INSTRUCTIONS

Goals of this Deck:

1. Drive value of Groove
2. Instill best practices and provide tactical guidance around Outbound

When to Use this Deck:

1. Check-ins / Success Plans / EBRs
2. You have an understanding of customer's Outbound metrics + goals

Suggested Audience:

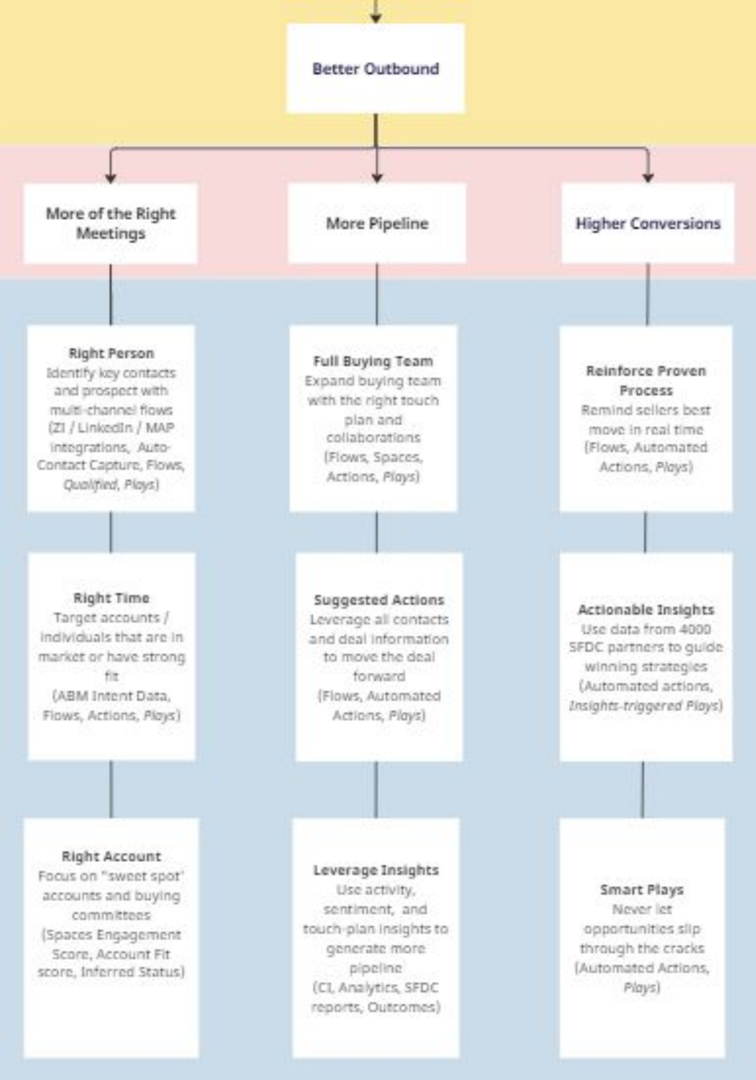
- Persona: Front-Line Manager persona, Champions

Reminder: Build and tailor this deck to your customer's goals. Make a copy of the deck, remove slides that aren't relevant, and make it your own.

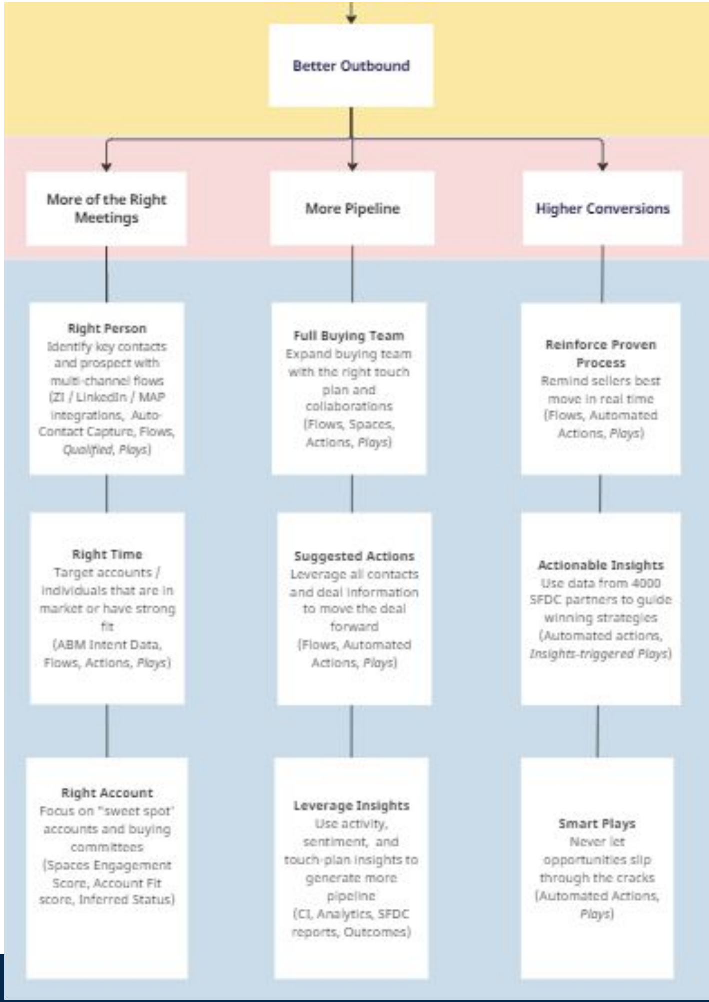
Additional Resources:

- CRO Tree of Life
- RevShoppe X Groove Outbound Best Practice Webinar
- Outbound Demo script
- Outbound Demo recording

Questions? Reach out to Logan or Jen L. on Slack!



CRO:
Grow and Expand Markets and Accounts



Success Monitoring and Outcomes

Messaging Performance

	Meetings	Open Rate	Click Rate	Reply Rate	Bounce Rate	Opt Out Rate
Today	X	X%	X%	X%	X%	X%
Avg Baseline	--	X%	X%	X%	X%	X%

Elevate your sales motion

Outbound Best Practices

Salesforce State of Sales – 5th Edition

Outbound Trends

10

Channels- the average amount through which organizations connect with buyers.

28%

of a seller's' time is spent on selling, while the remaining 72% is dedicated to administration and manual tasks.

87%

of business buyers expect sales reps to act as trusted advisors.

Source: Salesforce State of Sales – 5th Edition

Omnicell®

"We wanted something that could be easily understood and adapted into our existing workflows and processes."

Stephen Colella
Salesforce Platform Manager
Omnicell

Improved Outbound Productivity

Background

Omnicell, a large public health tech company, needed to modernize its sales force to improve productivity and visibility. Omnicell relies on hundreds of field sales reps to sell its solutions to healthcare systems and pharmacies worldwide.

Challenge

Omnicell needed to improve the efficiency and visibility of its field sellers but struggled with low Salesforce adoption. The effort required to input sales activities into Salesforce manually was more than most on-the-go reps were willing to do. Without Salesforce adoption, sales leaders didn't have the visibility they needed to identify and standardize on successful sales practices.

Goal

- Omnicell wanted a platform that could be easily understood and adapted into their existing workflows and processes.
- Omnicell wanted to improve visibility to identify and standardize on successful sales practices.
- Omnicell wanted to improve their customer communications and relationships.

Solution

- Groove Flows helps Omnicell scale outbound and connect with customers in a more relevant and personal way. Their **prospect re-engagement campaigns with Groove Flows** have garnered an impressive response rate from prospects who had never engaged with prior communications.
- Omnicell reps logged **85,000 activities in one quarter with Groove**. Not only were sales activities, communications, and meetings logged, but there was also a major increase in contacts created with Groove's automatic contact capture capability.

Results

- Automated activity capture has boosted rep productivity by 50%
- Tracked activities went from 500 to 85,000 per quarter
- Improved visibility into sales activities has enabled Omnicell's reps to assess the effectiveness of its sales reps and continually optimize processes and sales plays
- Increased meetings booked with Groove Scheduler

Every Sales Organization Can Benefit From a More Efficient Outbound Process

With **Groove**, you can improve target account coverage and increase conversion rates by focusing on the following **key areas** to effectively scale and manage your outbound sales process.

1. **Targeting**
   Who are the people we're adding? How many contacts should we be working to meet our goals?
2. **Messaging**
   3 ways we recommend building out an effective messaging strategy
3. **Actioning**
   Create a consistent process to optimize your strategy and enable your teams
4. **Reporting**
   Understand what's working – and what's not so you can identify gaps and optimize over time
5. **Governance**
   Create a consistent process to optimize your strategy and enable your teams

Targeting

Targeting

Save time and resources by focusing on potential customers who are most likely to be interested.

By reaching the right audience, sales teams have a better chance of converting leads into satisfied customers.

Best Practices

Adding the Right People

Who are we adding? Targeting, ICP

How Many People Should I Add to a Flow?

Calculator

Streamlined Prospecting Workflow

Using Omnibar for efficiency

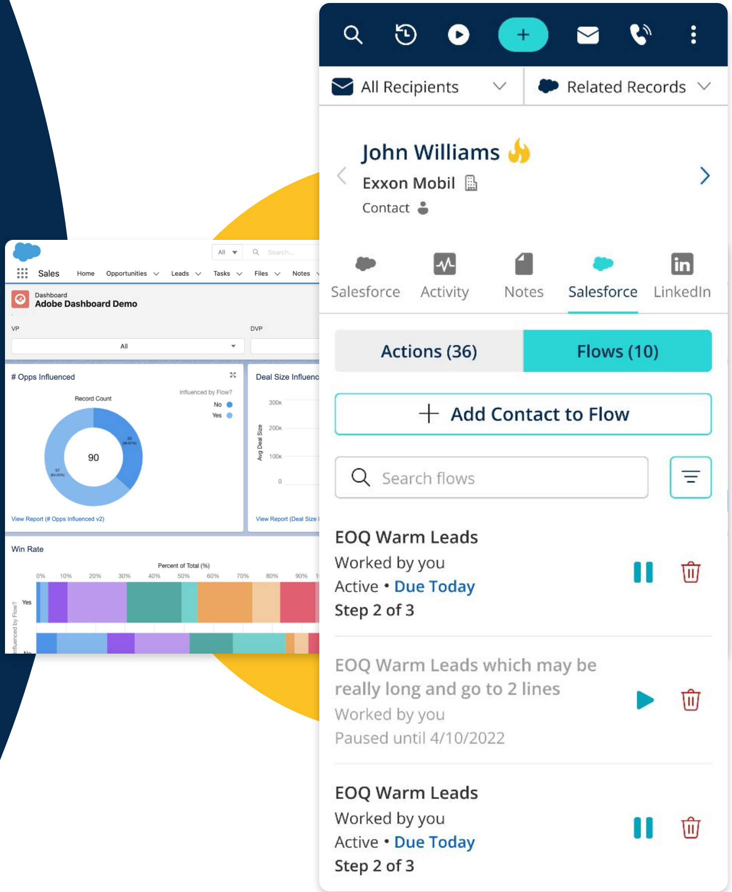
Targeting

Adding the Right People

The types of people and accounts you add to your Flows has a huge impact on your performance. Targeting the right people is key to a successful outbound strategy.

Best Practices:

- Identify the characteristics of your ideal customer, including company size, industry, job titles, pain points, and challenges (this is your ICP)
- Use your ICP to create a list of target accounts to prioritize for outbound sales efforts
- Research your target accounts to understand their needs, challenges, and pain points
- Look for commonalities among your most successful customers, such as industry or company size



groove

Targeting

How Many People Should I Add to a Flow?

Understanding how many people should be added to your Flows can help you accurately forecast pipeline, assess team performance, and hit your numbers.

We recommend working backwards from your revenue goal using our calculator.

Download Calculator

	Inputs	
A	Goal Time Period	Quarterly
B	# of Reps	XXX
C	Team's Revenue Goal	$XXX,XXX
D	Average ACV	$XXX,XXX
E	Inbound ACV	$XXX,XXX
F	Number of Outbound Closed Won Opportunities to Achieve Goal	XXX
G	Close Rate of rep Created Opps	XX%
H	Qualified Lead to Opportunity Conversion	XX%
I	Inbound Lead Conversion	XX%
J	Outbound Conversion - Initial Touch to Meeting Booked Rate	XX%

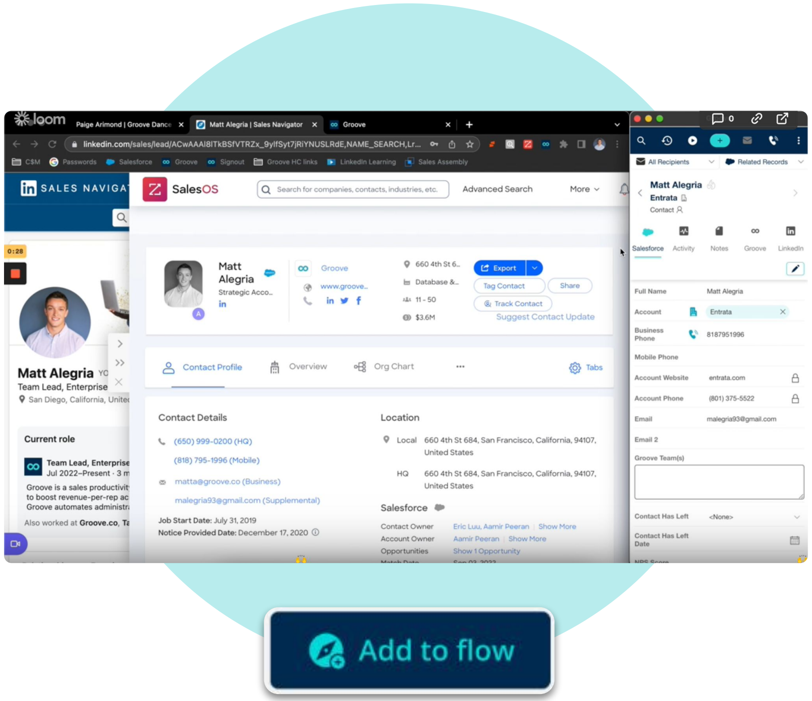
	Outputs	
K	Number of Outbound Qualified Opportunities	F * G
L	Outbound Meeting Booked	K * H
M	People Touched Needed Per Quarter	L * J
N	Weekly People Added	M / (12)
O	Weekly People Started per Rep	N / B

Targeting Recommendation

Omnibar Prospecting Workflow

Try this powerful workflow. Use the Omnibar to find new people faster, add them to Salesforce, and enrich their records with the latest info —all from one screen.

1. Pop out the Omnibar while prospecting in Linkedin
2. Leverage Zoominfo to grab contact details in parallel
3. Reference Omnibar to see Salesforce insights and update relevant standard and custom fields
4. Add to a Groove Flow via Omnibar in a single click



Messaging and Content Strategy

Messaging and Content Strategy

A tight messaging and content strategy helps teams communicate effectively with potential customers and make their messages consistent.

By customizing their messages and testing different approaches, sales teams can increase their chances of success.

Best Practices

Develop Groove Flows

Touches and channels

Improve Time to Value with Master Flows

Messaging control and standardization

Building Your Own Prospecting Flow

Take it and make it your own

Test Your Messaging

A/B test to find what’s most effective

Multi-Thread to Win

Capture every contact

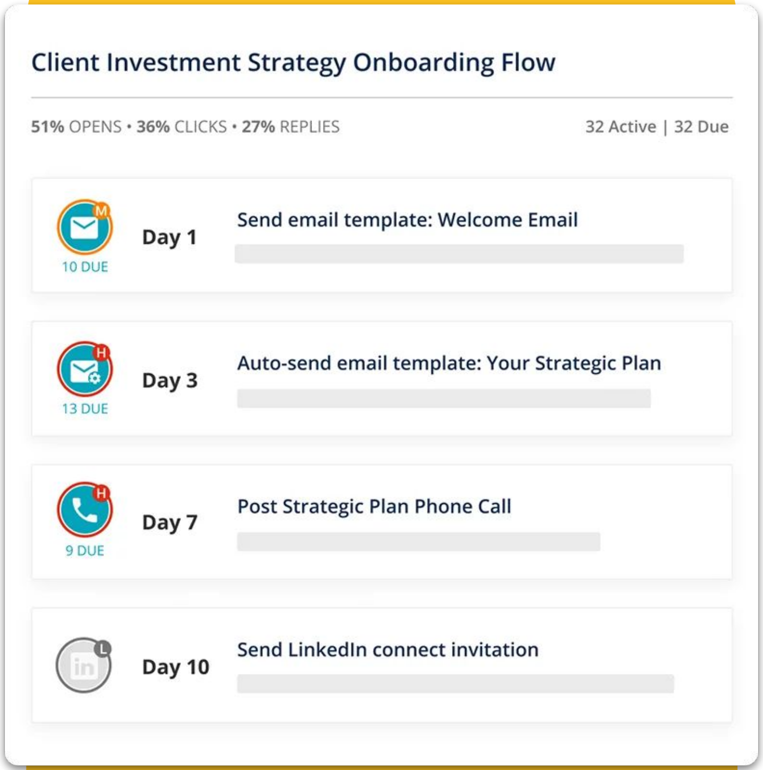
Messaging and Content Strategy

Developing Groove Flows

Provide a consistent, personalized, and effective framework for sales reps to engage with prospects and move them closer to a buying decision.

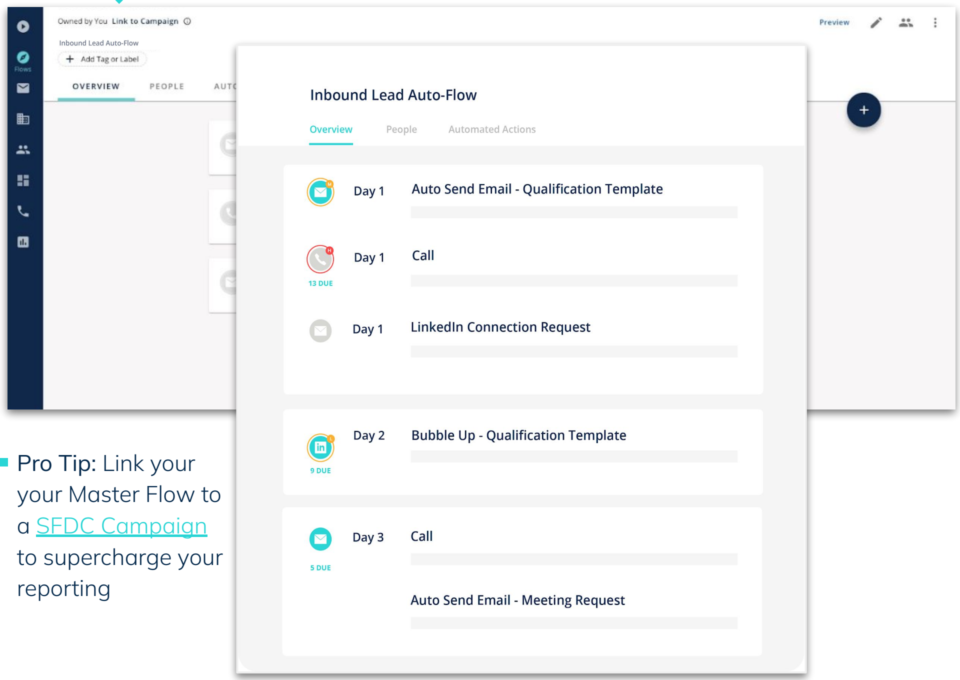
Best Practices

- More touches! Studies show that Sales cadences with **11 or more touches had a 10% higher conversion rate** compared to cadences with fewer than 6 touches *(Bridge Group)*
- Coordinate touches in groups for increased engagement
  - *ex. Email, call, and Linkedin InMail on day 1 is known as a "Triple Touch" and greatly increases engagement*
- Use every channel. Mix calls, emails, Linkedin connections and InMails, and on-site visits (if applicable) for the best results



Improve Time to Value with Master Flows

Master Flows help you create consistent messaging with a personal touch, while controlling the content, structure, and execution of your Flows.



Pro Tip: Link your your Master Flow to a SFDC Campaign to supercharge your reporting

Best Practices:

- Create a **Master Flow library** that reps can leverage and add their own contacts to without having to draft their own individual communications from scratch
- Give reps the **freedom to personalize** components of each message and optimize over time
- Focus on **Flow optimization** by A/B testing to compare the top performing steps in your Flow
- For Outbound, we recommend a high-touch strategy over a longer period of time:
  - **Flow mix:** 40% email, 40% calls/SMS, and 20% LinkedIn
  - **Touches:** 10 to 25
  - **Duration:** 2 to 4 weeks

Messaging and Content Recommendation

Building Your Own Prospecting Flow

Flow Recommendations	
Number of Touches	10 to 22
Duration of Flow (wks)	2 to 4

Suggested Audience

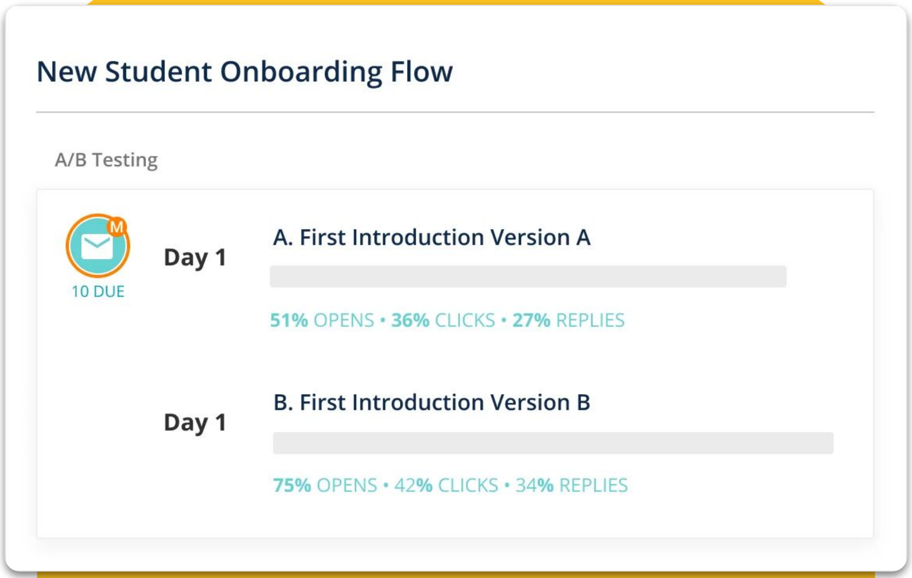
Target prospects not currently engaged with your company. These contacts are not familiar with your company, product, and services and it may be difficult to catch their attention.

Step	Action Type	Day Due for Action
1	Manual Email Send	Day 1
2	LinkedIn Connection Request	
3	Phone Call	Day 3
4	Automated Email - Include in thread	Day 4
5	Voicemail Phone Call	Day 6
6	Phone Call	Day 7
7	Automated Email - Include in thread	Day 9
8	Linkedin Inmail	Day 11
9	Phone Call	Day 13
10	Automated Email	Day 15
11	Automated Email - Include in thread	Day 17
12	Automated Email - Include in thread	Day 18
13	Phone Call	Day 20
14	Voicemail Phone Call	Day 22
15	Automated Breakup Email	Day 24

Messaging and Content Strategy

A/B Test Your Messaging

Make data-driven decisions about which marketing or sales tactics are most effective in achieving your goals



Best Practices:

- Use Flow variations to test different messaging by (sub)industry and audience
  - *Ex. Flow 1 = Industry 1, Flow 2 = Industry 2*
- A/B test Templates within Flows to split messaging between one audience
- Compare Open, Click, and Reply rates for A/B Tests in Groove Outcomes and Analytics

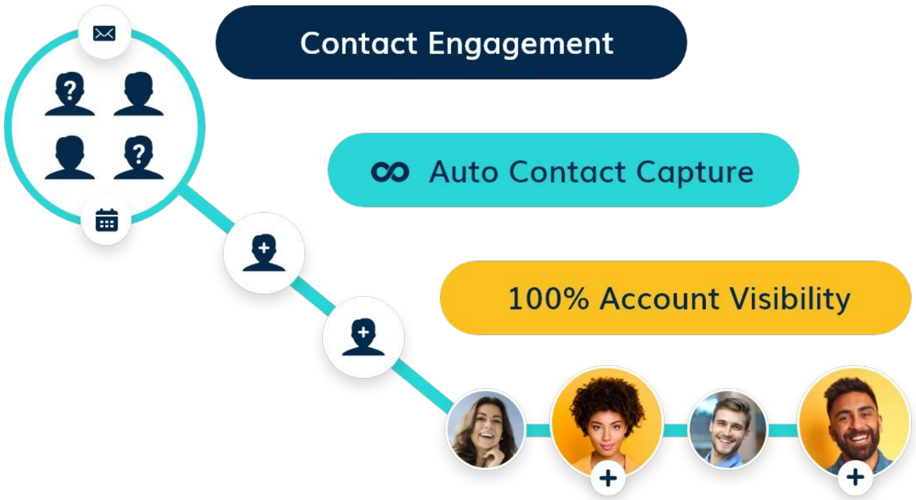
"For every Flow, we're using Groove to A/B test subject lines and CTAs to determine what's getting traction with certain demographics."

GREG LARSEN, VP OF REVENUE OPERATIONS AT LINGOTEK

Messaging and Content Strategy

Multi-Thread to Win

Engage with multiple stakeholders within the target account to build a broader support network and increase your win rates.



Best Practices:

- Understand who the decision-makers and influencers are within the target organization
- Leverage your existing relationships to identify and engage with multiple stakeholders
- Develop a coordinated outbound plan that involves multiple team members and touches on multiple channels
- Leverage Groove's Auto-Contact Capture functionality to add contacts from calendar events and cc'd on emails to Salesforce automatically for multi-threading
- *Ex. Multi-Threading Strategy: When working an opportunity, capture new contacts with ACC and Auto-Import them into a "New Stakeholder Flow" with an email in Step 1 (automatic or manual) introducing yourself and offering to schedule a demo.*

Actioning your Strategy

Actioning your Strategy

Reach more potential customers faster and reduce the burden on sellers by automating repetitive tasks and allowing them to focus on building relationships.

By capturing clean data and automating actions, sales teams can make better decisions, gather deeper insights, and improve their overall performance.

Best Practices

Increasing Touchpoints through Automation

Eliminate seller burden

Capture Clean Data

Automatic updates and deeper insights

Baseline Automated Actions

Start automating

Actioning

Easing Seller Burden

Automation helps teams supercharge their outbound workflows by reducing administrative burden and manual tasks.

With simple automations set-up, outbound teams can streamline their sales processes and execute with efficiency.

61% of businesses leveraging automation reported exceeding revenue targets in 2020

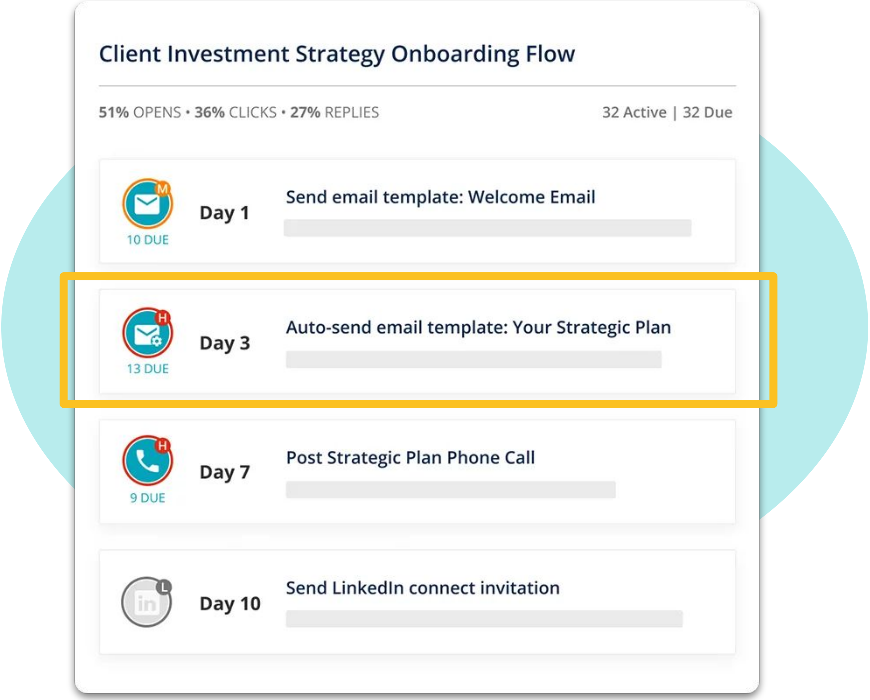
Hubspot

Actioning

Increase Flow Touchpoints

Build Automations into Flows to increase touches without increasing seller workload.

- Automate bubble-up emails if there is no reply
  - Set up an automated action to automatically remove the contact from a Flow “On Reply”
- Automatically create a Salesforce task for a contact owner to follow up after an engagement

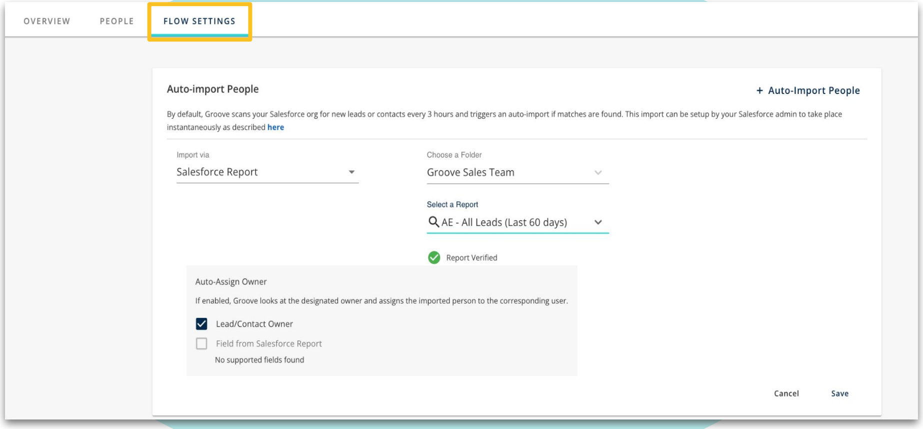


Actioning

Streamline Import Processes

Remove manual steps for adding people to Flows and queue reps to engage with the right people by setting up Auto-import

1. Create a SFDC report with specific criteria
   - *Example: "Newly created leads today"*
   - *Remember to include the record owner in the report for auto-assignment*
2. In **Flow Settings** set up Auto-import via your Salesforce report into a Master Flow
3. Define how you want to auto-assign leads per rep within your flow
   - *Lead/contact owner*
   - *Custom field*



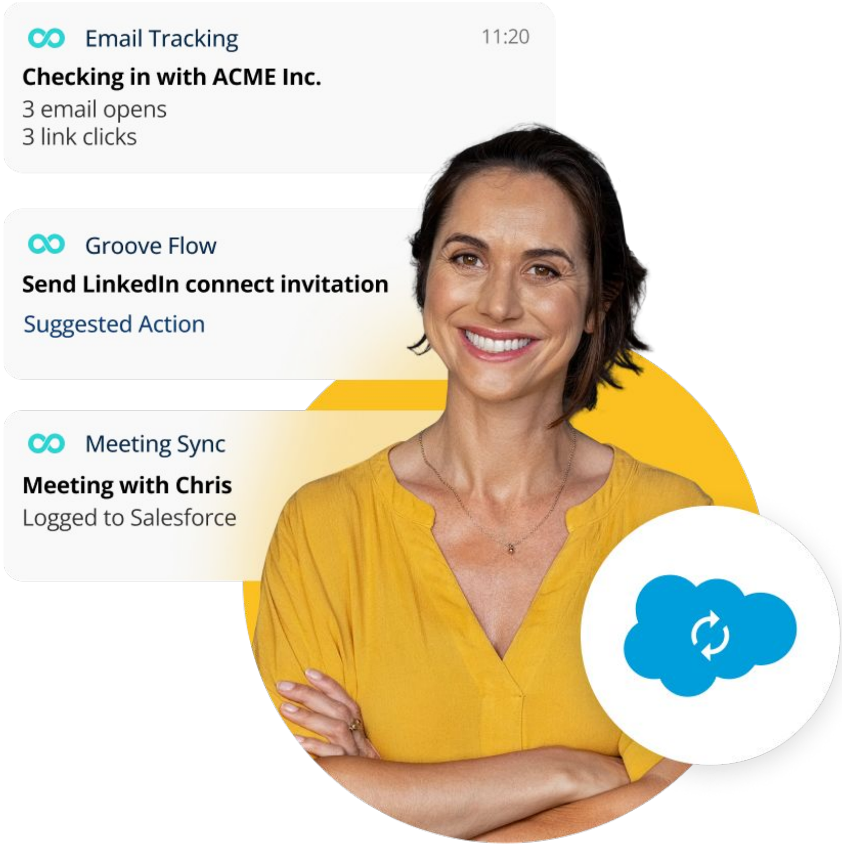
Pro Tip: To ensure a successful import, make sure to share the flow before attaching the report

Actioning

Ensure Flow Hygiene

Move people between Flows and update Salesforce fields automatically based on events and criteria such as email reply or updated status.

- Automatically refresh and update records/people at the end of a Flow
  - *Automated Action: On “Complete”, add people to a Nurture Flow, built to keep contact with the person over a longer period of time*
- Update Salesforce on Engagement
  - *Change a person’s status to “Engaged” and remove them from the Flow if they open an email*



Automated Actions Flow Example

Prospects

A B C D

Step Number	Action Type	Day Due for Action
-	★ Automated Action: On Import → Update Salesforce Field → Lead Status = Contacted	
1	Manual Email Send	1
2	Voicemail Phone Call	1
3	LinkedIn Connection Request	3
4	Automated Email - Include in thread	4
5	Phone Call	6
6	Automated Email - Include in thread	7
-	Customer A Replies to your Email	
-	★ Automated Action: On Reply → Remove from Flow	
9	Linkedin In-mail	13
10	Phone Call	15
11	Voicemail Phone Call	17
-	Customer B Books Meeting	
-	★ Automated Action: On Meeting Booked → Remove Everyone in this Account from the Flow	
15	Automated Email - Include in thread	24
16	Automated Email - Include in thread	
17	Phone Call	
18	Breakup Email	
-	★ Automated Action: On Complete → Update Salesforce Field → Lead Status = Nurture	
-	★ Automated Action: On Complete → Add Them to a Flow → Flow Name = Nurture Campaign	

Measuring Success

Measuring Outbound Sales Success

Measuring outbound sales success is critical to optimizing your outbound sales strategy. Key performance indicators (KPIs) to track may include meeting booked, opportunities created, response rates, conversion rates, and sales cycle length.

Sales teams should regularly review their metrics and adjust their outbound sales strategies based on their findings.

Best Practices

Evaluate Messaging Outcomes

Groove Outcomes

Track ROI of Flow messaging

Connect Flows to Opportunities

Improve Visibility into Sales Activities

Events and Opps updates

Optimize & Iterate Your Strategy

Set-up a process for improving over time

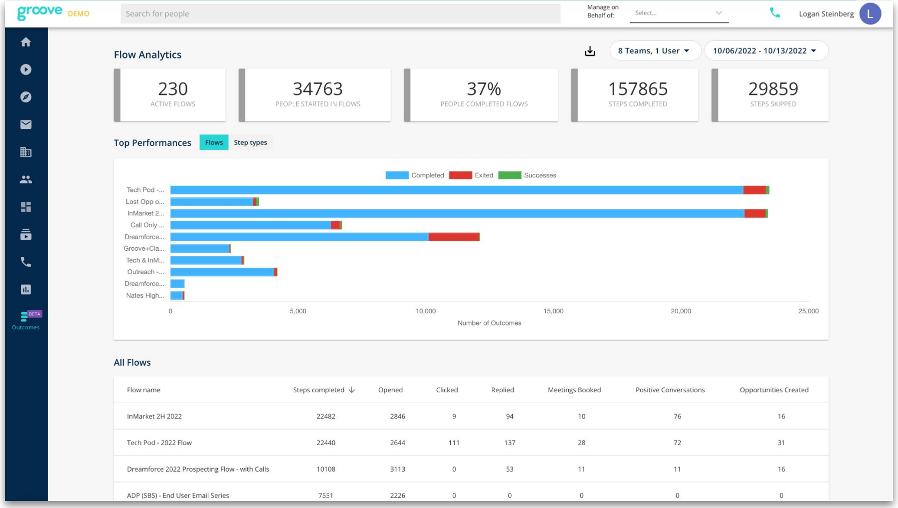
Measuring Success

Evaluate Messaging Outcomes

Leverage **Groove Outcomes** to understand which messages, steps, and users are generating the most engagement, positive conversations, and opportunities — so you can fill the gaps.

Learn more

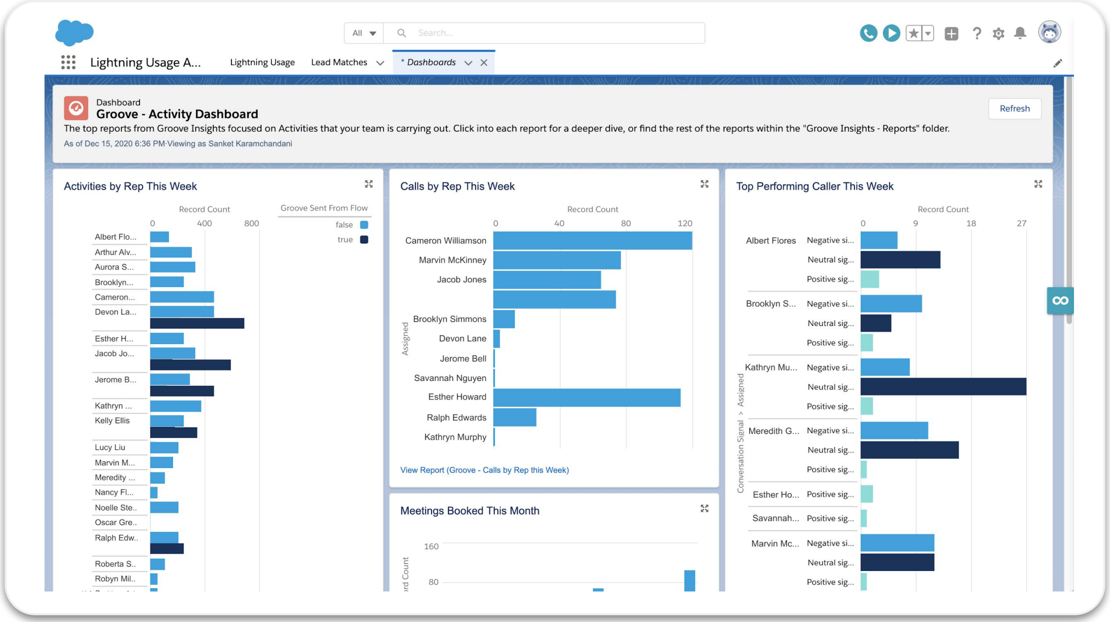
- Identify High Performing Steps
- Discover Best Step Types
- Uncover Top Flows
- Visualize Contact Progression
- Analyze Account Engagement
- Understand Flow Usage



Measuring Success

Groove Insights

Unlock dozens of key Salesforce reports, dashboards, and fields with a single click



Groove Insights Components

Reports	33
Dashboards	3
Layouts	3
Folders	2
Field Sets	1
Activity Fields	9
Contact Fields	21
Lead Fields	21

Measuring Success

Improve Visibility into Sales Activities

Configure automations that give you more visibility into deals without any additional seller burden.

Recommended Automations

Enrich contacts with Engagement data

Update Campaign Member Status on Email Reply

Enrich events with associated messaging data

Update Event with Flow Data

Enrich Opportunities with associated messaging data

Update Opportunity with Flow Data

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Improving Analytics with Automation

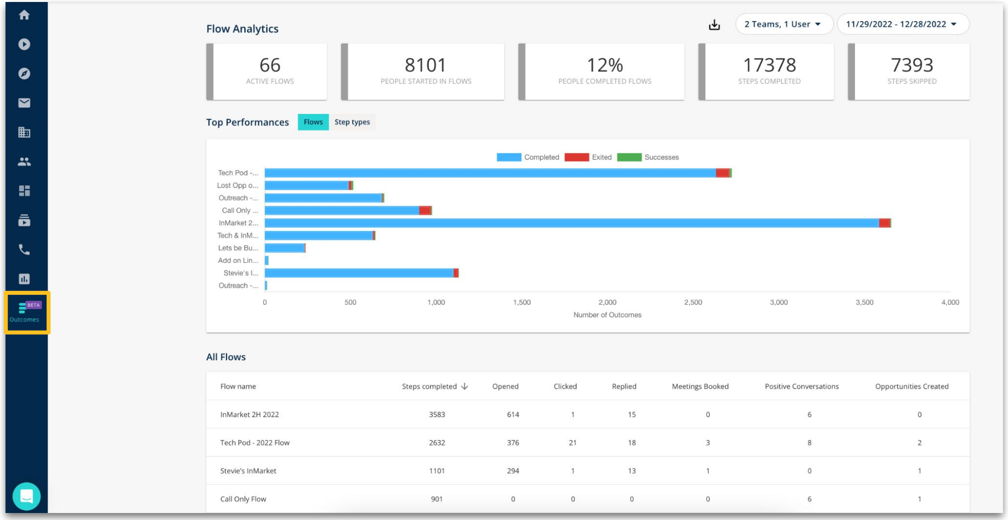
Powerful Automation Workflows can super-charge your team's ability to report on Groove activities, the success of different Groove templates and Flows, and their impact on revenue.

Get the Guide

Optimize & Iterate Your Strategy

Evaluate performance using Groove **Outcomes**, **Analytics**, or Insights

1. Make sure you're adding enough people
   a. Does the # map to your goals?
2. Review top performing **Templates**
   a. Review templates with highest engagement metrics (open, click, and reply rates)
3. Review top performing **Step Types**
   a. Analyze which step types have the most conversions: Call vs Email vs LinkedIn
4. Review top performing **Step Numbers**
   a. How many touches before a conversion typically happens



Pro Tip: Compare A/B tests to see performance variations in content

Governance

Keep the Momentum Going

Creating a clear structure around governance will ensure your new strategy is successful long-term

- Form a cross functional tiger-team with internal stakeholders (Sales, Marketing, Rev Ops) and hold a weekly "Leads War Room" to review:
    - Content
    - Lead flow
    - Gaps
- Create a process for requesting new content and flow creation access
- Build a repository of Master Flows organized by using Groove Labels
- Hold messaging workshops to train your qualification team on your new workflow and strategy
- Understand Deliverability Issues in Salesforce
- Add controls to ensure that ONLY the right people can modify Flow and Template content

Do These 5 Things

Summary of Deck: Do these things now!

1

*Add the **Right people,** and the **Right quantity***

2

***Create Messaging Frameworks** and share them as Master Flows*

3

***Ease seller burden** with Automations throughout your process*

4

***Identify Key Metrics** and configure process for capturing them*

5

***Optimize Flows and Templates** based on your key metrics*

1. Add contacts and leads to appropriate Flows
2. Create new Flows/Templates and standardize high performing Flows/Template
3. Continuously analyze and optimize active Flows and update Playbook

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Questions?

Reach out to your Groove CSM

APPENDIX BELOW

What We Heard Last

1. {Reduce Seller Burden} - {customer} would like to streamline workflows and use automation to help them do more with less.

2. {Complicated Salesforce} - {customer} has a complex SFDC instance with seven different U.S. divisions that don't follow a linear sales process.

3. {Desire to increase conversions} - {customer} has a key initiative to increase inbound meeting conversions and improve win rates.

Best practices framework from Groove's high-growth technology customer base

1

Create Master Flow Playbook (2-4 initial Flows)

2

Incorporate automated actions

3

Reps personalize and test Flows/Templates

4

Analyze and drill down into performance results

5

Optimize Flows/Templates in Playbook

1. Add contacts and leads to appropriate Flows
2. Create new Flows/Templates and standardize high performing Flows/Template
3. Continuously analyze and optimize active Flows and update Playbook

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