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Buyer Personas and Modern Outbound

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SECTION 01

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Buyer Personas

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"Buyer personas are fictional, generalized representations of your ideal customers. They help you understand your customers (and prospective customers) better, and make it easier for you to tailor content to the specific needs, behaviors, and concerns of different groups."

– Hubspot

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Ideal client persona

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Adam S.

Chief Medical Officer (CMO)

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Background

Chief medical officer of XYZ company.

Married with 2 children.

Medical practitioner for 10-15 years.

Age

45-55 years old

Salary

$350k - $450k

Education

Degree type goes here

Job Characteristics

- Urban/suburban
- Probably has an assistant screening calls.

Identifiers

- Skews male.
- 3 main types of leadership styles: autocratic, participative and delegative

Persona: Adam S.

Goals

What are their primary goals in this position? What would they be measured on for success?

Engaged in defining the overall business strategy and direction of the organization.

Challenges

What are their common challenges?

Reducing expenses. Monitoring and holding hospitals accountable to the quality of provided services.

What can we do

How can we help this persona achieve his/her goals?

Support their mission to reduce costs and provide higher quality care in providing a solution for patients to manage their diabetes better.

Common objections

What are the common objections this persona would have about your product/services?

I'm not sure if our patients will adopt this tool. Also don't want to put more work on my doctors outside of patient visits. How do I know this will work?

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Persona: Adam S.

What I say

Real quotes from persona about goals, challenges, etc.

"The overriding primary concern or challenge for all CMOs is all hospitals are dealing with unprecedented cost pressures, and we will see more pressure on cost reduction than we have ever seen in our careers. Given that pressure, how do we continue to improve our clinical outcomes and patient safety? That is the single biggest challenge of the medical officer today." (Source)

Market Messaging

What are their primary goals in this position? What would they be measured on for success?

$140 billion was spent on preventable costs in 2015 and these complications could have been avoided if patients could manage their diabetes better.

Elevator Pitch

What are their primary goals in this position? What would they be measured on for success?

DoseDr works with insurers to offer patients a mobile app to control and manage their diabetes. Empowered patients mean healthier patients, saving your bottom line costs.

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Example 1:
Director of Customer Success

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Develop Assumptions Around Target Companies

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Stages

Step One

Step Two

Step Three

Step Four

Step Five

- Industry
- Company Size
- X-Factor

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Example 1: Director of Customer Success

Develop Assumptions Around Target Companies

John - the Director of Customer Success

Company size: Above $100MM

Industry: Growing B2B technology company

X-Factor: Business relies on corporate customers, relationships, lots of competition, long sales cycles with their customers

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Develop Assumptions About the Person

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Stages

Step One

Step Two

Step Three

Step Four

Step Five

- Responsibilities in relation to your product
- Title
- Demographics – M/F, Married? Kids?
- Tone

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Develop Assumptions Around Target Companies

John - the Director of Customer Success

Responsibilities: The person is responsible for all customer retention; he or she leads that team that needs to ensure customers sign on year over year and that their accounts GROW with the company

Demographics: Age 30-40, probably started off in Sales or as an Account Manager, gets in the weeds with clients on a daily basis

Tone: He needs customers to stay happy so is constantly nervous with so much out of his control; he needs to make sure customers are satisfied with his company's services/product and wouldn't consider switching to a competitor, he constantly seeks client feedback

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Determine the Goals of the End User AND the Buyer

Stages

Step One

Step Two

Step Three

Step Four

Step Five

- What does success look like?
- How is this person bonused?

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Develop Assumptions Around Target Companies

John - the Director of Customer Success

Success for this person is a high retention rate that grows YoY and a clear dollar amount contributed to the business through Account Growth of Current Customers.

John is bonused if the current is able to grow the current book of business by a certain percentage, so he is constantly looking for upsell opportunities and driving his team to built relationships that allow for these to naturally come up in conversation.

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Determine the Pain Points of the End User AND the Buyer

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Stages

Step One

Step Two

Step Three

Step Four

Step Five

- What keeps them up at night?
- What is their number 1 challenge?
- What is their number 2 challenge?

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Develop Assumptions
Around Target Companies

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**John - the Director of
Customer Success**

CHURN.

John is kept up at night by unhappy clients who call his team to complain about the product/service his company offers.

John's biggest challenges are finding ways to stand apart from the his competition, ensure his team is meeting the growing demands from current customers and help his team to build relationships that would prevent an individual from moving to the competition.

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Determine the Pain Points of the End User AND the Buyer

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Stages

Step One

Step Two

Step Three

Step Four

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- What keeps them up at night?
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Develop Assumptions Around Target Companies

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How do we help?

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Stages

Step One

Step Two

Step Three

Step Four

Step Five

- How do we help them reach their goals?
- How do we help alleviate their pain?

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Develop Assumptions Around Target Companies

John - the Director of Customer Success

By having an opportunity like season tickets or group tickets available for an upcoming game, John can invite his top Accounts as well as his At Risk Accounts for a fun, laid-back way to learn how BSE can be a better partner or salvage the relationship.

By taking the conversation out of the office (especially knowing that many of his customers love going to games), John and his team can build long-term relationships that prompt ongoing commitments and upsell opportunities from their current book of business.

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Group Workshop

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Buyer persona #1

Background
Short details about the persona that provide a general background on them.

Age
XX years old

Salary
$XXk - $XXk

Education
Degree type goes here

Job Characteristics
- Job activities
- Is it stressful?

Identifiers
- Personal trait
- Personal trait
- Personal trait

First Name Last Name

Job title/role

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Persona: [Name here]

Goals

What are their primary goals in this position? What would they be measured on for success?

Engaged in defining the overall business strategy and direction of the organization.

Challenges

What are their common challenges?

Reducing expenses. Monitoring and holding hospitals accountable to the quality of provided services.

What can we do

How can we help this persona achieve his/her goals?

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Common objections

What are the common objections this persona would have about your product/services?

I'm not sure if our patients will adopt this tool. Also don't want to put more work on my doctors outside of patient visits. How do I know this will work?

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Persona: [Name here]

What I say

Real quotes from persona about goals, challenges, etc.

"quotation of what the person might have said" or a quotation from a source who fits the buyer persona listed here.

Market Messaging

What are their primary goals in this position? What would they be measured on for success?

Goal A
Goal B

Elevator Pitch

What are their primary goals in this position? What would they be measured on for success?

Your elevator pitch goes here

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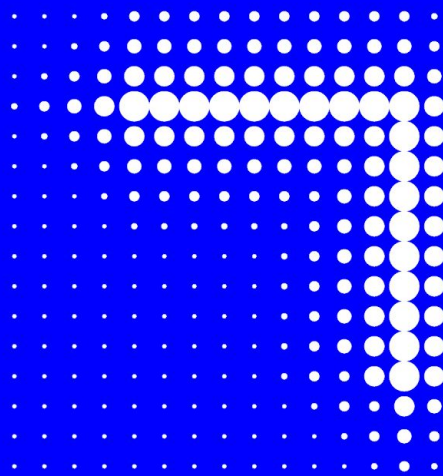
Calls, Emails and Social Best
Practices

Table of Contents

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SECTION *01*

Messaging & Finding your Angles

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Unlocking a new perspective is the best tactic

8 In your most recent transaction with a vendor: Which of the following factors influenced you to take the meeting? Select all that apply.

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Messaging & Finding Your Angles

Be informed!

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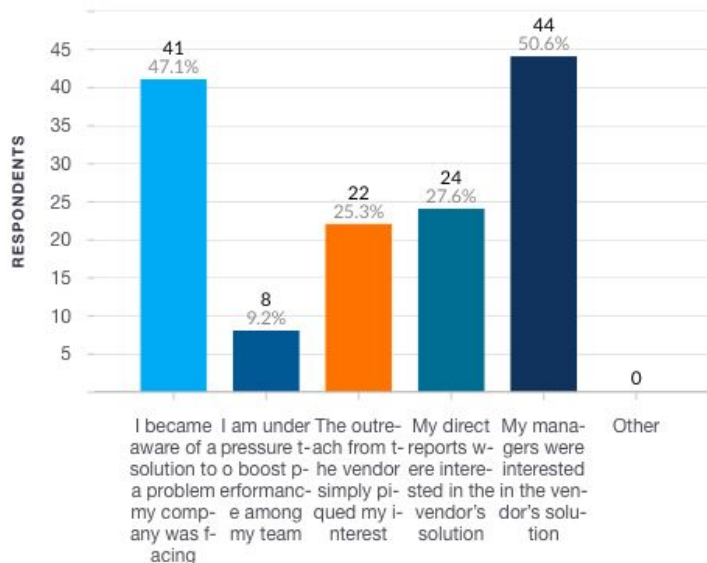
9 In your most recent transaction with a vendor:
Did the vendor offer personalized content regarding
your company when they initially reached out?

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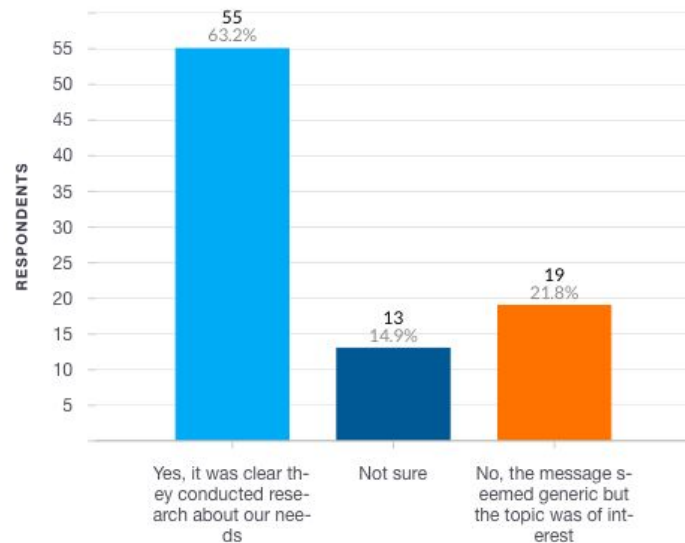
86%

of the value propositions salespeople present aren't relevant enough to get the customer to take action."
CSO Insights

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Best Practices

Messaging

Frame your messaging thoughtfully.

Keep it simple, limit the choices and the call to action (CTA).

Sell to the individual → then the employee → then the company.

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Bulk Example
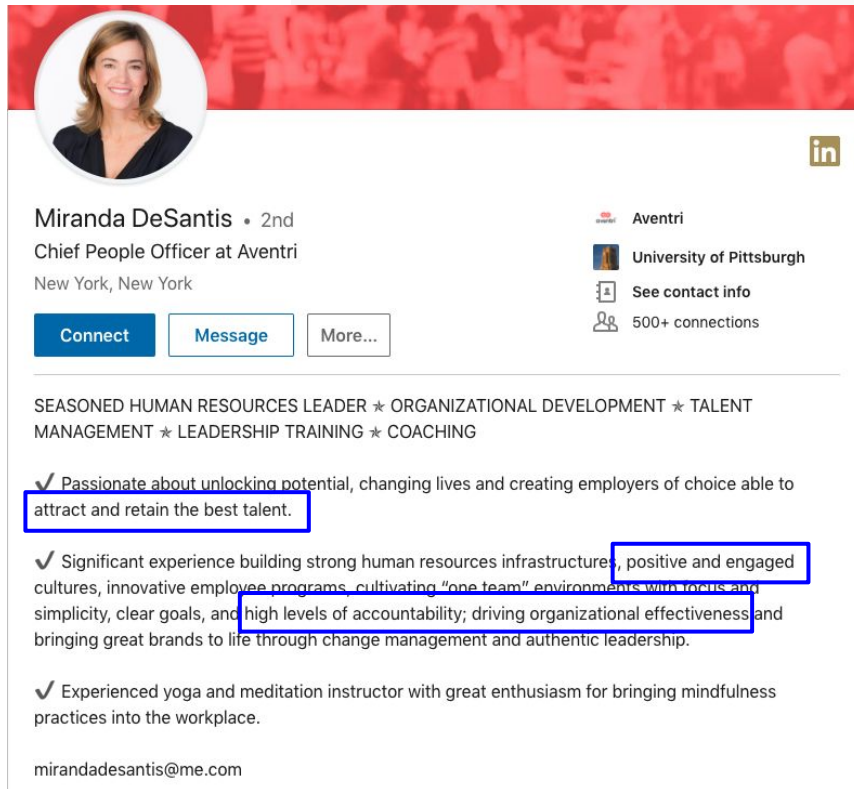
Poor subject, poor message

New Message

To:

Cc:

Bcc:

Subject: Re: Checking In

From:

Hi {first name},

I wanted to circle back from my previous e-mail and explore whether or not DoseDr is a good fit for {Company}.

At DoseDr, we're a telemedicine company that helps reduce hospital readmissions by offering patients remote diabetes care. We are partnering with some of the nation's largest insurance companies and thought it would be great to reach out to you.

Please let me know if this coming Thursday afternoon works for a quick phone call and I'll coordinate a calendar invite.

Best,

Open : 9.84%

Reply: 5.42%

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Functional

Functional

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Functional

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SECTION *02*

Cold Calls

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Personal

Miranda DeSantis • 2nd
Chief People Officer at Aventri
New York, New York

Connect **Message** More...

Aventri
University of Pittsburgh
See contact info
500+ connections

SEASONED HUMAN RESOURCES LEADER ✶ ORGANIZATIONAL DEVELOPMENT ✶ TALENT MANAGEMENT ✶ LEADERSHIP TRAINING ✶ COACHING

✔️ Passionate about unlocking potential, changing lives and creating employers of choice able to attract and retain the best talent.

✔️ Significant experience building strong human resources infrastructures, positive and engaged cultures, innovative employee programs, cultivating "one team" environments with focus and simplicity, clear goals, and high levels of accountability; driving organizational effectiveness and bringing great brands to life through change management and authentic leadership.

✔️ Experienced yoga and meditation instructor with great enthusiasm for bringing mindfulness practices into the workplace.

mirandadesantis@me.com

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Personal

skaled.com

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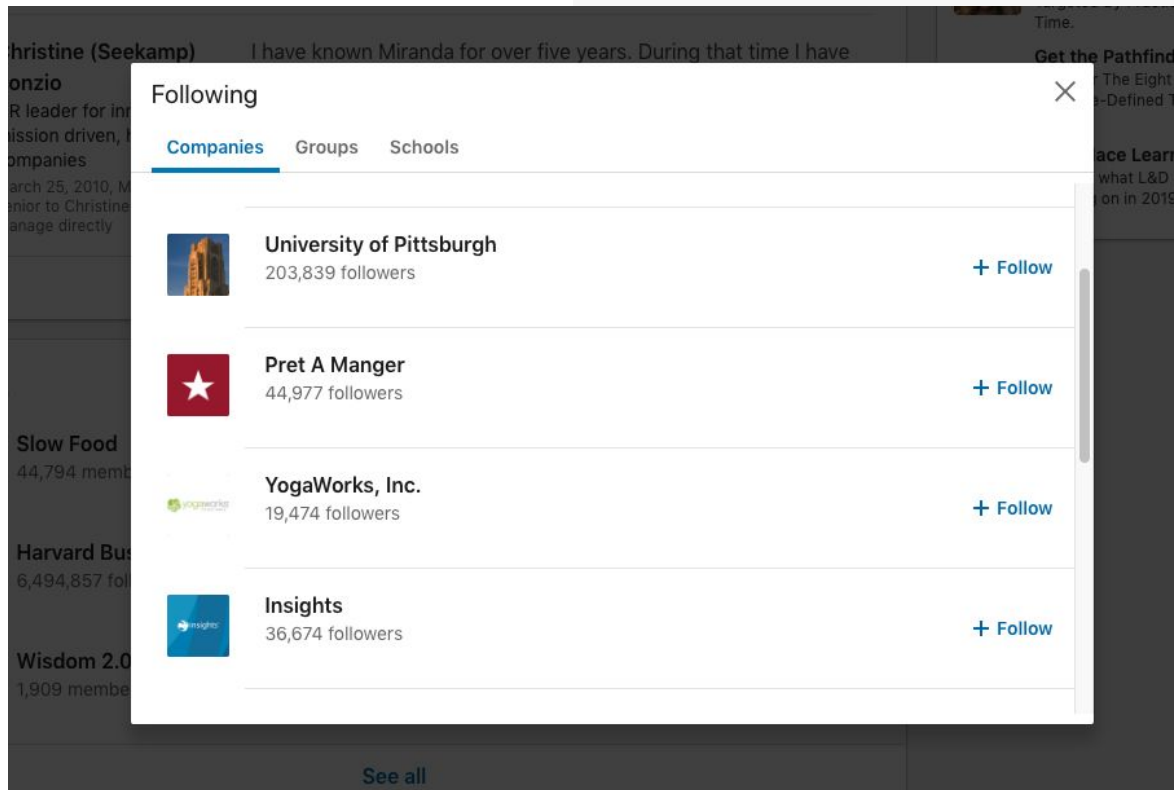
Example

Personalizing emails

Subject: Building a culture of engagement and accountability

Hi Miranda,

It seems like creating a culture of positive engagement and accountability is important to you.

At Ultimate, it's important to us too - and we find that leading companies are using internal and external benchmarking to reinforce performance.

Would you be open to discussing how you're approaching this, and what we've seen as best practices among our clients?

Best,

[Your name]

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What Makes an Effective Cold Call?

Research

Before picking up the phone, do research (internal database and external sources) to make sure you understand who you will be speaking with.

Goal Identification

Understand the goal of the cold call -- to engage, generate interest and qualify the person/organization.

Be Prepared

Be prepared to concisely explain why you are calling. Preempt FAQs and common objections.

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Best Practices

Cold Calling

Be persistent - cold call effectiveness doesn't start until the 4th to 5th touchpoint and it peaks at the 9th touchpoint.

Gatekeepers are valuable sources of information.

- You can find out about the contact's schedule and organizational structure.
- They can point you to more relevant contact.
- Make them feel valued!

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What is the Impact?

Tone & pitch

What does the tone of your voice convey? Does it reflect confidence? Friendliness? Boredom? Immaturity?

Are you speaking too fast? Too slow?

Vary your pitch and inflection to create more energy

Many studies have shown that we perceive people with lower-pitched voices to be more competent and trustworthy

Best practice
Listen to you own calls so you can adjust on all factors listed here.

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Core Components

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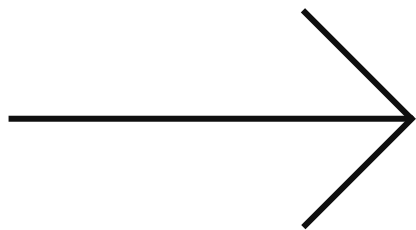
01

Introduction

02

Confirm Role

03

Confirm Need

04

Giving Value or Potential Fit

05

Ask - Referral or Meeting

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Sample Call

Introduction + confirm role

"Hi Rob, this is Katie with New York Jets I saw after talking to a few people they suggested that we should set up a quick conversation

No pause - I was forwarded to you by way of <Referral if you have> - they said that anything business growth or for your revenue targets this year that you were the right connection?

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Sample Call

Confirm need

"Ok great - we work with many Sales and Success Leaders who face challenges around retaining clients and more importantly, helping the client accounts grow year over year.

Is new client retention and growth a key focus this year?

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Sample Call

Giving value + asking for the meeting

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"Yes, we know this is an issue for many leaders in Customer Success and it sounds like you might be seeing this at [Company name] as well.

Why don't we set up a 10 minute call to chat in more detail? That way, I can share how other [job titles] are partnering with [Company] to build their [potential you bring]. Hold on one second...let me pull up my calendar...How does DATE and TIME look on your end?

Sounds good, looking forward to our call."

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Cold Calling

Persona, persona, persona.

Treat the call as an opportunity for education.

Use location, industry, and competitors.

Be brief and don't oversell.

Confirm there is a need and secure the meeting or ask for a referral.

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SECTION 03

Emails

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Strong Outbound Messaging

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The essential part of a successful outbound sales effort.

Messaging should be personalized when time permits, consistently relevant, and have a call to action in each note.

Messaging cadences (rate and form of outreach) should be tailored to the industry and buyer persona.

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Email Structure

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Subject line

On average, email open rates are between 20% and 30%

Having a subject line means relaying your key message even if the reader doesn't open the email

Use descriptive subject lines or clear call to action

Opening

The preheader appears next to the subject line in most email clients, generated from the first line of text in your email

Frame the messaging around the prospect's position

Include messaging that is relevant to the prospect

Add personalization where possible

Body

Keep this short and simple

What is the value proposition for the prospect?

What is a quick value add piece of information you can share?

Call to action

End the email with a call to action

Ask to schedule a quick 8 minute conversation on a specific date and time

Bulk Example

Great subject, great message

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New Message

To:

Cc:

Bcc:

Subject: Referred to you via {COO's First Name}'s Office

From:

Hi {first name},

Hope all is well! I just looked on your LinkedIn and [[custom messaging based on research]]

[[well-crafted message that lets this know how your product relates to their pains and gives them a reason to respond]]

It would be great if we could schedule 15 minutes next week to get your thoughts about how you're thinking about [[common pains or initiatives for this persona]]. What works best for you on {{3_days_from_now}}?

Thanks in advance,

Open : 61%

Reply: 26%

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Opening: establish credibility

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Option A

Discuss why you are reaching out to them in particular because....

- They are a specific title in a type of company that should care because (Industry/functional trend).
- They showed some interest.
- You were referred by one of their peers.

Option B

Demonstrate industry expertise, or the results of your work with their competitors.
In working with [insert industry], they mentioned [relevant point]:

- When researching (industry/topic), we found (relevant statistic) and thought it would be interesting to share.
- Relevant articles.

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2nd paragraph: outline the pain

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Option A

Discuss their pain points and challenges. Ex: As the *(title),* I'm sure you are well aware of *(relevant pain points).*

Option B

Discuss threatening industry trends. Ex: We've seen a lot of *(relevant titles)* struggle to *(achieve / overcome XYZ)* given *(industry trend),* so there is a growing need for *(challenges Ultimate solves for).*

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Email

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- Understand who you are reaching out to
- Target more than one person in the company
- Create credibility – reference relevant industry clients
- Add value - highlight their specific pain and give a solution
- Only share relevant content to who you're emailing
- Show proof that you've done research and understand their role and organization

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It really matters

Personalization

Increase response rate 2-3x in 5min

Personalizing the first 20% of your email results in 2x response rates, but ROI decreases if you spend more than 5 minutes personalizing

Always include personalization early on and leave the remaining 80% templated

Probability of Replies by Proportion of Personalization (Overall)
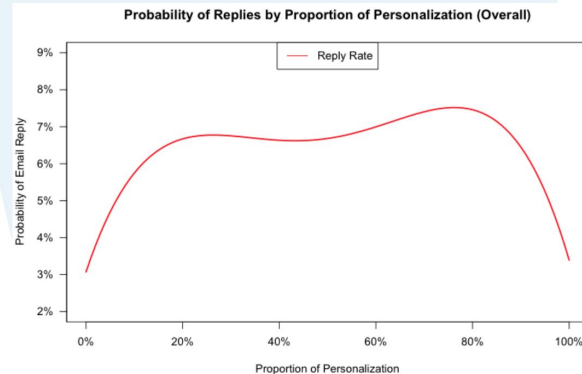
Sales email probability of replies proportion of personalization

Reply Probability

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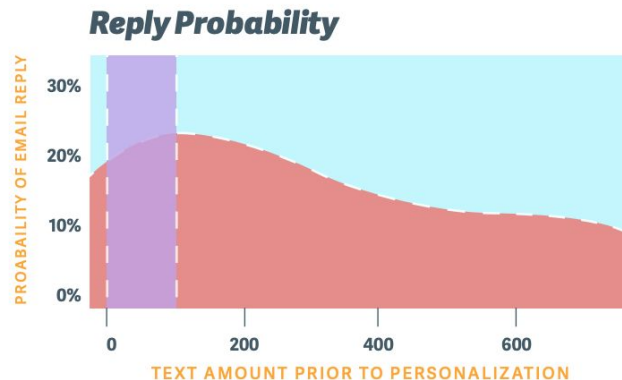
Personalization and Customization Tips

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X factors they care about that are relevant to your product

Example:
I noticed that your company had a few reviews on Glassdoor mentioning a desire for more social outings for the team.

Use statistics that are relevant to them

Example:
Inc.com recently published a study around the importance of getting teams out of the office together...

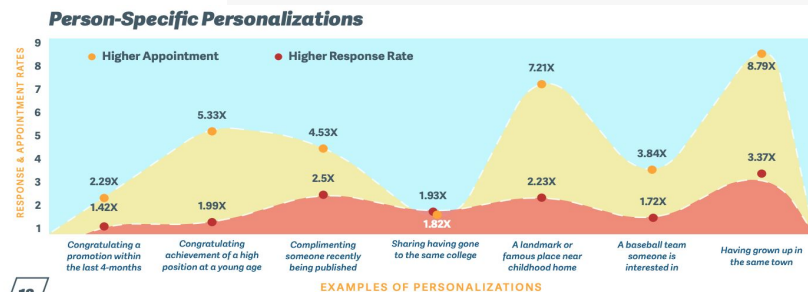### Relevant information on their LinkedIn or company news

Example:
I saw on LinkedIn that we're from the same 5,000-person hometown - love it. Did you go to the Diner on Rt. 9 as much I did in High School?

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Sentiments

Using the word "congrats" in-reference to a personal achievement increases reply rates 2x and appointments by an avg. of 4x

Use LinkedIn steps to expedite this research step

Person-Specific Personalizations

RESPONSE & APPOINTMENT RATES

● Higher Appointment   ● Higher Response Rate

2.29X
1.42X

5.33X

4.53X

1.99X

2.5X

1.93X
1.82X

7.21X

2.23X

3.84X

1.72X

8.79X

3.37X

9 8 7 6 5 4 3 2 1

Congratulating a promotion within the last 4-months

Congratulating achievement of a high position at a young age

Complimenting someone recently being published

Sharing having gone to the same college

A landmark or famous place near childhood home

A baseball team someone is interested in

Having grown up in the same town

EXAMPLES OF PERSONALIZATIONS

12

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Bias towards informal
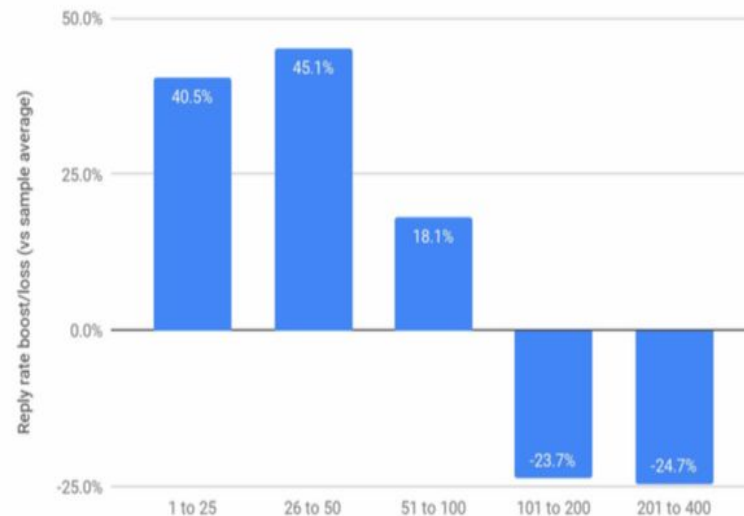
Use 1 to 4 word subject lines

Do:
- Keep it mobile-friendly
- Emails with under 100 words are more effective Writing with an elementary vernacular is 95% more effective
- Be clear + direct

Don't:
- Use bullets
- Include multiple links
- Use more than 2 images
- Include a p.s.

Sign-Offs:
- "Best" is the most effective
- While "thank you" is least effective

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Source: SalesLoft

Email

Let's recap

Frame your messaging thoughtfully - start by empathizing with the persona.

Keep it simple, limit the choices and call to action (CTA).

Sell to the individual, then the employee, then the company.

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Draft an email & group discussion

- Break into groups of 3.
- Empathize with that persona and consider their 'language'.
- Draft the subject and body of the first two email touches in the sequence.
- Discuss among your group.

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Thank you!

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