USING YOUR OPPID™ INSIGHTS TO MAXIMIZE PIPELINE
Opportunity Identification for Sales Development

Sales development serves as an organization's front line, constantly interacting with prospects via phone, email, and other channels.

In this day and age, your prospects are inundated with a lot of information, messages, and communications—it's a lot of noise. The only way to cut through that and get them to listen to your pitch is to speak directly to what they care about.

In order to do that, you need to understand their specific needs, challenges, and environments. And that's the power of OppID™—it delivers the custom intelligence that you simply can't get through any of the usual data sources.

OppID pinpoints qualified accounts, based on your unique criteria, so you can have highly customized and truly differentiated conversations.

Use this guide to ensure that your sales development team gets the most value from your OppID profiles to increase productivity and ultimately drive more pipeline and revenue.

1 *Account Prioritization and Planning*

2 *Outreach*

3 *The Initial Pitch*

4 *The First Meeting*

5 *Individual Training for SDRs*

Drive pipeline ▶

Increase productivity ▼

1 ACCOUNT PRIORITIZATION AND PLANNING

Segments drive action

Among the many benefits of an OppID project is that every account is segmented, using the information from the profile survey, into one of four (or more) categories based on the criteria you specify. You can work with your BAO team to customize the segments based on your needs.

Following are common categories used to prioritize accounts:

BULLSEYE buyers are hot prospects with active initiatives that you want to get into right now.

HIGH-POTENTIAL buyers have current pains and challenges that you can solve, so establishing a relationship can help you shape their buying vision and put you at a competitive advantage.

Accounts in this segment might be experiencing important trigger events like "moving from on-premises to the cloud" or "drastically increased hiring for next 12 months."

GREENFIELD or **WHITESPACE** accounts should be prioritized for appropriate outreach from sales.

NURTURE accounts are prospects that aren't ready for sales outreach, and can be de-prioritized by your team. They should still be added to your marketing database for low-to-no-cost outreach programs and revisited in 9-12 months.

DISQUALIFIED accounts are so categorized if they don't meet your ICP (they may have an incompatible technology stack, for example) or if they have a competitive solution installed and have no intention of switching.

You want to review the disqualified buyers and remove them from your roster—don't waste time chasing prospects with no pipeline potential.

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SAMPLE SEGMENTATION

Throughout this guide, we'll use a real-world example from an actual OppID study conducted into Fortune 2000 organizations to understand Big Data installations, challenges and initiatives.

In this example, the segmentation and segment criteria included:

BULLSEYE
- >500 TB of data
- And is using Microsoft Azure or AWS for cloud
- And has an active initiative for a new or overhaul Big Data solution or Hadoop implementation

BIG DATA/DATA WAREHOUSING BUYERS
- >500 TB of data
- And is using Microsoft Azure or AWS for cloud
- And has one or more active initiatives to implement other Big Data or Data Warehousing solutions within the next 6-12 months and the vendor is not yet selected

BIG DATA PLATFORM CHALLENGES
- >500 TB of data
- And is using Microsoft Azure or AWS for cloud
- And rated current Big Data platform a "C" (A-F scale) or lower and identified one or more challenges with current Big Data solution

NURTURE
- >100 TB of data
- And is using Microsoft Azure or AWS for cloud
- And has no active initiatives and is satisfied with their current Big Data solution

Sample Segmentation - Fortune 2000

- 24%
- 25%
- 31%
- 20%

- 🟧 **Bullseye**
- 🟩 **Big Data/Data Warehousing Buyers**
- 🟦 **Big Data Platform Challenges**
- 🟦 **Nurture**
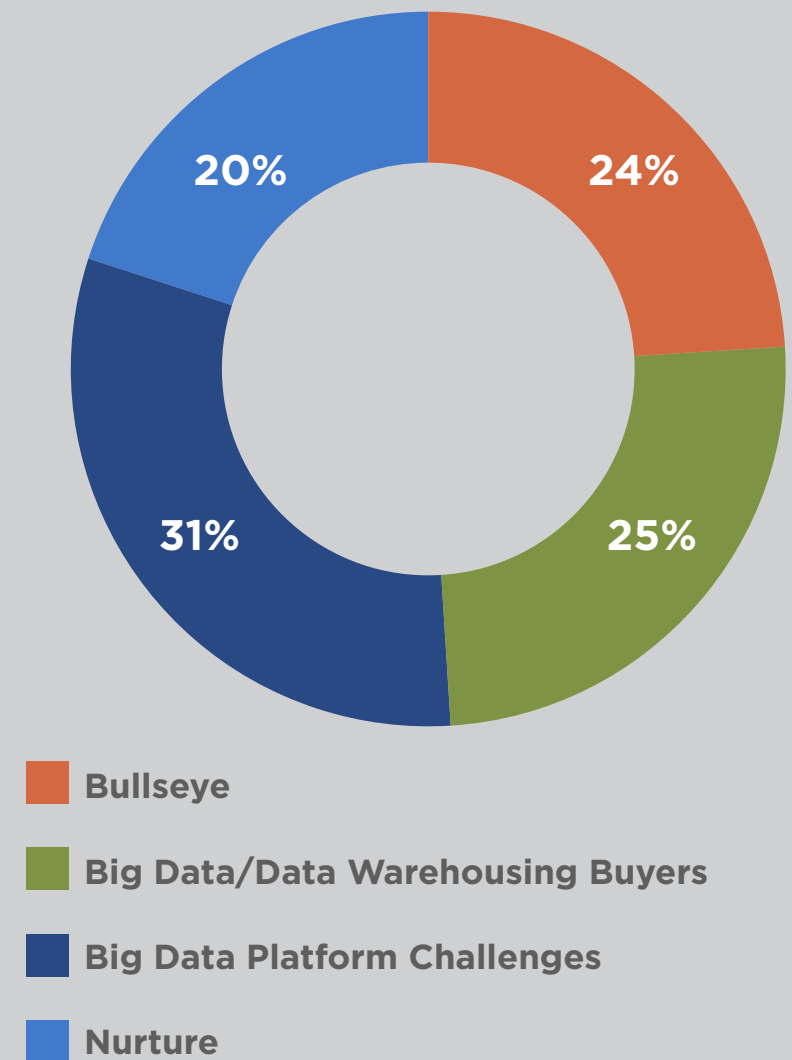
ACCOUNT PRIORITIZATION AND PLANNING *continued...*

Understand the difference between leads and account profiles

The OppIDs aren't leads in the traditional sense; they are account profiles that should be used to craft a tailored action plan for the different segments. With information on their pains and challenges, existing technology environment, trigger events, purchase timeline, and more—information you would otherwise have to gather through a sales discovery Q&A that offers little value to the prospect—you can lead with a pitch that speaks directly to their needs and current stage in the buying process.

Arm the sales development team

Share the OppIDs and your account prioritization and action plan with the inside sales reps or SDRs responsible for initial outreach, whether that's an in-house team or an outside partner.

Tailor your engagement approach based on the current status of each account

Use the information to customize your pitch—and improve your ability to capture the attention of your prospect.
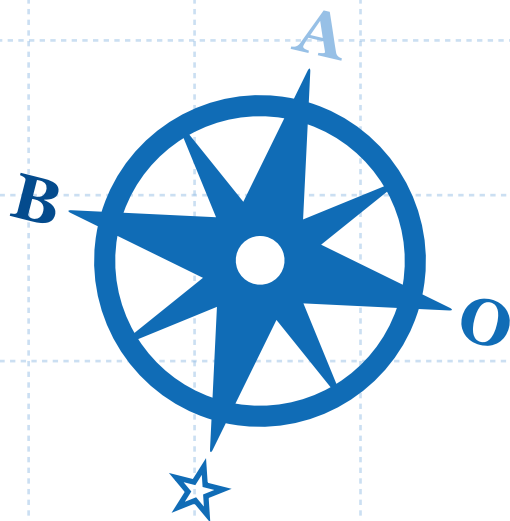
ACCOUNT PROFILE

Company: Globalco | Segment: Big Data/Data Warehousing Buyer

1. Does your organization use (or plan to use) Hadoop for Big Data? — *Yes*

2. Which platform do you currently use for your cloud deployment? — *AWS*

3. How is your organization currently using Big Data solutions and/or management? — *Customer behavior analysis
Predictive analytics*

4. How long has your organization had big data management in place? — *> 3 years*

5. Which Big Data Platform(s) do you currently have in place? — *Competitor 1
Competitor 2*

6. How do you grade your current Big Data Platform? — *Competitor 1: B
Competitor 2: C*

7. What types of challenges do you regularly experience with your Big Data platform? — *Latency/performance
Integration with other applications
Need for real-time capabilities*

8. How large is your organization's Data Warehousing environment? — *751TB - 1PB*

9. What percent of your data is unstructured? — *> 50%*

10. What databases and technologies are currently running in your organization's IT environment? — *Database A
Database B
Database C*

11. What types of general data challenges do you regularly experience? — *Using/analyzing unstructured data
Significant performance issues*

12. Which of the following initiatives does your organization have budgeted? Where are you in the implementation/decision making process? — *Data warehouse optimization
(Discovery/planning)*

13. When do you plan to finalize your decision and begin implementation? — *6-12 months*

Use insights to your advantage

The profile tells you that Globalco, one of your key prospect accounts, has a lot of unstructured data. They're currently using two competitive Big Data tools and are challenged with integration, slowness, and getting real-time data. You should use those insights to your advantage.

On your first sales outreach, you should lead with your solution's strength around ecosystem compatibility, performance, and instant data availability. You can come to the call prepared with examples of other customers who were experiencing similar challenges and show how they were able to solve them with your solution. By speaking to what the customer cares about from the get-go, you'll spark interest and keep them engaged.

If you are already engaged with the prospect, use the information to refine your pitch and drive the conversation to the next step. If you've tried unsuccessfully in the past to get into the account, you can similarly use the insights to target an entry point and craft tailored messaging.

② OUTREACH

Think beyond the contact listed in the profile

Every OppID account profile is gathered via live, phone-based conversations, and includes the contact info for the person who was interviewed by BAO. That's who we spoke with to get the information, but that may not be the right target from a sales perspective. Find the right title/role/seniority based on your targeting and reach out to those contacts using the account insight from the OppID to tailor the message.

Stick with it

This requires perseverance. You cannot simply leave one voicemail and then move on. It takes an average of 27 dials to deliver one pitch—that is, to get the opportunity to present your solution's value proposition in order to secure a future appointment.

And it takes an average of 130 dials to secure one prospect meeting. So don't give up too easily. Since you've done your up-front homework, you know these accounts are worth it.

Get help
from the pros...

BAO has been delivering *Appointment Setting services to* *B2B tech companies for over two* *decades and can help you secure* *meetings with decision makers in* *your target accounts.*

2000   2005   2010   2015   2020

3 THE INITIAL PITCH

Understand the purpose of the call
When you connect with a prospect, use the specific account insights from the OppID to deliver a short pitch that speaks directly to their specific situation. Remember, in this first call, you're not selling your product, you're selling time. The goal is to secure a sales meeting, so stay focused on that objective.

Do not reference the survey
It was performed by a third party and doing so would create confusion and distract from the message you're trying to convey.

Don't assume it will be an easy pitch
It's not a warm call just because they've been profiled.

Lead with a pitch that speaks directly to their needs and current stage in the buying process.

EXAMPLE PITCH

Company: Globalco

Hi, this is <Name> from YourCompany.

We help companies using **AWS cloud** tackle their **latency issues** and **improve overall performance** of their big data solutions.

We'd like the opportunity to talk with you about how we've helped companies like Globalco **analyze their unstructured data**.

I understand you're currently using **Competitor 1** as your big data platform. Many of our customers have found our solution to be superior in **providing real-time capabilities**.

Can we set up a time to learn more about your current challenges, and share some examples of our customers' successes?

Insights in orange taken from the Globalco account profile on page 5.

4 THE FIRST MEETING

Forego the game of 20 questions

Too often, SDRs have to use the initial meeting to ask a lot of questions. It might seem like this conversation is all about the prospect—after all, you are asking about their needs and technology environment—but in fact it's all about you, because the prospect gets little value.

The OppID gives you all the information about the account. So instead of asking a lot of questions, you can lead with solutions and focus on providing answers tailored to their situation. Use those insights to your advantage. Instead of leading with a question, lead with relevant information to help them solve their most pressing challenges. As a result, you'll transform that first meeting from a one-way discovery session into a truly interactive and engaging discussion.

Create preference for your solution

Use competitive insights from the account profiles to more effectively differentiate your offering right from the start. You'll know which strengths to focus on—the specific areas where your solution outshines this particular competitive product—to hit home with the prospect without having to call the out competitor by name.

5 SCHEDULE AN INDIVIDUAL TRAINING SESSION

Our goal is to help your organization get the most value from your OppID profiles

To do that, the BAO team is happy to conduct an individual training session for your organization. The session will be customized to your OppID segments and include best practices and tactical tips for utilizing your OppID profiles.

Please contact your BAO project manager to schedule a training session.

EXAMPLE PREP NOTES

For Globalco first meeting

Key details to include in deck/conversation:
- Challenges of **unstructured data**

- Solution differentiators (focus on strengths vs. **Competitor 1** and **Competitor 2**)

- Ease of integration and partner ecosystem (focus on **Database A**, **Database B**, and **Database C**)

Case studies to highlight:
- **Customer analytics**: Company ABC: Realized cost savings of 60-79%. Easy adoption resulted in accelerated roll out. Improved integration with on Database A, Database B, and Database C.

- **Performance improvements**: Company XYZ: Was able to analyze 54% more unstructured data than prior to deployment. Realized real-time capabilities for customer behavior analysis.

Try to learn more about:
- Buying committee, drivers, and requirements for active **data warehouse optimization** initiative

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