Sendoso

Quick Win Guide

Best Practices for Enabling Sales & SDR Teams

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We outline tips on how to get your sales and SDR teams sending, examples of effective sends and key metrics you should track to measure your success.

Before rolling out Sendoso to your sales development team, ensure that you all have Touches set up and all relevant integrations in place. Some of the best Touches for SDR teams include eGifts for coffee, lunch/dinner, Amazon, or Wine.com, as well as Sendoso Direct options like succulents or branded treats and swag.

Include information for when reps should use the send either in the notes or title of the Touch. Integrations are critical when it comes to driving adoption because it allows your reps to send from wherever they already work. Here are integrations that SDR teams may want to use …

XANT

Add personalized gifts, branded swag, and eGifts in your sales team's multi-channel Playbooks to drive higher engagement.

SalesLoft

Allow your sales & SDR teams to send personalized gifts, branded swag, and eGifts directly from SalesLoft cadences.

Outreach

Add a personal touch to your prospecting by allowing teams to send items directly from Outreach.

Salesforce

Send items directly from your contacts and leads, measure campaign performance with ROI dashboards.

Initiate First Send

Schedule a kickoff for your team to introduce Sendoso and enable reps to start sending. Be sure to cover the best practices for a 1:1 send (example below):

- **Relevance**: Is the item you're sending relevant to your value prop and/or the prospect? Does it make them feel special or spammed?

- **Specificity**: Is the item specific to something your prospect cares about? (i.e. plants/nature, sweets, wine tasting, books, sales content). Find this info on LinkedIn, Google, or other social media sites.

- **Timeliness**: Is your send landing in their hands in time? Especially when using Address Confirmation, kindly follow up with prospects to ensure they confirm or change their address in a timely manner.

Here is an example of a 1:1 send that an SDR sent to a prospect:

Hey

Thought I would reach out and offer a bit of WFH support. Figured you could do with a boost, so please enjoy this Amazon gift card on Clari.

I did a bit of research, and thought that, as a die-hard Knicks fan, you might enjoy this--hopefully they'll get a star this summer and return to the glory days! In any case, please feel free to use the gift card as you please.

Hope we can find some time to connect once things settle down to talk forecast accuracy, pipeline insights, predictable revenue and the state of Knicks basketball :)

Most importantly, I hope you and loved ones stay safe.

Cheers,

Cameron

At the end of the kickoff, have each rep select one prospect they haven't been able to get a response from before. Then give everyone 15 minutes to research the prospect and come up with both a send and message. After the 15 minutes are over, have each rep share their idea with the rest of the team and then let the team vote on their favorite. Award the winner with a $50 Amazon eGift card sent via Sendoso.

Gamify

Give your sales reps a challenge but setting up a monthly KPI for them to use all of their assigned Sendoso budget. You can also run weekly contests for the best send idea and set up a Slack channel to share wins.

Below is a sample SDR Campaign using Sendoso:

Day 1: Email 1, Call 1, LinkedIn Profile View, Sendoso Send

Day 3: Email 2, Call 2, LinkedIn InMail

Day 6: Email 3, Sendoso Resend, Call 3

Day 9: Email 4, Call 4

Day 12: Email 5, Call 5

Day 15: Sendoso Resend [via Email or LinkedIn], Call 6

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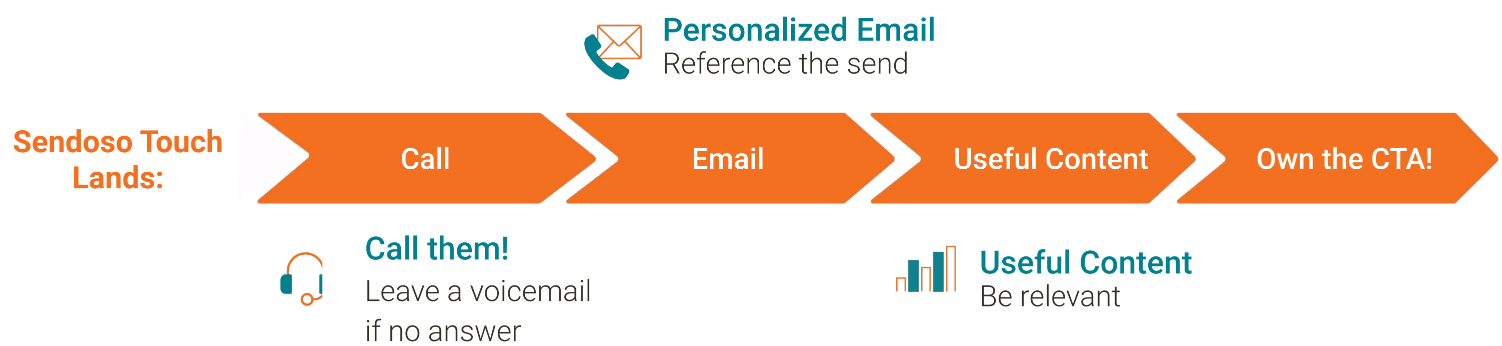
Average number of touchpoints needed to generate a sales conversation

Once a send is opened or redeemed, follow up from your team is critical. Don't expect a prospect to follow up with you; take the next step! Every touchpoint should put the ownership on the sales rep to take the next best action. (You can even outline this in the message with your send: "I'll give you a call ..."

Below is a sample follow-up campaign:

Follow-Up Step 1: Call (If there's no answer, leave a voicemail.)
Follow-Up Step 2: Email 1 (Personalize the message and reference the send.)
Follow-Up Step 3: Email 2 (Include useful content and reference the send.)



Measure & Report

Make sure that every Sendoso send is linked to a campaign in your CRM in order for you to measure the success of your program. Make sure you align with the sales teams to track both meetings booked and attended among the recipients. One easy method is adding a campaign status that the rep can tag the leads. Here is a shortlist of success metrics you should track both at the send level and down the funnel.

- Response Rate (# Addresses Confirmed / Total # Sent)*100
- # Meetings Booked and Meeting Attendance Rate
- Response to Opportunity Rate (# Responses / Total Ops Source)*100
- Pipeline Sourced by Campaign and Pipeline Influenced (# of Ops and ARR)
- For Open Ops Stage Change and Sales Velocity (Pull Stages at Send Date & Compare Change Over Time)
- Closed Won Revenue (# of Ops and Total ARR)

Create regular feedback loops with sales reps highlighting both the aggregate successes and anecdotal success within individual deals. Share them in weekly or monthly team meetings in order to maintain momentum and demonstrate the success of your program.

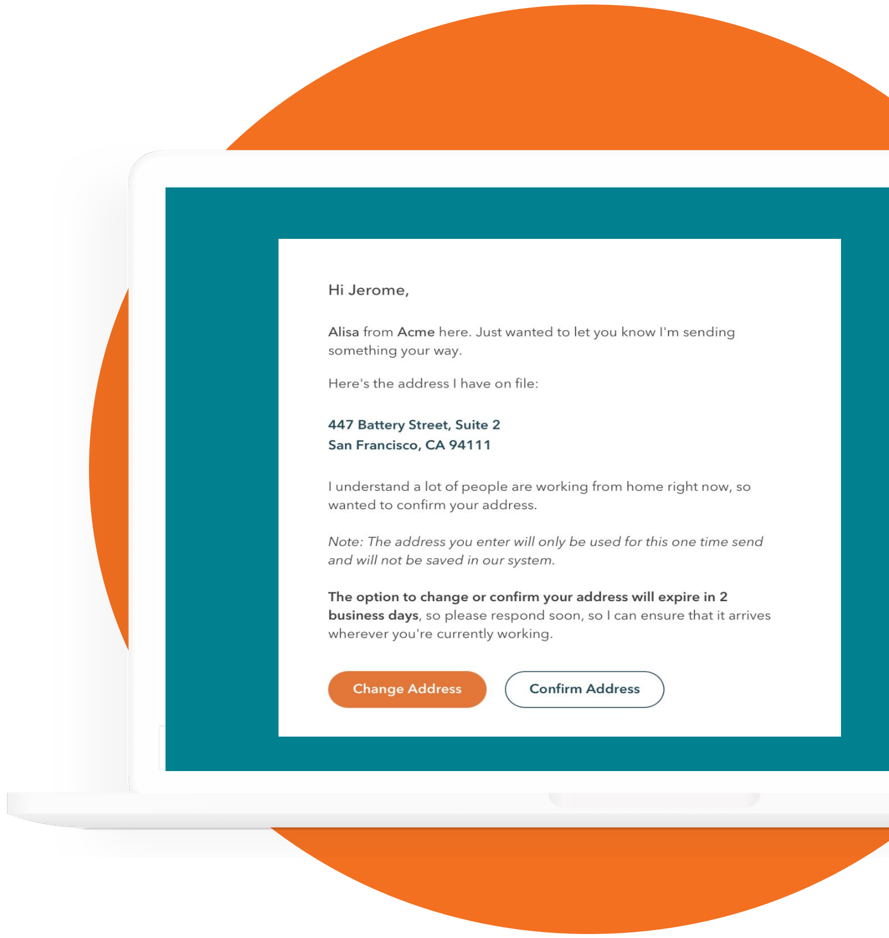
Sendoso

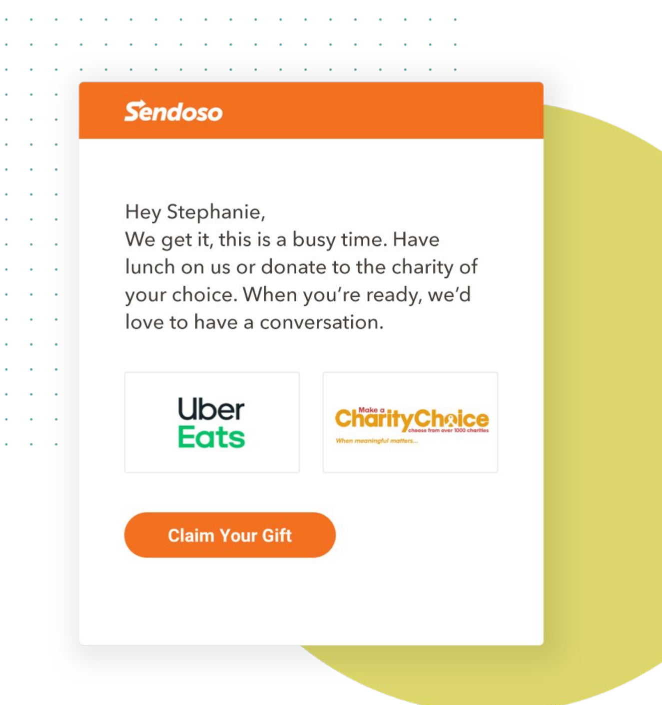
Address Confirmation

Utilize Sendoso's Address Confirmation feature to ensure your sends are shipped to a recipient's best address.

Simply select the Address Confirmation checkbox before hitting "send." The recipient will receive an automated email from you asking them to either change or confirm their address within two business days.

If the recipient needs to make a change, they'll do so on a linked landing page. Once the address is confirmed, the send is fulfilled by Sendoso and the sender receives a delivery confirmation.





Success Snapshot: MX

MX, a digital transformation platform, used Sendoso to activate deals that stood stagnant in the pipeline because their target customers at banks and financial institutions were navigating an influx of customer communications and executing COVID-19 response initiatives.

The MX team enabled sales reps to target deal champions and buyers at stalled accounts with Sendoso Choice eGifts, enabling prospects to choose between a charity or food delivery eGift and apply funds to a charitable organization or a local restaurant of their choosing.

- **$2,000 in campaign spend**
- **$1.2M in opportunities** accelerated to qualified deals
- **$4M in opportunities** brought back to life

[Click here to read more about their campaign](#).

Happy sending! Visit [sendoso.com](#) to learn more.