Outbound Campaigns
Best Practices Draft.1

Executive Summary

The purpose of this document is to highlight the best practices that occur to create an effective campaign based around outbound cadences and scripts to make the outbound process as effective as possible.

Table of Contents

Prepare for the Campaign

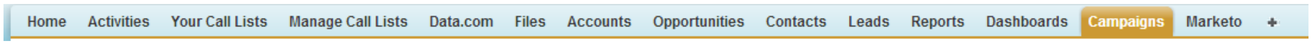
The BDM, SDR, etc. should schedule a time to meet and draft the following:

1. Outline Goal
    a. What do we want out of this campaign?
    b. What we offering prospects?
    c. Additional Logistics
        i. Need/Pain
        ii. Number of Accounts
        iii. Number of Contacts per Account
        iv. Titles to target
2. List Research
    a. How to find companies that fit the ideal client profile and goal of this outreach
    b. See full documentation on List Research for more information on this topic
3. Cadence
    a. Touch Definitions (Call, Email, LinkedIn Connection, etc.)
    b. Touch Quantity
    c. Touch Frequency
    d. See full documentation on Cadences for more information on this topic
4. Create Scripts
    a. Emails
    b. Phone (Talking Points)
    c. Voicemail Messages
    d. See full documentation on Script Creation for more information on this topic

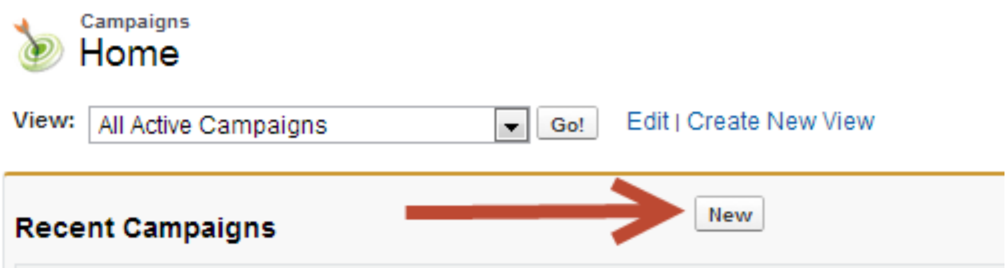
We recommend you create a campaign brief with the above outline in MS Word. This document can then be uploaded to the campaign record in Salesforce for collaboration and reference.

Create the Campaign

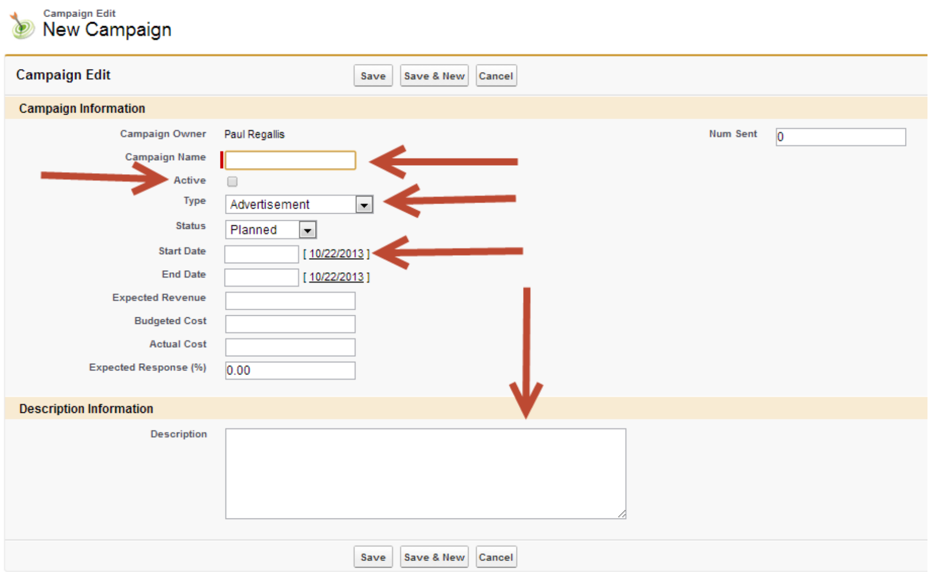
1. Click on the Campaigns Tab



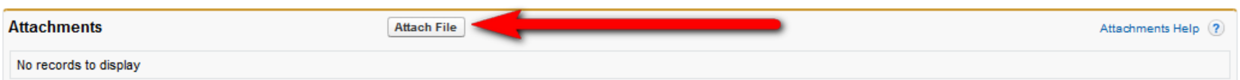
2. Click on 'New'



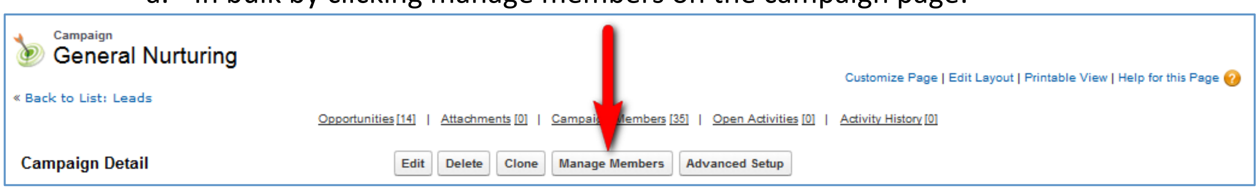
3. Populate Mandatory Fields:
    a. Campaign Name
        i. In the format of:
            - (Initials)-(YEAR.MONTH.DAY)-(NAME OF CAMPAIGN)
            - Example: JM-2013.10.27-SDR Day
    b. Click the check box for 'Active'
    c. Type
        i. Use the dropdown box to choose the most accurate description of the outreach
        ii. If one does not exist, reach out to Joe for its creation.
    d. Start Date
        i. The day you plan to kick off the campaign
    e. End Date
        i. The day you project to exhaust your outreach
    f. Optional Fields
        i. Costs
        ii. Expected Revenue
    g. Click 'Save'



4. Upload the Campaign Brief to the Attachments section of the Campaign (Note: This step is subject to update depending on the Box.com implementation.)

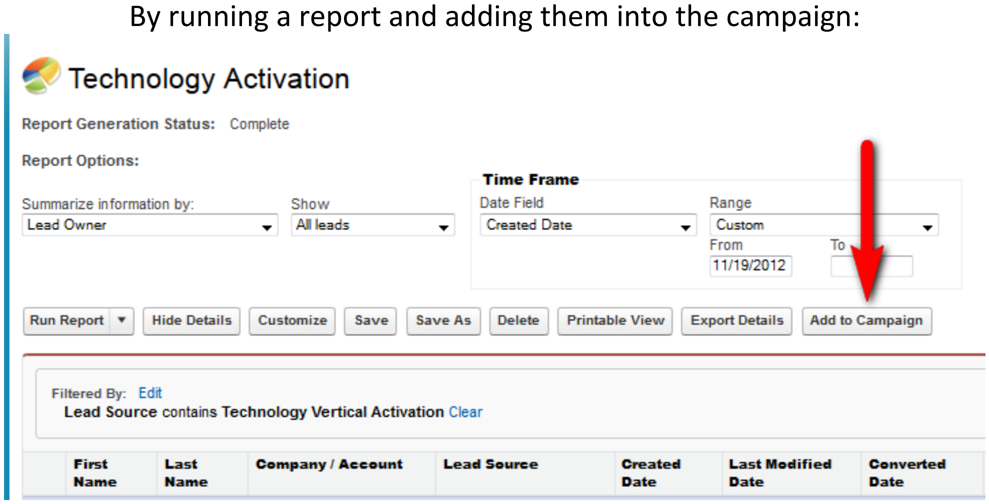


5. Add Contacts and/or Leads to the Campaign
   a. In bulk by clicking manage members on the campaign page:

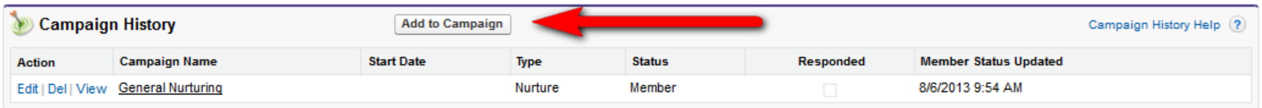


Or

By running a report and adding them into the campaign:



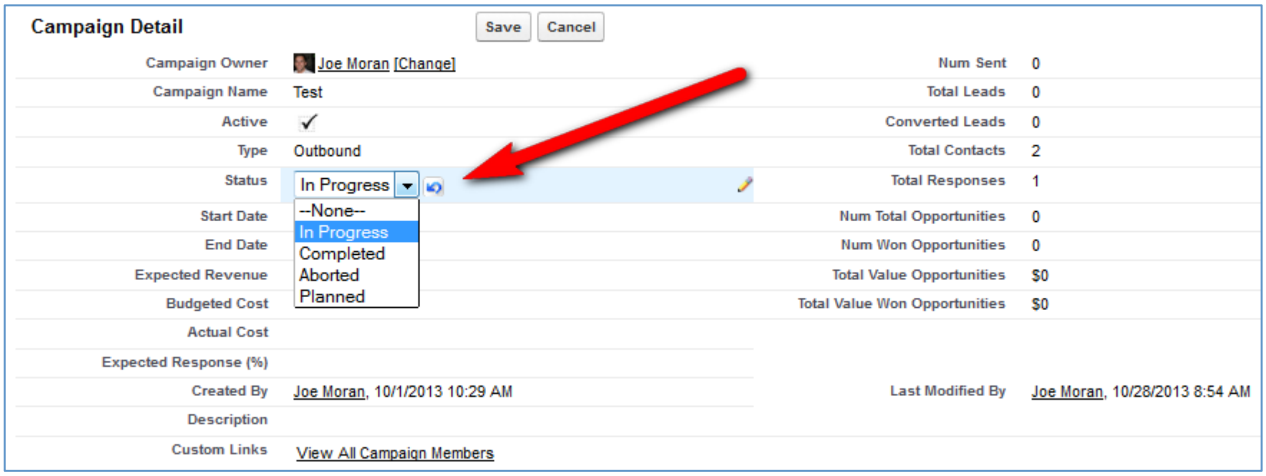
b. On an individual basis by clicking Add to Campaign on the contact/lead records



c. In either case, you will need to choose a status for the contact/lead
   i. For our initial roll out of outbound campaigns, this is not important.
   ii. Use the default status, in most cases it will be Sent.
   iii. If you would like to experiment with customizing these, click the

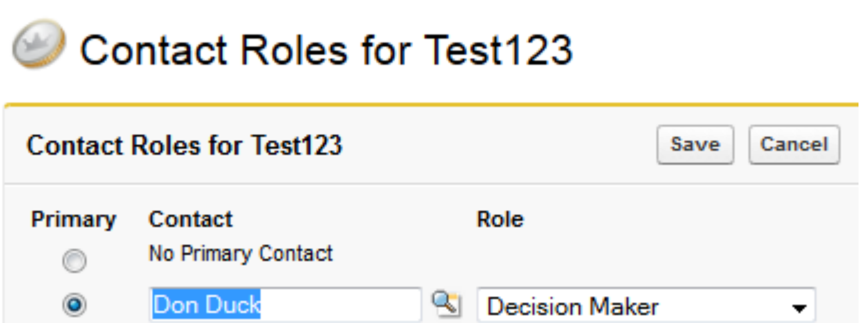
Launch the Campaign

1. Change the Status of the Campaign to In Progress



2. Begin your outreach!

3. Use Contact Roles on Opportunities to relate Campaign Influence to the Campaign
    a. Campaign Influence is automatically associated up to 180 days after a contact is added to the campaign. (Note: This will be subject to change.)
    b. Influential campaigns are added to opportunities when a campaign is related to a contact that is assigned a contact role on an opportunity prior to the close date of the opportunity.



Track the Results!

As opportunities are created (and contact roles are used), you will begin to see opportunities associated with the campaign.