Optimizing Email Prospecting

A Best Practices Checklist for B2B

Is your email prospecting getting smarter?

Soon after Ray Tomlinson sent (to himself) the first-ever email back in 1971, some sales or marketing type was no doubt imagining the prospecting potential of this alluring new technology.

The first spam email was actually sent out by DEC marketer Gary Thuerk to 393 ARPAnet users in 1978, in hopes of selling a few workstations. We don't know the click-through rate on that first email, but the pure novelty of it would have helped drive engagement.

Today, it's far tougher to reach a B2B prospect's inbox, let alone get a decision-maker to open and engage with your messages.

There are more barriers and filters than ever to email prospecting. Those include defenses set up by ISPs, third-party spam filtering services, corporate email servers, and your target's own reluctance to open messages that aren't directly relevant to his or her job.

It's why old-fashioned approaches to email prospecting and marketing are becoming obsolete. Batch-and-blast mass email campaigns using outdated or poorly-segmented lists are more likely to earn you spam blacklisting than they are to deliver solid ROI.

In the just the last few years, **email marketers have seen huge drops in deliverability**, according to a 2016 Deliverability Benchmark Report by Return Path – **down 14%** in just two years in the U.S. alone, much of it due to spam blocking. And click-through rates have also declined.

The best path to email prospecting success?

What's the solution? There **are** ways to exploit the unique effectiveness of email prospecting, even as you're faced with new obstacles.

You need to be sure you're following up-to-date **best practices** in your email prospecting, and making sure your enterprise's **email services provider** is at the forefront of the new technologies that are helping intelligent email prospecting avoid the hurdles to reaching and engaging your best targets.

The **Best Practices Checklist** you'll see in the next few pages lays out the keys to having a smarter, more effective enterprise email prospecting effort. Is *yours* up to the challenges of maximizing email prospecting ROI? Use this checklist to find out!

Email Prospecting Best Practices Checklist

I. Internal Checklist

Here are the key questions to ask yourself so you'll be able to optimize your internal email prospecting planning and execution:

	YES	NO
Are your sales and marketing teams aligned about your target audience? Marketing and sales need to be agreed on who you're targeting.	☐	☐
Do you conduct interviews and anecdotal data-gathering with sales reps, customer service reps, existing customers and prospects?	☐	☐
Are you gathering demographic, psychographic and firmographic research about your targets and accounts? This can be done by your marketing team.	☐	☐
Are you mapping the purchase decision path at targeted accounts with your sales team? Determine how many decision-makers and stakeholders need to be engaged at an account, and how and when they figure in the process or buying committee.	☐	☐
Are you developing detailed buyer/decision-maker personas? They should incorporate profiling data from multiple sources, not just purchased "leads lists" or LinkedIn?	☐	☐

What about your messaging, content and delivery?

	YES	NO
Are you ensuring message alignment? Make sure your messaging clearly understands your prospect's pain points and business context?	☐	☐
Have you built persona-based email templates? You should have templates that specifically position your value proposition and content offerings so they're individually relevant for each targeted decision-maker, based on their role.	☐	☐
Do you have content ready if/when they respond to your prospecting? Be sure you have enough white papers, data sheets and other content available, and that they're high quality. A recent Seismic/CSO Insights study found **only 48.6%** of execs said the *quantity* of content provided to salespeople met or exceeded expectations, and **just 43.9%** felt the *quality* of the content provided met or exceeded expectations.	☐	☐
Do you have delivery alignment? Your email program must integrate in timing and focus with advertising campaigns, events, P.R. and digital marketing. It's imperative, because B2B prospects will recognize if your email messages don't jibe with what they see at other touchpoints.	☐	☐

	YES	NO
Are you fully-leveraging data? You may already have a trove of useful data on hand about prospects, ready for gathering and analysis to extract value.	☐	☐
Is there useful data elsewhere within the enterprise? Beyond marketing and sales, other departments or initiatives (such as customer service) may have amassed user and prospect lists or profiling data valuable for building detailed targeting profiles.	☐	☐
Are you extracting nuggets from the existing data?	☐	☐
User-submitted data such as job titles, company names and whatever else they've voluntarily provided.	☐	☐
Download and gated content history reveals their areas of interest.	☐	☐
Email open/clickthrough behaviors; if they've opened an email more than once, they may be more interested and receptive; links they've followed also provide valuable insights.	☐	☐
Email sharing on the part of recipients indicates endorsement of what you've got to say…and potentially sell.	☐	☐
Are you integrating third-party data? Job titles off a list may not be enough to identify the right person to target, since A) those titles may not mean the same thing at different companies, or B) they're not part of the buying process. Pulling data from other sources, such as the social graph, or using a third party capable of those analytics can raise your match rates and batting average.	☐	☐

	YES	NO
Are you personalizing your emails? In "personalization", it's important to do more than just putting a recipient's name in the subject line. B2B buyers and decision-makers expect relevance from your query, and won't hesitate to condemn you to the spam folder if they don't get it.	☐	☐
Have you built persona-based email templates? You should develop a range of templates that specifically position your value proposition and content offerings for each targeted decision-maker, based on their role.	☐	☐
Are you making sure your templates don't look like templates? Be careful to *not* have templated emails give away that fact. Allow for as many personalization fields as possible, and for account-specific messaging demonstrating you know their company and segment.	☐	☐

	YES	NO
Are you safeguarding your domain and sender reputation? The biggest reason domains are blacklisted? Email marketing that's been tagged as spam. So it's vital to take steps to ensure deliverability.	☐	☐
Have you checked if your domain is verified? Use one of these (or other) tools for testing it: → **Kitterman** checks if your Sender Policy Framework (SPF) settings are in order. → **Mxtoolbox.com** helps uncover any domain and server problems. → **ISnotSPAM** tells you how "spammy" your email may be, and reports the details.	☐	☐
Have you created a separate domain for sending cold email? Even if your domain's reputation is excellent, there's no reason to endanger it. Especially since, if you're blacklisted, emails to co-workers, existing customers and others will be flagged as spam, too, causing dire problems across the enterprise.	☐	☐

II. Email Prospecting Vendor Evaluation Checklist

If you're searching for a specialized external provider to help with email prospecting, start with these guidelines for making sure they're a perfect complement to your marketing and sales efforts.

	YES	NO
Are they truly specialists in advanced email prospecting? Some vendors may claim it, but it's actually just one feature or service among many others, and doesn't supply state-of-the-art capabilities.	☐	☐
Do they combine precise targeting with great deliverability? You may choose to use separate providers, but some email prospecting platforms are able to identify, validate and profile quality leads, which enables them to deliver messages more likely to reach the inbox.	☐	☐
Do they leverage artificial intelligence? Leading-edge providers are using AI as a means for data aggregation, leads analysis, optimized sending, even for carrying on automated dialogues with prospects to qualify them for your sales team.	☐	☐

	YES	NO
Have you checked their reputation and track record? A few discovery techniques you can use are listed below.	☐	☐
Meeting or calling their deliverability manager, or the equivalent person responsible for assuring deliverability, and grill them about how they've solved issues and performed for past customers, and get customer referrals.	☐	☐
Soliciting professional word-of-mouth from trusted colleagues.	☐	☐
Reviewing testimonials, not only on a vendor's website or in selling documents, but gathered firsthand by contacting their customers.	☐	☐
Talking with consultants and agencies that know the landscape of email marketing to get their input about a prospective vendor.	☐	☐
Do they employ a robust SMTP/MTA sending platform? If so, it can significantly improve delivery rates to big mailbox providers like Yahoo, Gmail, Hotmail and others.	☐	☐
Do they offer a set of deep analytical tools to give their customers insights into delivery?	☐	☐
Do they integrate well with your existing marketing stack, or with other third-party platforms and providers?	☐	☐
Do they feature a team of experts focused on monitoring deliverability and providing customer support?	☐	☐
Are they Cloud-based? If so, scalability and ease-of-adoption should be baked into their offering.	☐	☐

	YES	NO
Is it easy to use their other tools? Those may include…	☐	☐
A template creation system for creating layouts for your emails	☐	☐
A content editor for editing the actual content of your emails	☐	☐
List management for uploading new subscribers, changing subscriber attributes, unsubscribing them and other tasks	☐	☐
List signup forms for placement on you website so people can subscribe to your mailing lists	☐	☐
Reporting tools for keeping track of how your email campaigns are performing	☐	☐

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Optimizing Email Prospecting

www.vendisys.com

About Vendisys

Our name says it all. A combination of vend (from vendere, Latin for sell) and sys (from systema, complex parts working in harmony), Vendisys is dedicated to delivering innovative sales systems that help you meet or beat your goals by opening the right doors, so you can bring in more deals and close them faster, all with zero cold calling and zero telemarketing.

Our artificial intelligence-powered email prospecting system, Converna®, navigates into your target accounts, initiates conversations and follows up on referrals until it finds the high-level decision makers that are interested in your message. Then it engages them in conversation until they say, "let's set up a time to talk." We deliver those meeting-ready decision makers right to your inbox or CRM, filling your sales funnel with Powerful Actionable Leads (PALs®).

Vendisys' efficient, intelligent system, the result of more than 12 years of field research and testing, delivers lead conversions up to 10X higher at up to 10X the speed of SEO or trade shows. You don't pay for our time or unqualified prospects, just the high-quality leads we deliver.

Ready to meet your next customer?

"Vendisys helped us improve our time to meeting by over 200%."

Sacha Stel
Director of Sales, SoftSol Group

"Vendisys has generated over 80% of the meeting activity for my region over the past nine months."

Jeff T. Wagner
Director of Sales, Hexis Cyber Solutions

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