TACTIC TOOLKIT

1 Sequence to Create and 5 Templates to Close

Outreach x 30 Minutes to President's Club

What's going on folks! It's **Armand** crashing the Outreach Party.

The days of the inbound-only rep are coming to an end. The markets are becoming tighter and more saturated with messaging than ever before. So if you want to be a top 1% rep or make it to President's Club, you have to be able to **create and close pipeline**.

That means tag-teaming accounts with your SDR, not just throwing them over the fence. That means efficiently creating more of your own pipeline so you can predictably close more deals.

It's a new era of sales, the era of the Create and Close rep. The entrants into next year's Club won't be one-event-wonders. They'll be the winners of the decathlon who can do it all.

So on that basis, we plan to practice what we're preaching here with **a two-for-one, create and close 30MPC x Outreach special treat:**

1. **One Outbound Sequence to Create Pipeline:** We've got an outbound sequence that you can customize to carve through your territory and find your next big opportunity.

2. **5 Templates to Close Pipeline:** Once you've got that opportunity, we've got 5 emails that you can use to start your sales cycle on the right foot and drive that deal all the way to close.

About Outreach

Outreach is the only complete Sales Execution Platform that unlocks seller productivity to create more pipeline and close more deals.

If you liked what you saw here and you don't already use Outreach… what are you doing!? Check it out **here** and stamp your tickets to this year's President's club.

One Outbound Sequence to Create Pipeline

Use these emails to find your next opportunity today!

Sequence Overview

When you're breaking into an account - you've gotta hit 'em from multiple angles – leverage cold calls, cold email, and social touches in a mix across a month's time.

Section I: Lead with Tailoring/Biggest Problem

a. LinkedIn Invitation: Step 1, Day 1
b. Email: Step 2, Day 1

Section II: The Bubble Ups

a. Round 1:
   i. Call: Step 3, Day 3
   ii. Email: Step 4, Day 3
   iii. InMail: Step 5, Day 3
b. Round 2:
   i. Call: Step 6, Day 7
   ii. InMail: Step 7, Day 7
   iii. Email: Step 8, Day 7

Section III: Pivot to 2nd Biggest Problem

a. Call: Step 9, Day 11
b. Email: Step 10, Day 11
c. Call: Step 11, Day 15
d. Email: Step 12, Day 15

Section IV: Break-up

a. Email: Step 13, Day 19
b. Email: Step 14, Day 23
c. Email: Step 15, Day 27

The sequence above leads with a LinkedIn Invitation and Email, which will usually clear out the first batch of replies.

From there, you'll run the Call-Email-InMail trio twice, then start to phase the calls and InMails out as the likelihood of a reply goes down.

Lots of people stack their sequences with 6-8 calls, I prefer to spend that time finding creative ways to break into an account instead of hoping that they pick up on dial #8. Work smart and hard.

Section I: The Opening Touches

Leading with a LinkedIn invitation and email allows your prospects to familiarize themselves with your name and draws out the early replies and DQs.

LinkedIn Invitation: Step 1, Day 1
I prefer to keep the LinkedIn invitation blank. It's really easy for tailored invitations to come off as sales pitches – so the time you spend tailoring invitations is better served tailoring emails, InMails, or even finding other ways to break in.

Email: Step 2, Day 1

Great prospecting emails are short, punchy, and problem-centric. The 3x3 email is an email that should be 3 bodies of text, no longer than 3 lines each, when read on your phone!

Template Subject Line: Keep it 3-4 words max!	**Example** Subject Line: 102 Acme SDRs
Hey **[PROSPECT]**, Noticed that **[observation that leads to a problem you can solve]**. So **[your company]** helps by **[how you solve that problem in one sentence]**. Opposed to taking a look? - **[NAME]**	Hey Jane, Scrolling through your job postings and saw that you're hiring a ton of SDRs. Hiring's one way to build pipeline, but we know even a VP of Sales is being asked to do more with less right now. So Outreach can make your AEs generate as much pipeline as your top SDRs. Opposed to taking a look? - Armand

Section II: The Bubble Ups

Once that first tailored email is out in the wild, you want to give it at least two more chances for the thoughtful research to be seen. So this will be the most intense portion of the sequence, with two rounds of a Call-Email-Inmail duo.

Round 1

Call: Step 3, Day 3
While you're making that first cold call, pull up the first email you sent in Outreach and use that same research to tailor your messaging. I prefer to leave voicemails after the 1st and 2nd calls, then stop after that per the law of diminishing returns.

Email: Step 4, Day 3	
The goal with this first bubble-up is to keep it really, really short. This bubble-up often gets more replies than the original email.	
Template Reply to the previous email	**Example** Reply to the previous email
Any thoughts?	Any thoughts?

InMail: Step 5, Day 3	
Keep this first InMail super short and **don't sell**. Your goal is to drive a reply to the email. If they've accepted your invitation, send a DM, not an InMail. If not, you'll have to come up with an InMail subject line - just use the same one as your email to get the touches working together.	
Template InMail Subject Line: Same as the 1st Email	**Example** InMail Subject Line: 102 Acme SDRs
[NAME] - noticed **[thoughtful observation]** and *sometimes* that means we can help. I know everyone hates the connect and pitch thing, so I'll send you an email to expand. Let me know what you think when it hits the inbox!	Jane - noticed you've got 3 SDR job postings open and the team at Acme's growing fast – *sometimes* that means we can be helpful. But I know everyone hates the whole connect and pitch thing, so I'll send you an email to expand. Let me know what you think when it hits the inbox!

Round 2

Call: Step 6, Day 7
Same deal with this call. Use that first email for tailoring inspiration and leave a voicemail. This will be your last voicemail.

Email: Step 7, Day 7	
The goal with this one is still to keep it short, but point to the fact that we're not just sending automated messages, we've been reaching out to them directly. We'll also throw in a light give to create some goodwill instead of hitting them with the same follow-up over and over.	
Template Reply to the previous email	**Example** Reply to the previous email
Just tried you over the phone. Sometimes it's easier to see than read - so here's **a 60 second demo video** I made in case you're curious to what **[your company]** is like. Open to taking a peek?	Just tried you over the phone. Sometimes it's easier to see than read - so here's **a 60 second demo video** I made in case you're curious to what Outreach is like. Open to taking a peek?

InMail: Step 8, Day 7	
Same principle behind InMail follow-ups. Keep them super short and always direct back to one place: the first email you sent them.	
Template Reply to the previous InMail or DM	**Example** Reply to the previous InMail or DM
And off it went – even moderately interesting? (PS: Totally fine if I'm in the wrong place, just let me know!)	And off it went – even moderately interesting? (PS: Totally fine if I'm in the wrong place, just let me know!)

Section III: Pivot to 2nd Biggest Problem

The first tailored email has been bubbled twice up to this point and we still don't have a bite. We're going to pivot to the next best problem you solve and see if that resonates.

Call: Step 9, Day 11
Hit the phones again, but this time, no voicemail.

Email: Step 10, Day 11	
This is another classic 3x3 email, but it won't be tailored beyond the persona level. Pick the biggest problem this persona feels and lead with that.	
Template Subject Line: Keep it 3-4 words max!	**Example** Subject Line: competitive intel
Hey **[PROSPECT]**, Typically **[common problem that this persona faces]**. So beyond **[1st problem you solved]**, we can help **[how you solve the 2nd problem in one sentence]**. Care to see it live? - **[NAME]**	Hey Jane, Once you've got that pipeline in your reps' hands, the worst thing in the world is losing it to a competitor! A lot of people know us for prospecting, but Outreach Kaia can surface live coaching insights (e.g. competitor talk tracks) to make sure that your reps create *and* close deals. Care to see it live? - Armand

Call: Step 11, Day 15
This'll be our last cold call. If they haven't picked up at this point, it's usually best to try other avenues.

Email: Step 12, Day 15	
The goal with this first bubble-up is to keep it really, really short. This bubble-up often gets more replies than the original email.	
Template Reply to the previous email	**Example** Reply to the previous email
Any thoughts?	Any thoughts?

Section IV: Break-up

At this point, we haven't had any luck with problem <> value proposition based emails. So we're just seeking the truth or an answer - and we're going to do that by giving them common "outs" or reasons they might not be replying.

We'll stop making calls now because we've made four and haven't gotten a reply yet. And each mini-break-up will have a different purpose with the goal of being persistent, but having a different reason for reaching out each time instead of hitting them with annoying messaging until they unsubscribe.

Email: Step 13, Day 19	
The first common "out" is going to be the fact that they might not be the right person to make a call on your tool. They'll either reply that they're not the right person, or say they are so that you don't contact anyone else mistakenly.	
Template Subject Line: wrong place?	**Example** Subject Line: wrong place?
Hey **[PROSPECT]**, I reached out a few times and realized that this kind of thing might be handled by someone else on your team. Any way you could point me in the right direction? **- [NAME]**	Hey Jane, I reached out a few times and realized that this kind of thing might be handled by someone else on your team. Any way you could point me in the right direction? - Armand

Email: Step 14, Day 23	
Still nothing? We're going to allude to the break-up and give the second common "out" - you're not interested!	
Template Reply to previous	**Example** Reply to previous
Hey **[PROSPECT]**, I've reached out a few times and I'd hate to be a burden if I'm in the right place but this just isn't a priority. Mind giving me a thumbs-up or thumbs-down? **- [NAME]**	Hey Jane, I've reached out a few times and I'd hate to be a burden if I'm in the right place but this just isn't a priority. Mind giving me a thumbs-up or thumbs-down? - Armand

Email: Step 15, Day 27	
And at last, here's the final break-up. This tugs on the last common "out" which is - they've been getting your emails, but they knew you'd keep reaching out so they're not replying right now. So pulling the cord can create some loss aversion and trigger some final replies.	
Template Reply to previous	**Example** Reply to previous
Hey **[PROSPECT]**, Tough to say, but I haven't heard from you so I'm going to assume this is a no-go for now. Here's a **[link to something helpful]** in case something ever changes on your end and you want to learn more. Just so I know whether or not I should reach out in a few months, could I get a sense if this is something that's even moderately on the radar? - **[NAME]**	Hey Jane, Tough to say, but I haven't heard from you so I'm going to assume this is a no-go for now. Here's a link to that **demo video** that you can keep handy in case something ever changes on your end and you want to learn more. Just so I know whether or not I should reach out in a few months, could I get a sense if this is something that's even moderately on the radar? - Armand

And that's a wrap folks... or is it?

Nope, in fact the game has just begun.

If you've used that sequence a few times over, you've hopefully got a flush pipeline.

And now it's time to equip yourself with even more templates and snippets you can use to take those opportunities to the closed-won finish line.

Five Emails to Close Pipeline

Now that you've got the pipeline, use these emails to drive it home.

Everyone's always talking about prospecting emails, but the work doesn't stop there. AEs spend hours building close plans and sending recaps, executive summaries, and multithreading emails to ensure deals make it to the finish line.

So we drew inspiration from **Outreach's Deal Health Checkup** and took 5 areas where deals often slip from open to closed-lost.

For each scenario, we'll break down what good (🟢), okay (🟡), and bad (🛑) look like.

And for anything that's not 🟢: we've got an email you can use to get it there.

Overview: 30MPC Path to Closing the Deal

Deal Risk Area	An Email to Solve It
Have you established a mutual action plan with the buyer's champion?	**The Mini Mutual Action Plan (MAP)**
Are there any outstanding next steps or action items you, your team, or the buyer's team need to complete?	**The Recap Email**
Are we engaged with stakeholders above the decision-making power line?	**The Exec-to-Exec Multithreading Email**
Are multiple personas engaged?	**The Executive Recap**
How many people are involved in the deal?	**The Multithreading Email**

The Mini Mutual Action Plan (MAP)		
Risk: Have you established a mutual action plan with the buyer's champion?		
🟢 Yes	🟡 No	🛑 I don't know

If you're not in the green...	**Try: The Mini Mutual Action Plan (MAP)**
Sellers often forget that while your job is 100% selling, a prospect's job is <5% buying. So you should never expect that every element of a buying process will go perfectly on-time. And you should certainly **never assume that their timeline is the same as your timeline**. So spell it out in a Mutual Action Plan (MAP). The right is an abridged version, compact and digestible in email form. Make sure you explicitly call out the owners and dates, and leverage bold and colors for specific callouts and statuses. (Psst...did you know that companies that use Outreach Mutual Action Plans improve their win rates by 13%? **Check it out**.)	Jane, I've got a bet. When you're fully live on Outreach, your best AEs are going to source more pipeline than your best SDRs. Only one way to find out! Here's the plan we discussed to go-live by **MM/DD**. To do this, we'll need to get a signature by **MM/DD**. Here's what we discussed live, with explicit callouts for you in **blue**. Legal • 🟢 MM/DD (Armand): Provide Order Form, MSA, and DPA for legal review. • 🛑 MM/DD (Jane): Return first comments on the above. **How's this looking?** • 🛑 MM/DD (Armand): Return final comments on docs. • 🛑 MM/DD (Jane): If needed, pre-schedule call with legal to finalize redlines. Security • 🟢 MM/DD (Jane): Share security questionnaire with Outreach team. • 🟡 MM/DD (Armand): Complete security questionnaire, provide SOC II report. **I shared the SOC II, almost done with the questionnaire**. • 🛑 MM/DD (Jane): Review questionnaire answers with InfoSec team. • 🛑 MM/DD (Both): If needed, pre-schedule call with security and Acme CISO to conclude security review. Anything I miss? - Armand

The Emails

<table>
<tr><th colspan="3">The Recap Email</th></tr>
<tr><td colspan="3">Risk: Are there any outstanding next steps or action items you, your team, or the buyer’s team need to complete?</td></tr>
<tr><td>Yes</td><td>No</td><td>I don’t know</td></tr>
<tr><td>If you’re not in the green…</td><td colspan="2">Try: The Recap Email</td></tr>
<tr><td>It’s your job to explicitly spell out what a prospect needs to do, and the recap email is the perfect place to do that.

We’ll put the action items upfront so they don’t get lost amidst a long email.

Then we’ll recap the most compelling problems they were looking to solve. It should be about them, not you.</td><td colspan="2">Hey Jane,

Great chatting with you earlier, I’ve included a quick recap, but looking forward to our next call on MM/DD:

Next Steps:
• Jane: Add Jill to the deep-dive demo next week
• Armand: Prepare a tailored demo, proposal for our next call
• If this goes well: Build a go-live action plan with the goal of having you up and running before your Q3 board meeting.

Recap: What’s Important to Jane?
• Optimize the SDR Machine: A few stellar SDRs lead the pack - create templates and sequences to mirror the best.
• Do More with Less: Seeing pipeline getting thinner and wants AEs to step up alongside the SDR org.
• Crush the Competition: Some reps are better than others at handling CompeteCo – let’s get everyone selling at Club level.

Anything I miss?

- Armand</td></tr>
</table>

<table>
<tr><td colspan="3">The Exec-to-Exec Multithreading Email</td></tr>
<tr><td colspan="3">Risk: Are we engaged with stakeholders above the decision-making power line?</td></tr>
<tr><td>🟢 Yes, some above the line</td><td>🟡 No, below the line only</td><td>🛑 Don’t know</td></tr>
<tr><td>If you’re not in the green...</td><td colspan="2">Try: The Recap Email</td></tr>
<tr><td>The best time to get engaged with power is live on a discovery call when things are going well.

But let’s say the timing isn’t there. Or your champion can’t get you there. The Exec-to-Exec Multithreading Email is a stellar way to access power without going around your champion’s back.

You’ll want to have your CXO (CEO, CRO, VP of Sales) send this email to their CXO
- asking for an exec-to-exec conversation to reaffirm your team’s commitment to supporting the prospect as they become a customer.</td><td colspan="2">Jill,

I’m Manny, CEO of Outreach. Armand on our team told me that he’s been working with Jane on your team and has spoken highly of the revenue org you run at Acme co.

I’d love to meet 1:1 with you to hear how we can best support you as you consider us, and if nothing else, meet a like-minded revenue leader.

Open to meeting Tuesday AM or Wednesday PM next week?

- Manny</td></tr>
</table>

The Executive Recap

Risk: Are multiple personas engaged?

Yes	No	I don’t know

If you’re not in the green...

Let’s say we’ve got that executive engaged now. **Once isn’t enough – you have to STAY threaded** throughout the entire sales cycle.

But you want to do this **without deal-fatiguing them**.

So we’ll leverage the executive recap email to:

- Preserve the executive lines of communication
- Ensure they’re informed on the deal so they don’t show stop it at the end
- Get their input as we gather more information

Try: The Executive Recap

Hey Jill,

We had a great conversation with Jane, who’s absolutely stellar.

No action required here, but as promised **here’s a recap** of what we’ve learned is important to the Acme team so far:

- <u>Optimize the SDR Machine</u>: A few stellar SDRs lead the pack - create templates and sequences to mirror the best.
- <u>Do More with Less</u>: Seeing pipeline getting thinner and wants AEs to step up alongside the SDR org.
- <u>Crush the Competition</u>: Some reps are better than others at handling CompeteCo – let’s get everyone selling at Club level.

We meet with Jane and your Head of RevOps, Bill, next week to do a full-on demo.

Anything we missed or that you want to ensure we cover?

- Armand

<table>
<tr><th colspan="3">The Multithreading Email</th></tr>
<tr><th colspan="3">Risk: How many people are involved in the deal?</th></tr>
<tr><td>🟢 7+ people</td><td>🟡 3-6 people</td><td>🛑 1-2 people</td></tr>
<tr><th>If you're not in the green...</th><th colspan="2">Try: The Multithreading Email</th></tr>
<tr><td>It's critical to never stop multithreading until you have rock solid footing in all of the key departments that you're trying to sell into.

Even if you have a champion, being single-threaded in a single department is a closed-lost deal in the making.

So use this email to multithread across the organization, specifically in this case, across departments.

Whenever possible, use assumptive language to let your champion know you're going to be threading across departments so it's not a surprise.</td><td colspan="2">Bob,

You and I haven't met before, but we've been meeting with Jane who leads revenue for the mid-market sales organization.

We've heard some amazing things are underway at Acme and there's a big push to bolster the pipelines of the AEs, and I imagine there'd be a similar push with you across the ENT sales division.

We'd love to give you a sense of where we've found we could be helpful, and also get your input on anything we've missed.

Open to chatting on Wednesday AM or Thursday PM next week?

- Armand</td></tr>
</table>

And that's a wrap!

Here's where you can get more of where that came from.

The world isn't black and white in sales. You have to be able to do it all as a full-cycle rep.

You can't just use the sequences above, but then pretend like the deals will close themselves

And you can't just be the glorious Club Closer without getting your hands dirty and outbounding your way into your next big opportunity.

So whether you're using Outreach sequences to find your next opp or using Outreach Deal Insights to save at-risk deals one thing's for sure:

Outreach just might be how you create and close your booking to the next President's Club.

Ready to create and close with Outreach? See how today.

Cheers,

- Armand