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SalesLoft on SalesLoft

Cadence Best Practices



Q4 2020

	Generate Demand		Build Pipeline		Close Deals		Drive Success *Non-Commercial*			Renew & Expand *Commercial*	
	Event Engage	Nurture	Inbound Response	Outbound	Meeting Setup & Follow up	Closed Lost or Gone Dark	Drive Adoption & Usage	Engage At-Risk Accounts	Exec Customer Alignment	Upsell & Cross-Sell	Renewal
Marketing	✓	✓	✓								
SDR	✓	✓	✓	✓	✓						
AE	✓	✓	✓	✓	✓	✓					
AM/CSM	✓						✓	✓		✓	✓
Exec	✓								✓		

Effective Customer Engagement

Throughout the entire customer journey, the best teams have a consistent, multi-channel cadence to communicate with their buyers and customers. This playbook contains best practices guides for each stage of the customer lifecycle.

Cadence Playbook Contains:

- Frameworks backed by Data Science and proven by SalesLoft customers
- Benchmarks and execution tips for each Cadence
- Step by step explanations for every action across all engagement channels

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Links to Specific Cadence Frameworks

Generate Demand

Event Engage

- Pre-Virtual Event Cadence
- Virtual Event Follow Up

Nurture

- Nurture

Build Pipeline

Inbound Response

- Inbound Response
- Inbound Response Content

Outbound

- Go-to Outbound
- High Volume
- Full Cycle

Close Deals

Meeting Setup and Follow Up

- Meeting Confirmation

Closed Lost or Gone Dark

- Closed/Lost

Drive Success

Drive Adoption and Usage

- Journey Cadence
- Optimize
- High NPS

Engage At Risk Accounts

- Pilot Engagement
- Proactive Action

Exec / Customer Alignment

- Leader Cadence

Renew and Expand

Upsell & Cross-Sell

- New Rep Intro
- Cross Sell

Renewal

- Renewal: 6 Months Out

Bonus Plays

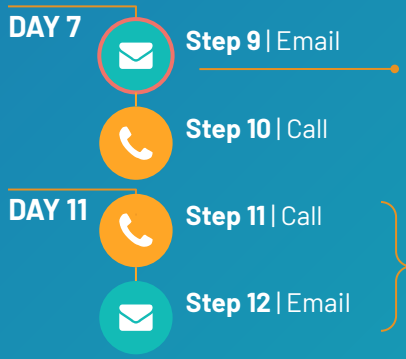
- Hot Leads

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Cadence Key

How to Read the Frameworks In This Guide

- Email
- Phone
- LinkedIn
- Text
- Other
- Direct Mail



Email Steps highlighted in red are meant to be automated. Use cautiously. Templates need to be ready to send with all dynamic fields filled with accurate data.

When Steps are connected, they are meant to be executed on the same day.

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Generate Demand

Event Engage
- Events
-Webinar Follow Up

Nurture
-Nurture

	Generate Demand	
	Event Engage	Nurture
Marketing	✓	✓
SDR	✓	✓
AE	✓	✓
AM/CSM	✓	
Exec	✓	

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Pre-Virtual Event Cadence

Drive Attendance

Cadence Objectives

For the most part, in person events are still not a thing as we head into 2021. This Cadence is built to drive attendance for your virtual events.

Target

Prospects that you are trying to get a meeting with, or even in a deal cycle with. If it's an in person event, target geographically.

Tips and Tricks

- Call out specific speakers or sessions that would be impactful
- Provide free access or discounts where you have the ability to
- Steps must be executed on time, and cadence must start 2 weeks prior to the event
- Marketing should own creating these cadences for every event as Team Cadences, and sharing with Sales to drive usage

Engagement Channels

Email | Social | Text
Phone | Video | Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg | CSM
SDR | AM
AE | Exec

Benchmarks and Goals

2 Weeks

Time until the event. Start cadence 10 Business Days days prior

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Back to Cadences

Event Cadence

6 Steps over 9 Business days

DAY 1



Step 1 | Email

Initial Invite

DAY 4



Step 2 | Email

In-Thread follow up. Will you be able to make it? Here's what you'll get out of it

DAY 5



Step 3 | Call

Call to invite. Leave Voicemail

DAY 7



Step 4 | Email

Space is filling up, I can save you a spot

DAY 8



Step 5 | Call

Will you be able to join? If not, I can schedule time for us after to run through the highlights

DAY 9



Step 6 | Email

Event is tomorrow. I'll keep an eye out for you and share what I learned if you can't make it

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Virtual Event Follow Up

Follow through on Event Attendees

Cadence Objectives

In today's environment, Marketing teams are shifting resources to more interactive webinars for Demand Gen. Drive these leads through to the Sales Team with this Cadence.

Target

Webinar Attendees

Tips and Tricks

- Use Automation Rules to trigger leads directly into this cadence
- Assign the leads to the rep who owns the account, so it can inform their overall account strategy
- The goal here is for the rep who is responsible for the account to start a dialogue around the content of the webinar. Its built for customers and prospects, with the goal of creating an opportunity if possible

Engagement Channels

Email | Social | Text | Phone | Video | Direct Mail

Complexity Level

Easy to Implement | Takes Time | Let Us Help You

Role

Mktg | CSM | SDR | AM | AE | Exec

Benchmarks and Goals

2x Increase

In response rate from email 1 to 2, and 2 to 3. Consistency is key with this cadence. Back half response rates can be significantly higher

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Back to Cadences

Webinar Follow Up

5 Steps over 8 Business Days

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DAY 1

Step 1 | Email

Personalize. Give Related Content. What questions do you have?

DAY 3

Step 2 | Email

In thread reply. Here are the slides in case you needed them

Step 3 | Call

Call to discuss.

DAY 5

Step 3 | LinkedIn

Engage on LinkedIn. Consider tagging the prospect/customer in a related post that gives more info on the topic they were interested in

DAY 8

Step 5 | Email

Invite to your next webinar

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Nurture

Don't Break Up with Target Accounts

Cadence Objectives

This Nurture Cadence is built to be used by all reps from SDR to Closer. It's a club in the bag that can be used in multiple scenarios, from no engagement to situations where timing is off. The goal is to stay connected and bring value.

Target

Prospects who have gone dark or asked to hold off for 3-6 months

---

Tips and Tricks

- The cadence starts 2 weeks in, giving some breathing room
- Use Automation Rules to trigger leads directly into this cadence when a prospecting cadence ends
- This cadence is email only. If the prospect becomes a Hot Lead in SalesLoft, the rep should call to engage from there
- Consider sharing content that is not built by you. Share blog posts from other experts and pull out quick takeaways

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Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

11.5% to **12.3%**
Conversion Rate of Hot Leads

1% to **5%**
Low engagement rates in this cadence are to be expected

Back to Cadences

Nurture

7 Steps over 53 Business days

DAY 13



Step 1 | Email

Thank them for previous engagement. Provide value add content

DAY 26



Step 2 | Email

Value Add Content



Step 3 | LinkedIn Research

Check out their LinkedIn. Is there anything you can like, share, or comment on that they've engaged with recently?

DAY 39



Step 4 | Email

Value Add Content



Step 5 | LinkedIn Research

Check out their LinkedIn. Is there anything you can like, share, or comment on that they've engaged with recently?

DAY 52



Step 6 | Email

Value Add Content

DAY 53



Step 7 | Other

Where should this person go from here?

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Build Pipeline

Inbound Response
- Demo Request
- Content Follow Up

Outbound
- Personalized/Account Based
- High Volume
- Full Cycle

	Build Pipeline	
	Demo Request	Outbound
Marketing	✓	
SDR	✓	✓
AE	✓	✓
AM/CSM		
Exec		

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Inbound Response

Rapid Response for High Priority Leads

Cadence Objectives

Inbound Conversion rates are highest when a rep responds in less than an hour. The goal of this cadence is to rapidly surface leads to reps, automating the first email, so that we can schedule an initial meeting.

Target

Demo Requests and Contact Us Leads

Tips and Tricks

- Use Automation Rules to trigger leads directly into this cadence
- Provide your SalesLoft Meeting Link to make it easier for prospects
- The back half of this cadence is meant to be more the pace of a nurture cadence. Top performing teams will build out a parallel call cadence, triggered by Hot Leads, in order to capitalize on engagement and call at the right time

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Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

22% to **31%**

Benchmark Conversion rate if response time less than 1 hour

40% to **50%**

Goal for Click Rate on Email 1

10% to **20%**

Goal for Reply Rate on Email 1

Leverage Hot Leads and a Call Now Cadence

Back to Cadences

Inbound Follow Up

11 Steps over 27 Business Days

DAY 1



Step 1 | Email
Automation rule pushes inbound lead into the cadence automatically. Email sent immediately, giving calendar link for easy scheduling



Step 2 | Call
First Call. Leave Voicemail

DAY 2



Step 3 | LinkedIn
Personalized connection on LinkedIn

DAY 3



Step 4 | Email
In-thread follow up to first email, scheduled to go out early morning in prospect's timezone



Step 5 | Call
No voicemail

DAY 5



Step 6 | Email
New Thread Email



Step 7 | Call
Leave Voicemail

DAY 10



Step 8 | Email
Lead with Insight Nurture Email

DAY 15



Step 9 | Email
Lead with Insight Nurture Email

DAY 21



Step 10 | Email
Lead with Insight Nurture Email

DAY 27



Step 11 | Email
Lead with Insight Nurture Email

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Inbound Response Content Download

Continue to Deliver Value to Your Audience

Cadence Objectives

Give reps the chance to start a conversation with a lead who has engaged with Marketing content. The goal is to deliver value first, and hope it leads to a deeper conversation. Use this cadence if you've determined you want the follow up coming 1-1 from the Account Owner

Target

Content Download Leads

Tips and Tricks

- Use Automation Rules to trigger leads directly into this cadence
- Assign the leads to the rep who owns the account, so it can inform their overall account strategy
- This cadence is email only. If the prospect becomes a Hot Lead in SalesLoft, the rep should call to engage from there
- Emails should be high on value related to original content, low on hard call to action

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Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

11.5% to **12.3%**

Conversion Rate of Hot Leads

Leverage Hot Leads and a Call Now Cadence

Back to Cadences

Content Download

4 Steps over 16 Business Days

DAY 1



Step 1 | Email

Give Related Content. Provide Calendar for Scheduling

DAY 4



Step 2 | Email

In thread reply. Here's another related article

DAY 9



Step 3 | Email

Have you implemented the content yet? Any Questions

DAY 16



Step 4 | Email

Thanks again

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Go-to Outbound Prospecting

Turn Cold Prospects into Opportunities

Cadence Objectives

Outbound Cadence built to support your teams general prospecting. Can be used as a template to support multiple verticals or personas. Goal is to schedule an initial meeting with a cold prospect.

Target

High Priority Decision Makers within your target accounts or territory. Use this cadence to connect with your buyer.

Tips and Tricks

- 20% Personalization of Email 1 leads to 2x increase in response rate
- Consider using Video in the 2nd or 3rd email step
- LinkedIn steps provide opportunity to get creative and engage over social
- Last "Other" step is a holding tank. Consider using Automation rules to send them straight into a Nurture Cadence
- Refer to our messaging guide for ideas on building a content library

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Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

77% to **91%**

Increase in response rate when using multiple channels

20% to **30%**

Goal for Open Rate

5% to **7%**

Goal for Reply Rate on Email 1

Back to Cadences

Go-to Outbound Prospecting

14 Steps over 26 Business Days

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DAY 1

Step 1 | Call
First Call. Leave Voicemail

Step 2 | Email
First email. Personalize based on the research you've done on the prospect

DAY 2

Step 3 | LinkedIn
Connection request on LinkedIn

DAY 3

Step 4 | Call
No voicemail, follow up with an email

Step 5 | Email
In-thread follow up to first email

DAY 6

Step 6 | Email
New email thread. Consider Vidyard for this step

DAY 7

Step 7 | Call
Leave VM referring back to Video

DAY 9

Step 8 | LinkedIn
Engage on LinkedIn where possible. Consider InMail. Like, Comment, Share. At the very least, view their profile.

DAY 11

Step 9 | Call
Leave Voicemail

Step 10 | Email
Fourth Email. Potentially Automate

DAY 16

Step 11 | Email
Fifth Email. Potentially Automate

DAY 21

Step 12 | Call
Leave Voicemail

DAY 25

Step 13 | Email
Final Email. Potentially Automate

DAY 26

Step 14 | Other
Where should this person go from here? Anything else on social you can do to connect? Move to Nurture cadence?

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High Volume Outbound Prospecting

Scaled Prospecting with an Emphasis on Speed and Calls

Cadence Objectives

Outbound Cadence built for teams with a large ICP or for prospects where it doesn't make sense to personalize every message. Goal is to schedule an initial meeting with a cold prospect.

Target

Lower Priority Decision Makers within your target accounts or territory. Ensure that messaging is highly specific to the problems you are solving.

Tips and Tricks

- First email should be built to personalize, but fine to send without it
- Research and data clean up should be done during initial call step
- Most emails in this cadence are automated. A/B Test and tweak quarterly

Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

77% to **91%**

Increase in response rate when using multiple channels

5% to **10%**

Goal for Phone Connection Rate

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Back to Cadences

High Volume Outbound Prospecting

15 Steps over 14 Business Days

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DAY 1

Step 1 | Call
First Call. Leave Voicemail

Step 2 | Email
First email. Personalize based on the research you've done on the prospect

DAY 2

Step 3 | Call
Morning Call. No VM

Step 4 | Call
Afternoon Call. No VM

DAY 4

Step 5 | Call
Leave voicemail, follow up with an email

Step 6 | Email
In-thread follow up to first email

DAY 5

Step 7 | LinkedIn
Connection Request on LinkedIn

DAY 7

Step 8 | Email
New email thread. Consider a templated Vidyard for this step

Step 9 | Call
Leave VM referring back to email

DAY 11

Step 10 | Call
Morning call

Step 11 | Email
Fourth Email

DAY 12

Step 12 | Call
Afternoon Call

DAY 14

Step 13 | Call
Final call. Leave Voicemail

Step 14 | Email
Final Email

DAY 17

Step 15 | Other
Where should this person go from here? Anything else on social you can do to connect? Move to Nurture cadence?

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Full Cycle Outbound Prospecting

Fill Your Pipe and Spend More Time Closing

Cadence Objectives

Built for full cycle reps who are focused on closing deals. Gaps are extended between steps, and the cadence runs over the course of a month. Goal is to build credibility and schedule an initial meeting.

Target

High Priority Decision Makers within your target accounts or territory. Use this cadence to connect with your buyer.

Tips and Tricks

- First email should be heavily personalized to the individual prospect
- Consider using Video in the 2nd or 3rd email step
- Leverage Linkedin to like, comment, or generally engage with the prospect

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Engagement Channels

Email | Social | Text
Phone | Video | Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg | CSM
SDR | AM
AE | Exec

Benchmarks and Goals

77% to **91%**

Increase in response rate when using multiple channels instead of single

12.5%

Increase in Response Rate with Video

5% to **7%**

Goal for Reply Rate on Email 1

Back to Cadences

Full Cycle Outbound Prospecting

13 Steps over 26 Business Days

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DAY 1

Step 1 | LinkedIn
Check that all person and company data is correct for dynamic tags. Take the opportunity to follow the prospect on LinkedIn while doing research, and enter that research into "Notes"

Step 2 | Email
First email. Personalize based on the research you've done on the prospect

DAY 2

Step 3 | Call
First Call. Leave Voicemail Referencing Email

DAY 4

Step 4 | Call
No voicemail, follow up with an email

Step 5 | Email
In-thread follow up to first email

DAY 5

Step 6 | LinkedIn
Personalized connection request on LinkedIn

DAY 7

Step 7 | Call
Leave VM referring back to email

DAY 9

Step 8 | Email
New email thread. Consider Vidyard for this step

DAY 12

Step 9 | Call
Morning call

DAY 16

Step 10 | Email
Fourth Email

DAY 21

Step 11 | Call
Afternoon Call

DAY 25

Step 12 | Email
Final Email

DAY 26

Step 13 | Other
Where should this person go from here? Anything else on social you can do to connect? Move to Nurture cadence?

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Close Deals

Meeting Setup and Follow Up
- Meeting Confirmation
- Deal Progression

Closed Lost or Gone Dark
- Closed/Lost

	Close deals	
	Meeting Setup and Follow Up	Closed Lost or Gone Dark
Marketing		
SDR	✓	✓
AE	✓	✓
AM/CSM		
Exec		

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Meeting Confirmation

You Worked Hard for That Meeting. Make Sure it Happens

Cadence Objectives

Both SDRs and AEs can take steps to improve show rates on meetings that they set. The goal of this Cadence is to ensure that the meeting happens.

Target

Prospects who you've scheduled a meeting with

Tips and Tricks

- You should put someone in this cadence as soon as you schedule the meeting
- After step one, you'll need to align due dates of the next steps based on the meeting date
- Call step is optional

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Engagement Channels

Email | Social | Text
Phone | Video | Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg | CSM
SDR | AM
AE | Exec

Benchmarks and Goals

Reduce No-show Rates from
40% to **10%**

Back to Cadences

Meeting Confirmation

4 Steps from Meeting Set to Meeting Completed

Step 1: Email
Confirm Meeting after scheduling and send calendar invite

Step 2: Email
Send Agenda the day before the call

Step 3: Call
Optional call day of meeting

Step 4: Email
Day of meeting confirmation email

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Closed/Lost Nurture

Can't win them all (right now)

Cadence Objectives

In sales, even the best reps can bat .250 - How do you stay engaged with the deals you don't win? This cadence is meant to keep you engaged when a prospect goes with a competitor or delays a decision 6-12 months.

Target

Prospects from deals you have lost

Tips and Tricks

- First Email is your chance to thank them for their consideration, and promise to stay in touch
- Cadence is built to last 6 months, with an email once a month
- Use LinkedIn to stay engaged
- Consider sharing content that is not built by you. Share blog posts from other experts and pull out quick takeaways

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Engagement Channels

Email	**Social**	**Text**
Phone	**Video**	**Direct Mail**

Complexity Level

- **Easy to Implement**
- **Takes Time**
- **Let Us Help You**

Role

Mktg	**CSM**
SDR	**AM**
AE	**Exec**

Benchmarks and Goals

5% to **10%**

Goal for Click Rate to show your content is resonating. A/B Test your emails

15% to **25%**

Goal for % of opportunities revived

Back to Cadences

Closed/Lost Nurture

10 Steps over 102 Business days

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DAY 2

Step 1 | Email

Thank them for their evaluation

DAY 23

Step 2 | Email

It's been about a month. How are things going?

DAY 35

Step 3 | LinkedIn

Engage on LinkedIn

DAY 45

Step 4 | Email

Value Add Content

DAY 59

Step 5 | LinkedIn

Engage on LinkedIn

DAY 62

Step 6 | Email

Value Add Content

DAY 75

Step 7 | LinkedIn

Engage on LinkedIn

DAY 86

Step 8 | Email

Value Add Content

DAY 101

Step 9 | Email

Is timing better now?

DAY 102

Step 10 | Other

Where should this person go from here?

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Deal Progression

Make sure you get next steps

Cadence Objectives

The goal of this cadence is to ensure you moves opps to the next stage in the deal cycle. The timing of the steps is less important, the goal is that we stay in front of them.

Target

Prospects after an initial meeting

Tips and Tricks

- Email 1 is your recap email
- Lengthen the cadence and extend spacing between steps to align with your deal cycle.
- Use other steps as a reminder to engage. Knowing the deal, what makes the most sense? Call? Email? LinkedIn?
- Create and maintain a bank of high value, low ask email templates for closers to use and position themselves as experts when reaching out throughout the cycle

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Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Deal Progression

Adjust to fit typical deal cycle

Short Cycle Example

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DAY 1

Step 1 | Email

Send Recap and lay out next steps

DAY 1

Step 2 | LinkedIn

Connect on LinkedIn

DAY 3

Step 3 | Other

How do we move the deal forward?

DAY 5

Step 4 | Email

Value Add Content

DAY 7

Step 5 | LinkedIn

Engage with content on LinkedIn if they have shared anything recently

DAY 9

Step 6 | Other

How do we move the deal forward?

DAY 13

Step 7 | Other

How do we move the deal forward?

DAY 18

Step 8 | Other

How do we move the deal forward?

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Deal Progression

Adjust to fit typical deal cycle

4 Month Cycle Example

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DAY 1

Step 1 | Email

Send Recap and lay out next steps

DAY 1

Step 2 | LinkedIn

Connect on LinkedIn

DAY 10

Step 3 | Other

How do we move the deal forward?

DAY 11

Step 4 | Email

Value Add Content

DAY 20

Step 5 | LinkedIn

Engage with content on LinkedIn if they have shared anything recently

DAY 31

Step 6 | Other

How do we move the deal forward?

DAY 40

Step 7 | Other

How do we move the deal forward?

DAY 55

Step 8 | Other

How do we move the deal forward?

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Drive Success

Drive Adoption and Usage
- -Journey Cadence
- -Optimize
- -High NPS

Engage At Risk Accounts
- -Pilot Engagement
- -Proactive Action

Exec / Customer Alignment
- -Leader Cadence

	Drive Success *Non-Commercial*		
	Drive Adoption & Usage	Engage At-Risk Accounts	Exec Customer Alignment
Marketing			
SDR			
AE			
AM/CSM	✓	✓	
Exec			✓

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Journey Cadence

Educate Your Customers Throughout the Year

Cadence Objectives

When a handoff is made from implementation to Success, this cadence kicks off to make sure that CS is providing customers with the latest information they need to be successful.

Target

Main POCs from customers in your book of business

Tips and Tricks

- Cadence is heavily automated so no one slips through the cracks
- Use short burst intervention cadences to supplement, triggered at the other step "checkpoints:
- Other steps serve as a reminder to review the account and take action where needed
- Cadence lasts 258 business days, which translates to a full calendar year

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Engagement Channels

Email	Social	Text
Phone	Video	Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

Audit/Update Content on a **MONTHLY** basis

Back to Cadences

Year Long Journey Cadence

19 Steps over 258 Business Days

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DAY 1
Step 1 | Email
Email introduction

Step 2 | LinkedIn
Connect on LinkedIn

DAY 4
Step 3 | Email
In-thread follow up email, with access to all resources at their disposal

DAY 20
Step 4 | Other
1 Month Checkpoint. Any Action Needed?

DAY 32
Step 5 | Email
New thread with helpful resources. Is there anything they need help with? We're 45 Days in at this point

DAY 64
Step 6 | Other
3 Month Checkpoint. Is there a need to kick off any low usage Cadences?

DAY 68
Step 7 | Email
Value add email, updated list of upcoming webinars and resources

DAY 86
Step 8 | Email
Value add email, updated list of upcoming webinars and resources

Step 9 | LinkedIn
Light social touch. View on LinkedIn, like or comment where it makes sense

DAY 107
Step 10 | Email
Value add email, updated list of upcoming webinars and resources

DAY 130
Step 11 | Other
6 Months Checkpoint. Begin having renewal discussions if applicable

DAY 140
Step 12 | Email
Value add email, updated list of upcoming webinars and resources

DAY 165
Step 13 | Email
Value add email, updated list of upcoming webinars and resources

DAY 191
Step 14 | Other
9 Month Checkpoint

DAY 214
Step 15 | Email
Value add email, updated list of upcoming webinars and resources

Step 16 | LinkedIn
Light social touch. View on LinkedIn, like or comment where it makes sense

DAY 236
Step 17 | Email
Value add email, updated list of upcoming webinars and resources

DAY 257
Step 18 | Email
Value add email, updated list of upcoming webinars and resources

DAY 258
Step 19 | Other
1 Year Checkpoint

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Optimize

Find and Communicate Areas for Improvement

Cadence Objectives

Deep dive into customer's utilization of the platform and opportunity to highlight areas of improvement.

Target

Customers who are 6 months into the partnership

Tips and Tricks

- Content should be heavily personalized to the customer
- Using a Sending Platform like Sendoso or Alyce makes it easy to send gifts to customers
- This Cadence helps CSMs stay on track with the steps they need to take at 6 months into the relationship

Engagement Channels

Email	Social	Text
Phone	Video	Gifts

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

11%

Increase in engagement with gifts

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Back to Cadences

Optimize

6 Steps over 15 Business days

DAY 1



Step 1 | Email

Optimization Call CTA & Vidyard. Video & questions to consider when booking a meeting

DAY 3



Step 2 | Email

In thread, follow-up. Around suggested questions

DAY 7



Step 3 | Other

Create the deck for calls



Step 4 | Call

Make the optimization call

DAY 8



Step 5 | Email

Key takeaways and the recorded call

DAY 15



Step 6 | Other

Give a gift. Send $20 to customer

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High NPS

Leverage Your Advocates

Cadence Objectives

Determine what led to the high score and thank them for being an advocate.

Target

Users that have given High NPS Scores

Tips and Tricks

- See if they would be willing to provide a review on G2Crowd or TrustRadius
- Use Sending Platform to thank them with a gift
- Trigger the cadence with an Automation Rule

Engagement Channels

Email	Social	Text
Phone	Video	Gift

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

9 or Higher

Score that triggers the cadence

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Back to Cadences

High NPS

5 Steps over 8 Business days

DAY 1



Step 1 | Other

Review Accounts of High Score Providers. Determine anomalies or optimization recommendations



Step 2 | Email

Personalized Message. Thanks you & includes link to book time with a CSM to discuss reasoning for high score

DAY 4



Step 3 | Email

In Thread reply with link to review

DAY 7



Step 4 | Other

Sendoso Gift. Send a small gift to thank them for the high score

DAY 8



Step 5 | Other

Update the Data. Document whether call was had and log it into Conversation Intelligence

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Pilot Engagement

Driving Adoption is Critical During A Pilot

Cadence Objectives

The goal of this cadence is to convert 1 Month Pilots into a paying customer. It's build to drive engagement and adoption.

Target

Pilot Users

Tips and Tricks

- This Cadence assumes that you've done the work up front and have a clear schedule with the customer for the next month
- It is critical that steps are completed on time
- Relationship with main POC is critical, as they will need to forward emails to the team
- Use the weekly emails to gamify adoption. Shout out great users, and consider using a sending platform for gifts during the pilot
- Ask our team for the 2 and 3 month variations to better suit your sales cycle

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Engagement Channels

Email	Social	Text
Phone	Video	Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

1 Month

Pilot Length in this Example

Back to Cadences

Pilot Engagement

7 Steps over 16 Business days

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DAY 1



Step 1 | Email

Send pilot announcement email template to executive sponsor (including training and check in dates) Executive Sponsor to forward to team.



Step 2 | Other

Licenses provisioned. Executive Sponsor adds reps as an admin. Licenses Allocated to team. First virtual training session has been scheduled.

DAY 6



Step 3 | Email

Send gamification email and shout outs

DAY 11



Step 4 | Email

Send adoption survey to users



Step 5 | Other

Start of Week 3. Ensure that Pilot Review is scheduled.

DAY 16



Step 6 | Email

Send final gamification email and shout outs



Step 7 | Other

Last week of pilot. Ensure all steps on Pilot Plan are completed and secure signed contract this week

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Proactive Action

Identify When Teams are Struggling and Give Them a Hand

Cadence Objectives

This is a short burst intervention cadence, built to be used proactively by CSMs when they recognize an issue like low usage or other yellow flags

Target

Teams that need a helping hand

Tips and Tricks

- Use Video to personalize the content and show that you're here to help
- This is a quick cadence meant to be used to respond swiftly when a problem is recognized. Create a library of these cadences and have them at your disposal to deploy at any point during the Journey Cadence

Engagement Channels

Email	Social	Text
Phone	Video	Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

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Back to Cadences

Proactive Action

6 Steps over 9 Business Days
Structure can be replicated for multiple use cases

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DAY 1

Step 1 | Email
Address specific issue and offer guidance

DAY 3

Step 2 | Email
In thread reply. More information, how can I help?

Step 3 | Call
Call to discuss.

DAY 5

Step 3 | LinkedIn
Engage on LinkedIn where appropriate

DAY 8

Step 5 | Email
Additional resources

DAY 9

Step 6 | Other
Is the problem resolved? Once this step is completed, they will continue down the Journey Cadence track

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Leader Cadence

Build Strong Relationships

Cadence Objectives

For Executive Leadership to maintain relationships with other leaders after an initial meeting with a customer

Target

Executive Leadership within your customer base

Tips and Tricks

- Connect on LinkedIn and check daily for promotions, new roles, birthdays
- Send personal videos when these types of events occur, as one off emails in parallel with this cadence

Engagement Channels

Email	Social	Text
Phone	Video	Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

30+

Quarterly Goal of Customers In Cadence

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Back to Cadences

Leader Cadence

3 Steps over 86 Business days

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DAY 1



Step 1 | Email

Send Video Recap of Meeting

DAY 26



Step 3 | LinkedIn Research

Check out their LinkedIn. Is there anything you can like, share, or comment on that they've engaged with recently?

DAY 86



Step 6 | Email

Email to check in and see how things have gone since meeting

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Renew and Expand

Upsell & Cross-Sell
- New Rep Intro
- Cross Sell

Renewal
- Renewal: 6 Months Out

	Renew and Expand	
	Upsell & Cross-Sell	Renewal
Marketing		
SDR		
AE	✓	
AM/CSM	✓	✓
Exec		

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New Rep Intro

Set Yourself Up as a Resource for Your Customers

Cadence Objectives

Territory changes happen. Sometimes you come in new and take over someone's book. This Cadence is built to help you introduce yourself and position yourself as a trusted advisor. The goal is that this leads to a new opportunity.

Target

Main POC's and Other Decision Makers within your assigned book of current customers

Tips and Tricks

- First email should include actionable insights about the team's success
- Leverage LinkedIn to build a relationship throughout the cadence
- Content should be value add but also highlighting products that the team may not be taking advantage of

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Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

25% to **30%**

Response Rate Goal on Email 1

10% to **15%**

Goal for Conversion Rate into Opportunity

Back to Cadences

New Rep Intro

10 Steps over 13 Business Days

DAY 1

Step 1 | Email
Personalized email introduction with actionable insight on the account

Step 2 | LinkedIn
Connect on LinkedIn

DAY 2

Step 3 | Call
Call, Leave Voicemail

DAY 3

Step 4 | Call
No Voicemail

Step 5 | Email
In-thread follow up to first email

DAY 5

Step 6 | LinkedIn
Research step. Like, Comment, Engage

DAY 7

Step 7 | Email
Third Email offering a call to align with goals for the team

DAY 12

Step 8 | Email
Final email. Let me know how I can help! Leave Calendar Link

Step 9 | Call
Voicemail

DAY 13

Step 10 | Other
Is there someone else you should be reaching out to?

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Cross Sell

Introduce New Products and Expand to New Teams

Cadence Objectives

In each of your accounts, is every person in the company using your product that could be? The goal of this cadence is to connect with leaders outside of your main POC and show the value that other teams have already gotten from your product.

Target

Leaders of new teams within an account, Executive leaders, and Leaders who are not using all of you company's products

Tips and Tricks

- Create a case study of sorts that shows how other teams within their organization are benefiting from your product
- Leverage LinkedIn to build a relationship throughout the cadence
- Use Video if you can to show real world examples inside your product

Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

- Easy to Implement
- Takes Time
- Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks and Goals

12.5%
Increase in Response Rate with Video

10% to **15%**
Goal for Conversion Rate into Opportunity

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Back to Cadences

Cross Sell

10 Steps over 13 Business Days

DAY 1

Step 1 | Email
Show how other teams are using successfully

Step 2 | LinkedIn
Connect on LinkedIn

DAY 2

Step 3 | Call
Call, Leave Voicemail

DAY 4

Step 4 | Call
No Voicemail

Step 5 | Email
In-thread follow up to first email. Provide Calendar for scheduling

DAY 5

Step 6 | LinkedIn
Research step. Like, Comment, Engage

DAY 7

Step 7 | Email
Video Email of Product

Step 8 | Call
Voicemail referencing video

DAY 12

Step 9 | Email
What other teams could benefit?

DAY 13

Step 10 | Other
Is there a different team you should be reaching out to?

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Renewal: 6 Months Out

Start Early to Secure Renewal

Cadence Objectives

Alert your customers of their upcoming renewal, and identify blockers as early as possible.

Target

Customers with an upcoming renewal

Tips and Tricks

- There is adequate time between touches in this cadence to remain highly personalized with the messages you send
- Other steps serve as reminders of where you are in the process and how much time is left to secure Renewal
- Use Renewal Dates in Salesforce to trigger this cadence automatically with an automation rule

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Engagement Channels

Email | Social | Text
Phone | Video | Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg | CSM
SDR | AM
AE | Exec

Benchmarks and Goals

6 MONTHS

Time until Renewal

Back to Cadences

Renewal: 6 Months Out

16 Steps over 129 Business days

DAY 1

Step 1 | Email
Ask to schedule discovery call with renewal being almost 6 months out

Step 2 | LinkedIn
Light social touch. View on LinkedIn, like or comment where it makes sense

DAY 2

Step 3 | Call
Call, Leave Voicemail

DAY 4

Step 4 | Call
No Voicemail

Step 5 | Email
In-thread follow up email, offering calendar for scheduling an intro call

DAY 5

Step 6 | Other
6 Months from Renewal. Were you able to schedule Discovery and confirm next steps? Kickoff any intervention needed

DAY 50

Step 7 | Other
Almost 3 months out from Renewal.Make Final Preparations

DAY 59

Step 8 | Email
Send email to confirm timeline and alignment, Give access to calendar to schedule call if needed

DAY 80

Step 9 | Other
Almost 2 months out from Renewal.Make Final Preparations

DAY 81

Step 10 | Email
Send over pricing proposal/contract. Schedule time to review

Step 11 | Call
Call, Leave Voicemail to schedule time

DAY 82

Step 12 | Call
No Voicemail

Step 13 | Email
In-thread follow up email, offering calendar for scheduling an intro call

DAY 107

Step 15 | Other
30 Days out. Is Renewal Secured?

DAY 129

Step 16 | Email
Thank You email

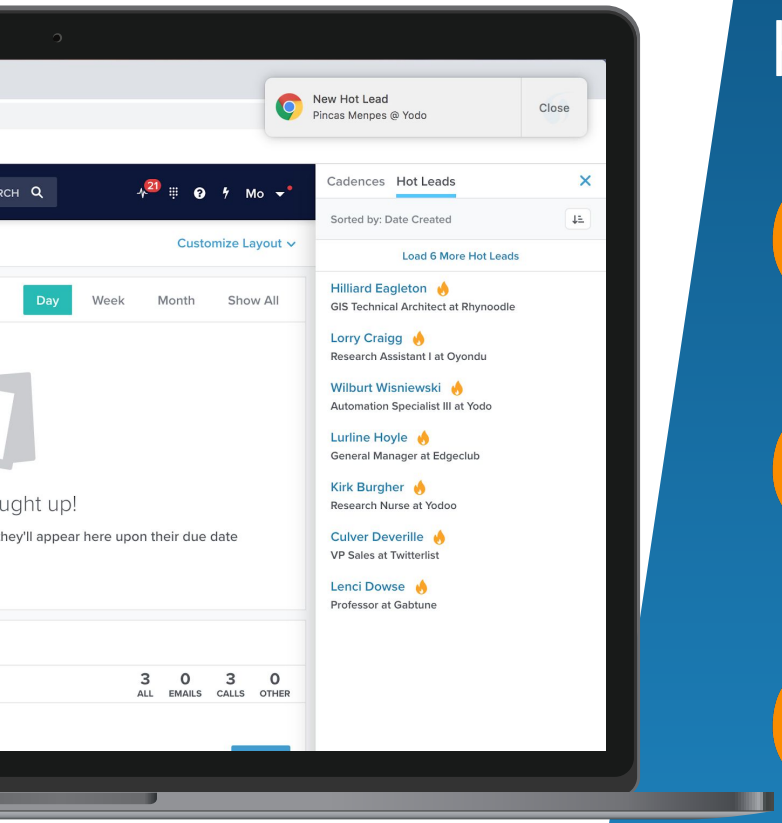
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Bonus:
Hot Leads Cadence



Hot Leads Cadence



Faster Conversion

Connect with your buyers at the right time by listening to and immediately acting on what your prospects *aren't* saying. Catch them in the right mindset so you're not interrupting their day, you're improving it.

3 Step Cadence

Call, Social, Call

If we don't connect, they flow right back into their normal cadence

Pro tip: No Stage Change

Used by All Teams

With less calls in nurture cadences, this helps to make sure reps are using all channels at the right time

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Hot Leads Call Now

Surface Highest Engaged Prospects to your Sellers

Cadence Objectives

In many of our more passive Nurture cadences, we let automation take over with very few phone calls. This cadence is meant to be triggered and ran in the background, surfacing immediate calls to reps when a prospect crosses the threshold you define

Target

SalesLoft Hot Leads

Tips and Tricks

- Tailor your formula for hot leads based on feedback from the team, using the inputs of email opens, clicks, and website views
- Use an Automation Rule to send Hot Leads directly into this Cadence
- When complete, these contacts will continue down whatever track they are on. This cadence is meant to run in parallel with their current cadence

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Engagement Channels

Email | Social | Text | Phone | Video | Direct Mail

Complexity Level

Easy to Implement | Takes Time | Let Us Help You

Role

Mktg | CSM | SDR | AM | AE | Exec

Benchmarks and Goals

7%

Conversion Rate Increase of Hot Leads vs baseline

Back to Cadences

Hot Leads

3 Steps over 2 Business Days

DAY 1



Step 1 | Call

Call to connect

DAY 2



Step 2 | LinkedIn

Engage on LinkedIn where applicable. Like, Comment, Share. Even a profile view will help



Step 3 | Call

Call to connect. Leave Voicemail

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