos and gifs. Although this app was never intended to be a tool for sales prospecting, it can be used to cut through the noise. If your traditional methods of outreach are not working, you will need to get creative.

Reface can be a tool that you add to a step in your outreach sequence when you're not getting the results you want. It can be time consuming to find the right celebrity or gif to replace your prospect with, and it may be a bit unnerving to send this. However, if you can find the appropriate clip to use in your sales prospecting, it can be extremely effective.

- **Use A Picture Meme**




The internet has been taken over by memes because they're a quick way to convey a multilayered message. If you're writing personalized emails, making calls, and need to find a way to get your message to your prospect, a standard meme can help you book a meeting. You could even add it to your cold email campaigns. Like the other ideas, if your prospect is getting tons of text emails all day, this will make it so you stand out.

The challenge with memes is they will fall flat if they're not interesting, creative or relevant. I have posted memes on LinkedIn that drove inbound leads, but not everyone has the talent to make a text meme. Unlike Piñata Farms and Reface, image memes have less depth and some people will simply not understand what you're trying to say. There are many free sites that make it easy to create memes.

- **Send A Cameo**

If you're not familiar with Cameo, it's a marketplace where you can buy customized celebrity shoutouts. You can select a celebrity across a variety of





categories from former professional athletes, to television stars, to D-list celebrities, and have them say something in a brief video clip. You're then able to send this to a sales prospect. It's probably the best creative sales prospecting idea, because it's customizable and personal.

If you do a little research on your prospect and figure out they like the Dallas Cowboys, you can find a former player and have them send a message on your behalf. Using sites like Twitter, [LinkedIn](#), and Facebook can help you figure out what your prospect likes. If it's a top sales prospect and you can't find anything, I would recommend you reach out to someone on their team to see if you can gather any intel. The reason you need to do research is because Cameos are not cheap. They can range from \$10 to hundreds of dollars per video. The other tools mentioned are free and can still be quite effective.

Another thing to remember about using Cameo is that there will be a lead time. Unlike the other sales prospecting ideas that can be made in as little as five minutes, Cameo can take days to receive your finished video. Make sure to factor this into your timeline.

These creative ways to prospect are all ideas that can work because you're doing something different. When every other SDR and Founder you're competing with is Zigging, you want to Zag. **Standing out is critical.** You may find that Venmo as a creative prospecting idea isn't working, but that doesn't mean that Cameo or Piñata Farms won't. Make sure to try them all. Like anything that's different, you have to figure out what works for you.

Keep in mind that a lot of your success will originate in the research you have done on your prospect, so the creative prospecting technique you decide to use is relevant. Finding something that is personal to your sales prospect, and then connecting that to one of these creative sales outreach ideas is going to be key. And it's going to take more time than it normally would to create a meme or use Reface than it would to write a cold email or make a cold call. Make sure that you are using your time wisely!

- **Gifting**

A few years ago when most everyone was still working from an office, we sent a few hundred bucks worth of cheesecakes to prospects and clients. We selected Eileen's Cheesecakes, a local NYC cheesecake place, because it was near our office and our prospects were across the country. This resulted in hundreds of thousands in new sales opportunities. **Gifting works.** There's a reason why gifting platforms like Sendoso and Alyce are doing well. Gifting can be too expensive for early stage startup Founders, but it's absolutely worth considering if you can afford it. Remember, you also need to send a personalized message that's connected to the gift in some way.

- **Direct Mail**

Write a note and send it via a FedEx envelope. **FedEx envelopes get opened.** The challenge now is to acquire the address of your prospect with so many people working from home.

- **Book Summary**

Write a book summary of a non-fiction book that provides a lot of actionable advice which is relevant to your industry. Every industry has books that people in that industry should read, and they know that they should read it. Despite this, reading often takes more time than the average person is willing to spend. Read the book and take detailed notes, providing your prospects with all of the essential information but without having to spend hours finding it themselves. Feel free to include your own commentary, though that is not always necessary.

Message prospects asking them if they'd like to receive a summary on X because it will help with Y (X being the book, Y being something the book should solve for). Try to connect it to their role or department in some way. This is a touchpoint you can use to build connections with prospects before you ask them for anything. I did this in the past to build a network of new connections, and I opened up sales conversations with new prospects as well.

Here's a real example of the book summary tactic. I searched for the book on LinkedIn and saw she had posted about it. With my LinkedIn profile showing a demo video of my product, it wasn't surprising she looked at my profile and saw the demo video.



**Joe Benjamin** • 6:19 PM

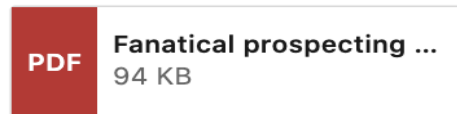
**fanatical prospecting!**

Hey [redacted],

I came across your post about Fanatical Prospecting and thought I'd share my notes. See attached.

Best,

Joe  
Co-Founder  
[www.cheetahiq.com](http://www.cheetahiq.com)



[redacted] • 6:40 PM  
Wow thank you!

**Joe Benjamin** • 6:43 PM  
No prob! Hope they don't have too many typos

[redacted] • 6:44 PM  
I'm actually covering the book in my staff meetings ... I have it on audible, we listen to one or two chapters and then talk through it and how it applies to our world.

**Joe Benjamin** • 6:46 PM  
Very cool. It's a helpful book, especially on a conceptual level.

[redacted] • 6:57 PM  
So now my question is, how do I get my sales people access to your product? :)

## When Should You Use a Creative Sales Outreach Idea?

There's no right or wrong answer to this question, and what is right for you will depend on your circumstances. If you're not personalizing your outreach and getting good results, it's probably not worth your time.

Use it when you have a high value prospect you can't reach:

- **If you have a high average contract value, it's worth trying if you're not hitting your numbers. Given the time it can take and potential cost with something like Cameo, the ROI has to be there to justify this as a creative prospecting technique.**
- **If you haven't been able to get a reply from a high value prospect.**
- **You're in a competitive space and sell an undifferentiated product.**
- **A prospect has gone cold.**

*Exercise: Select 5 high value tier one prospects you haven't been able to get in touch with and try a creative outreach idea.*

## A Simplified Sales Process

This is a simplified sales process. It's very basic and I want to emphasize that. It's possible yours is more complex and involves more decision makers. However, for purposes of understanding how this could look, we're keeping it simple.

1. Meeting One - Intro Call
  2. Meeting Two - Demo Call
  3. Meeting Three - Proposal Call
- **Intro Call (Discovery)**

After a prospect has agreed to meet with you for the first time, you'll have what is called an Introductory Call. This is your first call, which is usually calendared for thirty minutes. It is very unlikely you will get more time. Don't worry, though, as thirty minutes is plenty of time to determine a mutual fit.

During an introductory call, also sometimes called a discovery call, you will determine if there's a mutual fit for both you and the prospect. You'll understand what their pains and problems are with the goal of moving them to the next step in the sales process, which is usually a product demonstration.

The first call you have with a prospect is arguably the most important call in the entire sales process. Ideally, you'll come to understand their pains and problems. You'll learn as much as you can about their company, their goals, their role, their buying process, what problem needs to be solved, why that problem should be solved, why that problem is time sensitive, what happens if that problem isn't solved now, and more.

Although you'll be asking a lot of questions, you'll need to make sure this is conversational. Make sure you don't sound like a reporter doing an interview or a detective questioning a witness. Remember earlier when I said you need to think of yourself as a consultant or business doctor? **This is when you do that.**



- **Pre Call**

Before your call you need to prepare. Pre-call research is important to establish credibility and not waste time asking questions you could have learned about with basic research. Look up the location of the company, the profiles of the people you're meeting with, review the company website, review their headcount, etc. You want to do research so you can bring it up on the call to make yourself look more credible when necessary.

It's also important to look at the role of the person you're meeting with.

All this research should take about five to fifteen minutes. Jot down some notes so you have them handy for the call. Additionally, you'll want to go into the call with questions you'll want to ask. Make a list of these where you wrote down the notes.

- **Call starts**

At the beginning of a call you want to spend a couple of minutes building a good rapport. Try not talking about the weather; if you found something interesting during your pre-call research it might be worth artfully mentioning. Remember, this is a human to human conversation. After the rapport building is over, explain the purpose of the call, what you'll be discussing, and that you'll leave time at the end to discuss next steps. This is called an upfront contract. They'll agree. It's also useful for new salespeople to set an agenda. You have to remember that you're in control of the sales process: you do not want to let your prospect suggest what to do next.

- **Questions To Ask During Discovery**

At a basic level, you want to ask more open ended questions. These are questions that cannot be answered with a yes or no. They require a prospect to provide in depth answers. You wouldn't ask "Do you have a problem with X?" you'd ask, "How has X affected your business?"

Open-ended questions provide better answers. If your prospect is talking, you'll get more information, and if you get more information you can align your solution

more effectively during a demo call. Open-ended questions are also just better for generating engagement and quality conversation. You want to make sure to build on the good rapport you have already established.

When starting a call off, I like to ask, “Just out of curiosity, you get a ton of outreach from people like me all the time, what made you take today’s call?” - This question is great to ask for non-sales Founders to kick things off because often prospects will tell you exactly why. Now, you will not have to play the question game to understand their motivations for being on your call today. They often say, “We’re looking to solve X and it sounds like you might be able to help,” or they’ll say, “I liked your email and I’m always open to talk to new vendors.” The latter isn’t the greatest response, but at least you know that you are facing an uphill battle.


I also like to ask, “Can you help me understand [topic related to problem you solve]? - For example, we were working with an employee benefits company helping them with discovery and we’d ask, “Can you help me understand how you’re currently solving for your employee retention challenges?” This type of question provides a ton of information.

On a related note, asking questions that demonstrate your expertise (remember you’re a *consultant*) will add to your credibility and trustworthiness. I put together a list of discovery questions below in the section called “**Discovery Question Examples and Call Structure**”

- **Discovery Tips**

You want to have a conversation with your prospect like you would with a friend at a bar. You need to listen. Good discovery calls show that the prospect speaks for about 50-60% of the time and the salesperson speaks for about 40-50% of the time. If you’re doing all the talking, it’s going to go poorly.

How do you ensure you’re not talking too much? Ask good questions. You need to actively listen. When listening, take detailed notes. Prospects will ask you questions and you’ll need to provide succinct answers. *Do not add unnecessary context.* Do not go off on tangents or speak in long monologues. If you find yourself



talking for more than a minute, try to stop. People will lose interest, they will tune you out. And more importantly, if you're talking too much, you will not be able to get sufficient information from the prospect.

Good salespeople are good listeners; prospects who feel heard are happy prospects. When a prospect mentions a relevant problem, you can tell them a story about a prospect who faced a similar problem. But before that, you want to confirm that you heard them correctly. You can do that by saying things like, "It sounds like..." or "It seems like..." If prospects know you're listening to them, they'll be more likely to believe you are able to align a solution with their specific needs.

Asking questions is critical, but you want to spread your questions out over the call. Remember, this is supposed to be a conversation, so you don't want to jump around to different topics. A basic example could be, if they mention something like "Recruiting has been a problem," you want to drill down on that with questions like these: "You mentioned recruiting has been a problem. Can you explain in more detail why recruiting has been a problem for your business?" "How has that impacted your business? What happens if you don't solve this problem?" and "What have you done to try to solve this problem, or what are you considering doing to solve this problem?"

Stick to the topic and drill down; find out as much as possible. If you have a solution that helps with recruiting and two minutes in they mention that recruiting is a problem, there's no need to mention your solution yet. Get more information so you can better align it with their needs. In other words, *personalize* the solution to the prospect. Once you understand their problems, how they're impacted, and you understand their problem well enough, you can mention how you help. Think of the doctor analogy earlier. If a patient comes in and says they have back pain, but only a little information, you could make a diagnosis and prescribe a treatment that may be on point. Or you can get more info before you suggest how you can help and *ensure* you're on point.

Stick to two to four topics during a discovery call. If you cover more, you risk spreading yourself too thin, therefore not going deep enough into detail or



demonstrating your knowledge/expertise. Based on the time it takes to answer questions, you usually want to ask ten to fourteen questions per discovery call. Too many questions is uncomfortable for the prospect. Not enough means you won't learn about their problem and company.

With only thirty minutes for a discovery call, you need to leave two to four minutes at the end to discuss next steps. It's important to watch the clock during your call. If you think you can help the prospect, you want to schedule next steps (usually a product demo) while they're on the call.

- **Scheduling next steps**

*"We only have a couple minutes left. Based on what you told me, I recommend I show you a demo on how we can solve X (X being the problem you discussed). How does that sound?"*

They'll probably say yes if the call went well. Ask them to pull up their calendar and suggest a date and time. Confirm the date and time with them while they're on the phone, and send over the calendar invite immediately. Do not wait to send the invite!

## Discovery Question Examples and Call Structure

Below are questions you can ask. This is not comprehensive and everything you ask should be customized to your sales process.

- Intro (1-2 minutes)
- **Build Rapport**
  - Optional: Reference something showing you have done your homework
    - (News, awards, something from their LinkedIn)
- **Structure Call - “Upfront contract”**
  - “Today we’re going to see whether our product is a strong fit for you. That way, if you go further in this process with us, you’ll know it’s time well spent. If I see that it’s not a great fit for you, I’ll be upfront about it so we both save time. Is that fair?”
- **First Discovery Question**
  - “Just out of curiosity, I know you get a lot of meeting requests, what made you take today’s call?”
- **If they mention a problem→ Dig in!**
  - “Can you explain to me how you see this as a problem for your organization?”
  - “Can you describe how you are trying to solve this” or “can you walk me through the different approaches you’ve taken to solve X?”
  - “What are your goals, or what are you hoping to achieve by solving this?”

- “Can you help me understand what you hope to achieve by signing up for or rolling out [product category] to your team?”
- “What happens if you don’t solve this problem?”
- “How much of a priority is it to solve this problem? Or “Where does solving X sit on your priority list?”
  - “What do you think will happen if this doesn’t get solved?”
  - “Who is this problem impacting at [company]?”
  - “What does your timeline look like to solve this problem?”

- **If they don’t mention a problem → Ask About How They’re handling a Problem you believe they might have**

- “*When it comes to Problem X, what types of challenges do you face?*”
  - “What have you tried to solve Problem X?”
  - “How has your company been impacted by Problem X?”
- “Can you describe any examples of Problem X?”
  - “What have you tried to help improve Problem X?”
- “With [data or insight about the problem], how have you navigated this challenge?”

- **Future state**

- “Can you describe to me what change(s) you’re hoping to see in the future if you implement something like [solution]?”

- **Evaluation**

- “When evaluating a new partner, what is your criteria?”
- “What’s the most important thing when considering a new solution?”
- “Who needs to be involved in the buying process?” or “Who would feel left out if they weren’t on the next call?”
- “Was there anything you saw or heard about from other vendors that you didn’t see today that we’ve missed?” (also can be used in demos)

- **Next Steps (2-3 minutes)**

- “Based on what we’ve discussed today, I would recommend we walk you through our product to show how it could help solve for X. Do you have your calendar open?” followed by “How does next week look for a call?”
- “Great, and you mentioned earlier that Joe and Steve need to be involved in the decision process. Should we invite them to a call?”

This is not a comprehensive list of questions. You will need to customize them for your sale.

- **TIPS**

- You want to **label what they say** so they hear you’re paying attention:
  - It sounds like X is a major challenge (summarize why).
  - It seems like this is a priority because of Y (summarize why).
- **Use social proof**

- Mention how other clients have had success.
- Wait until you get enough information from the client, so you can do your best to align their experience with the information you receive.
  - “Company X was having issues with A and B. They had looked at C, but were really hoping to find something that hit on A and B, but also was [benefit] and [specific feature]. They had been looking for a long time until they came across STARTUP. After using STARTUP, they were able to go from current state to future state (before and after example)
- Incorporate expertise into your questions.
  - Specifically around pains that your product solves for, to showcase your expertise.
- Stay quiet and let them speak.
  - The goal is for you to be in the 40-50% talking range and them in the 50-60% talking range.
- Don’t make assumptions about things.
  - Ask for clarification!
  - Often, prospects will tell you whatever you need to know, but only if you ask.

After the call is over and the invite has been sent out, you’ll need to send a brief recap email. You can thank them for their time, and write a sentence about your company and how you can help with their specific problems. If you said you would send over a case study, write a sentence on that as well. Last, then mention what you’ll be doing for next steps.

*Exercise: write down your lists of discovery questions,*

## Demo Call Best Practices

After a successful first intro/discovery call, you'll demo your product.

These are my basic rules for running a successful product demo:


When the call starts, and after you've expressed pleasantries, you want to recap the last call you had. You should also ask, "Has anything changed since we last spoke?" Most of the time the prospect will say that nothing has changed, but you'd be surprised to find out that some prospects will give you significant updates. It could be related to internal priorities, it could be related to budget, it could be extremely positive news, or they may have discussed your product in detail within the team and have some questions to ask. Asking this question at the start is important, because the more information you have, the better you'll be able to sell.

Often decision makers or new people are brought into the demo call. You'll want to ask them how they're affected by the problem, and understand their place in the decision making process. Unfortunately, you're not going to have a ton of time to dig, because the customer expectation for this call is to see your product. Try to get as much information as you can in a few minutes.

Based on your discovery call, you only want to show the parts of your product that are relevant to your prospect's pain points. If you have a really cool feature that does not help them solve their problem, there is no need to show it. The more tailored your product feels to solving their problem specifically, the better chance you have of moving forward in the sales process.

Do not feature dump! Do not walk the audience through every feature of your product. Nobody needs to see everything, and keeping interest and engagement levels up is important to keeping the call on topic. Feature dumping often leads to a loss of interest.

Do not go on long monologues. You need to keep the prospects engaged on the call. If you find yourself talking for more than a minute, stop and ask a question.



Do not ask, “Does this make sense?” during a product demo. People naturally do not like to admit they don’t know something, especially with colleagues present. Instead, ask them how they see X solving for [problem you discussed on the intro call]. Your goal is to get the prospects to envision a future where your product has solved their problem.

Another thing you can do is discuss their future state and get them to confirm what they’re currently doing. Once you have done this, then ask them how they see things changing with your product. You want them to state how they believe your product will change things compared to how they’re doing it today.

It’s important to take good notes on all your calls. That’s why you can - and should - reference your discovery call notes. When you want to show them a feature that solves a problem, reference specifically that they mentioned it, and the impact they said it had on their business.

As the demo call progresses you’ll get a bunch of questions. You should always answer succinctly. If you’re not sure what someone is asking, do not be afraid to ask for clarification. If they ask you a question and you don’t have a good answer, you can do one of two things: 1) Ask for clarification or 2) Try to understand why they’re asking that question. Often prospects will have seen other products with irrelevant features, or they want to play product manager and see if you can add new features to your product. It’s important to understand why they’re asking that to better understand the motives behind their inquiry.

Towards the end of the demo, after you’ve fielded all their questions, you want to suggest a next step. It’s very startup specific, but to keep this simple you could ask, “Based on what you saw today and how we can help solve X, is there any reason you wouldn’t move forward with a license?” This *can be* a bit aggressive. It may not fit every sales process, but it’s a good question to ask. They might provide feedback, they might say they need to discuss internally, they might ask for more information. Or, they might say, “Let’s get a contract written up.” Whatever the next step is, you need to schedule time again on the calendar to discuss with the prospect.

*Exercise: Record your next demo call and see if you’re following the advice in this chapter*



## Pilots

If you need to run a pilot with a company before they move forward with a long term agreement, you need to set success criteria for the pilot. When that success criteria is met, they move forward with a long term agreement. You should also do paid pilots because they'll be taken more seriously.

*Exercise: Write down what success criteria could look like for prospects so you're prepared to discuss it with them.*



## Proposal Best Practices


Your demo call went well and they asked for a proposal! Try to keep your proposal or contract as **simple as possible**. The shorter the better. Obviously, you need to include whatever your legal terms mandate, but for the rest of the proposal, try to keep it to one or two pages.

You should always review a proposal on a call with your prospect. You do not want to send it via email for them to review. When you have a call, you'll receive more feedback. If you do it over Zoom, you'll be able to judge their reaction and jump on any potential objections. You'll also be able to answer questions more efficiently. Tone doesn't translate well over email. Make sure any negotiations occur over Zoom or via the phone. You can't properly negotiate via email. If you're not a good negotiator, you should read *Never Split The Difference*. Most people are not good negotiators because negotiating is a learned skill, and they need to practice and refine it.

Pay attention to payment terms. I've seen payment terms as bad as Net 120. That means the client can take 120 days before they pay you. Do not be afraid to push back on their terms. Ideally *you* set the terms and *they* push back. If you do give any type of concession, make sure to ask for something in return. You could ask for testimonials or a case study.

Some clients always try to get discounts. Small discounts are okay, if necessary to close a deal. I'm not a huge fan of discounting because if we're at the contract stage and pricing has been discussed, it's clear that I have built a valuable product that solves an important problem for them. A discount or no discount shouldn't impact whether or not they move forward. However, some people need to get a discount to win. Keep the discount small to 5%, 10% max. Hold your ground.

If a client is asking for a massive discount, do not give in. A few times in my career we've done large discounts for clients who promised us introductions, and they were always the worst clients. One memorable example was the time I closed a deal with the CEO of a company that did \$100M in revenue. I was new in my role



and wanted to get my first win under my belt, so I did everything I could to convince the Founder to discount it. I told him all the promises he made and how this could be a huge opportunity for us. Unfortunately, he was a pain in the ass client and never fulfilled his promises. He also fought us on the discounted bill, despite us delivering on exactly what was promised.

When it's time to get a signature, use something like DocuSign. It will help to eliminate any signing friction. Make sure you're sending the contract to the person signing so you may need to ask or confirm the contact information.

## Pricing

Pricing is tricky. There are better sources of pricing information than what I can provide in this book. It's important to remember that in B2B sales, companies have plenty of money. The money is the company's money, not the person you're speaking with, and they're probably paying a ton of money for all sorts of useless software. There's plenty of money to be had. I often work with Founders who are surprised to hear how much companies spend on certain items and that a \$900 annual license is nothing.

I'm not a fan of giving products away for prospects to pilot or have for free without a formal pilot. Of course, if you're focusing on product led growth or have a freemium/free trial strategy, this does not apply.

You can probably raise your prices. As I said, companies have plenty of money. You may get anchored by the pricing of similar products in your category.

## The Sales Funnel

A basic sales funnel has three parts. The top, middle, and bottom. Prospects move through the funnel, some fall out after an intro call, after a demo, and not everyone will close who receives a contract. You'll be able to determine the conversion rate at each step through the funnel.

Tracking the steps in your sales process and mapping that to your funnel is important because sales then becomes a math equation. You can eventually figure out how many emails you need to send to book a meeting, how many meetings you need to book to schedule a demo, how many demos turn to contracts, and then how many contracts become new clients. With this info. on hand, you'll be able to forecast revenue and what you need to do to grow it. With time, you'll optimize for each stage of the funnel. If people are dropping off after the demo call, you know you need to work on your discovery call and demo skills. If you can't get people to a demo, then you might not be targeting the right prospects or more likely, you need to work on discovery. If you're closing clients at a high percentage, but you don't have a lot in your pipe, you need to put more resources into the top of your funnel.

## Sales Tips

These are sales tips based on working with non-sales Founders over the years.

- **Benefits not features**

Technical founders like to explain how the sausage is made and describe all the bells and whistles. Nobody wants to hear about how the product works. Show them what it can do for them.

- **Ask for business**

At some point, you're going to have to ask for them to sign a contract. *"Based on what we've discussed today, is there any reason you wouldn't move forward with x?"*

- **You need to take good notes**

You'll have a lot of calls. They'll all blend together, and you won't remember everything. Take good notes during the call, and then immediately enter them into your CRM. If you don't have a CRM, use a spreadsheet. Notes are important to staying organized.

- **90 days job change**


A person who has changed jobs within the last 90 days is a hot prospect. LinkedIn Sales Navigator has a feature which you can use to build your Tier 1 prospect list. It shows you who has changed jobs in the past 90 days. This means they're like 2-10X more likely to buy something.

- **Calendar calls for proposals.**

Calendar all calls. Do not get off calls without calendaring next steps.

- **Pilots**

Pilots need to have defined success criteria. You don't give a product to a



customer to try out for a pilot. You need to define what a successful pilot looks like in advance, so you can be in a strong position to move forward.

- **Timing**

Schedule calls in the afternoon and for as soon as possible. You'll increase your show rate.

- **Sales Decks**

Don't use a deck in your sales calls - it's a crutch, and prospects will tune it out. It's not engaging enough. *You need to be asking questions.*

## Top Sales Tips

- **Sales activity is really really important**

The more prospecting you do, the more first meetings you will book. The more first meetings you book, the more demos you'll have. The more demos you have, the more contracts will get sent. The more contracts you send, the more clients you will sign. It all starts at the top with grinding out prospecting. If you don't dedicate enough time to selling, you will not have enough in your pipe. If you don't have enough in your pipe, you'll miss your sales goals. Dedicate time every week to sales prospecting.





- **Calendar next steps at the end of each call**

One of the more common mistakes I see new salespeople and Founders make is that they don't schedule the next call and agree to next steps while they're on the phone. This leads to not having next calls calendared with your prospect. If you do not do this, you will get ghosted, you will have longer sales cycles, and you will have to hunt your prospects down. It's one of the easiest ways to keep your sales cycles moving along with some predictability. It also allows you to more accurately forecast your revenue. Most importantly, it will make your life easier.

- **Provide a great customer experience**

You may not have the best product in your category, but you can provide the best customer experience. Be responsive. If a prospect emails you on the weekend, get back to them. If a question comes in after hours, do not wait to answer it! Think about the best customer experiences you've had, and make that happen for your prospects. If you say you're going to send a contract tonight, make sure you send it *that night*. If a prospect isn't a fit, you should still help them. Be honest, and don't waste their time.

- **Selling is a series of small closes**



In B2B sales that are not one-call closes, you're going to move prospects through multiple steps in your sales process. *Each step is a small close.* Booking a meeting, the intro call, the demo call, the call to discuss the contract - these are all necessary in the sequence of events leading up to meeting your sales goals. These are also all steps that should be thought of as small closes. Moving the prospect forward to each new step is a new "close" that will get you one step closer to closing the deal.

- **Be persistent and don't give up**

You are about to take so many L's and get rejected a ton. Some people can't handle sales because performance is objective. You either win business or you don't. Revenue either comes in or it doesn't. *There are no moral victories in sales.* Unfortunately for a lot of startup Founders, they're not ready to take on what can be L after L after L - it's unlike anything they've experienced. People will reject you, they may even insult your product or you personally, but none of that matters; you have to take a long term perspective. Realize that if you are persistent and you don't give up, you *will* close business. If you dedicate time to selling and improving your sales skills and your product, you *will* close business. Be persistent and don't give up.



## Sales Tools I Recommend

Here are tools I use that you can use.

- Contact Database and email platform

Apollo is great because it has a full database of contacts that makes building prospect lists a breeze and allows you to send cold emails. Great for solo founders and small sales teams.

- Email Warm Up

Before you send emails with a tool like Apollo, you need to warm up your email account.

- LinkedIn Automation

If you want to automate viewing profiles, collecting profile information, and building your network, Dux-Soup is an affordable and highly effective tool.

- Technographic Information

Builtwith.com is a useful site for top quality technographic information when building prospect lists.

- LinkedIn Sales Navigator

This is useful for researching prospects, 90 day job changes, and building lists.

- DocuSign

There are a bunch of tools that do eSignatures but I'm a user of DocuSign and like it the most out of all the tools I've tried.

## Get In Touch!

If you ever need sales help, feel free to reach out directly to me at:

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I hope you found this book helpful.

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