

THE COMPLETE GUIDE



TO SUCCESSFUL SALES PROSPECTING



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PREAMBLE

GENERAL REMINDERS ABOUT SALES AND MARKETING

- Google is responsible for 94% of all organic traffic.
- Only 29% of people want to talk to a salesperson to learn more about a product, while 62% will consult a search engine.
- 75% of businesses say closing more deals is their top sales priority.
- 40% of salespeople say it's getting harder to get a response from prospects.
- Every company needs to challenge their own sales funnel: 67% of the sales cycle is completed on digital channels before contacting the company! (*Forbes, January 2023*).

WHY CHALLENGE THE SALES FUNNEL?

The customer journey is no longer linear. Prospects no longer enter only at the top of the funnel. Customer acquisition has changed: customers arrive at any stage and often skip stages or go back and forth between them.

A new paradigm and reality led us to write this new must-have guide to successful sales prospecting.

We remind you that we work in French, English and Spanish but that this guide is valid for other languages.

We work mainly for B2B companies but many of our recommendations are also valid for B2C.

We would like to point out that at the time of writing this guide (1st quarter 2023), we have had the chance to collect, consolidate and synthesize information from more than 20 years of B2B sales experience in many countries in Europe, Africa, and Asia.

We have also surrounded ourselves with North and South American experts to compare our more "European" vision and what we can confirm is that the planet is full of skills in all countries and that remaining "curious", modest, and humble and cultivating an international and multicultural network remains, in our opinion, the best way to continue to progress and improve the quality of one's sales prospecting.

Before getting to the heart of the matter, here are our 5-point observations on current trends in the ecosystem:

1. Increased competition

2. Customers are changing the way they buy a product or service.

- 70% of buyers make their purchase decision BEFORE talking to a salesperson.
- Today's customers have technology, they search for any purchase decision in seconds, but they also take the time to research (companies that educate their audience and help with research are well positioned to do better).

3. Sales teams don't generate qualified sales leads

- When was the last time you made a purchase or investment after receiving a cold sales call?
- The reality is that cold calling is becoming less and less effective and the brand perception is becoming more and more negative for those who continue to cold call prospects.
- Sales lead generation is also becoming less of a salesperson's job and more of a marketing team.

4. Buyers no longer need salespeople

Business decision makers, like all consumers, now expect to have a wealth of information about the products or services they are reviewing or considering for purchase.

A simple Google search from their smartphone after a business meeting can be the first step in exploring options that meet their needs. The question is to respond already on the web when prospects are looking for answers and resources on a particular topic related to their industry.

The need for a salesperson has become almost non-existent until it's time to "close the deal." Many buyers even view salespeople as mere price negotiators or as a mandatory step to take to get a quote or proposal. Buyers also generally prefer to deal with a consultant or expert during the sales process, who offers a consultative approach so that the buyer's needs are clearly understood (and sometimes even "challenged").

5. Marketing budgets are diluted as the number of marketing opportunities increases

Should marketers focus on specific channels and perhaps reduce experimentation?

Should marketers dilute their budgets across multiple channels to expand reach and audience engagement opportunities?

Whichever path is chosen, there are opportunities that will be missed.

It's unfair to expect constant increases in marketing budgets => companies need to focus on integrating their marketing efforts for maximum benefit (even when budgets are tight!).

We have written this guide to help you sell more, sell better, and most importantly, save time...If your product takes 4 months to sell, we would be very happy to save you 1 month if, with this guide, you can sell it in 3 months!

Sales prospecting is a crucial step for the development of your company

IT IS IMPORTANT TO CONDUCT IT CORRECTLY!

The results of commercial prospecting can sometimes turn out to be disappointing... Lack of answers to your emails, few successful exchanges by phone, exhausted and even demoralized teams. You then have the feeling that you are conducting all your actions blindly and not generating any results.

It must be said that **prospecting cannot be improvised**. And times are changing; we don't prospect the same way we did 10 years ago!

To help you get the most out of business prospecting, we have put together this guide with **the best techniques and tips to improve your approach and increase your chances of success**. You'll learn how to find prospects, create effective campaigns, cultivate long-term relationships with your customers and get real results, among other things.



**Sales prospecting is essential to sustaining your business
and increasing sales.**

So don't neglect it!

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WHAT IS SALES PROSPECTING?

Prospecting is an essential step in the development of a company. Before setting up a prospecting strategy, it is essential to understand the terms and mechanisms surrounding this process.

DEFINITION OF COMMERCIAL PROSPECTING

Prospecting is a commercial process that consists, for a company, in **identifying potential customers** (called prospects) to transform them into real customers and increase sales. It is the first step in the sales cycle and is essential to support the growth of the company and thus ensure its sustainability.

WHAT IS THE PURPOSE OF PROSPECTING?

The objective of prospecting is to obtain new customers and to develop their loyalty. To achieve this, prospecting must allow you to:

- Understand the real needs of your future customers ("N" in the "BANT" strategy).
- Increase the notoriety of your company among prospects.
- Offer an adequate product and/or service in each geographical market.
- Obtain meetings with prospects and/or partners.
- Gather key information from your customers and prospects and thus refine your commercial acquisition strategy.
- Carry out and enrich a market study.
- Carry out and/or confirm a "GO TO MARKET" strategy (SWOT analysis, competitor analysis, etc).

To find prospects, the sales team relies on prospecting techniques and tools, which are constantly evolving over time.

THE TWO MAIN TYPES OF PROSPECTING

Sales prospecting has adopted **new modes of communication**. **Inbound marketing** and **outbound marketing** are two techniques that use different tools and whose effects also differ.



We explain the evolution of these methods and the main trends of the last 20 years according to us and our experts at [Finelis](#) and [Finelis](#) [Coaching in this 50-minute video in 36 points.](#)

Inbound prospecting

This is an approach that places **content at the heart of the marketing strategy** and therefore at the heart of the sales process. Inbound sales prospecting consists of creating qualitative and targeted content, distributed on social networks, in blog posts, etc. **The content responds to a real need of the lead.**

There are many **inbound marketing communication materials**:

- a guide;
- a white paper;
- an infographic;
- a blog article;
- etc.

In an inbound approach, the salesperson contacts **a prospect who has expressed some interest in the company** via interaction on the site, content, or social networks.

Outbound prospecting

Outbound marketing is a strategy that aims **to spread a message to the consumer**. It relies on different levers allowing a large-scale distribution:

- phone prospecting;
- sending emails;
- paid advertising;
- trade shows and commercials;
- etc.

Unlike inbound marketing, which aims to attract prospects, **outbound marketing aims to go out and find them**, or "hunt" them as we used to say. Today, "hunter" sales representatives are called "SDR" (Sales Development Representative). They used to be called "NEW BUSINESS" sales representatives.

WHAT ARE THE STAGES OF SALES PROSPECTING?

Whatever the field of activity, finding new leads, marketing your products and services, and building customer loyalty are essential to **the sustainability** and **expansion** of your company. Let's see what the different steps of commercial prospecting are.

CREATING AN EFFECTIVE PROSPECTING PLAN

At first glance, sales prospecting may seem very simple. However, even with a highly skilled sales team, **prospecting can be costly in terms of time and money** if the people you contact are all unqualified prospects that do not fit your company's target.

This is where **the development of a sales prospecting plan** comes in. The prospecting plan allows you to keep track of all the steps you take to find prospects. By using it, you will be able **to measure and evaluate the success of your actions by consulting the key indicators** that you have defined in advance.

This action plan seeks to understand the "why" and "how" of prospecting to find the best opportunities. For a prospecting plan to be effective, your company must have a well-informed and regularly updated **prospect file**.



To create a prospecting plan, you will have **to know** your target well, define **your objectives**, **set up actions to qualify prospects**. Moreover, you will have **to choose one or several channels according to your budget**. Finally, it will be essential **to set up a follow-up** and thus relevant **qualitative** and **quantitative indicators**.

You will find here more details on "[How to implement an effective prospecting plan?](#)".

When a prospecting plan is methodically elaborated, it **allows to define the targeting of prospects** and **to optimize the response rate**. It is not uncommon for clients to underestimate the time it takes to draw up a plan and thus leave with a list of prospects that is far too small.

HOW TO ORGANIZE YOUR PROSPECTING?

Prospecting is often considered as a difficult and thankless task. But it is important to know that for your prospecting to be as effective as possible, there are steps to follow.

Very often, we prefer to take care of our existing customers rather than looking for new ones. However, sales prospecting is a bit like running. At the beginning, you have a lot of aches and pains, you feel like you have reached the end of your life. But with time and training, you progress, you gain confidence in yourself. And you even end up enjoying it!

Here is how to organize your prospecting so that it becomes a real success.

- **Establish your prospecting process**

Canvassing clients cannot be improvised. To optimize your prospecting, you will set up a clear and detailed process. Thus, you will know precisely what you have to do, and you will save time.

- **Evaluate the time needed for your commercial prospection**

Your prospecting must be thought out strategically. Once you have established your process, you will evaluate the time needed for each action. This step will prevent you from getting discouraged and giving up.

- **Plan prospecting into your schedule**

You have established a process and you now know how much time you should devote to prospecting. All you must do now is block out time in your schedule.

For your canvassing to bear fruit, regularity is essential! Think about tomorrow and, even if you are working on a great mission today, do not devote 100% of your time to it. Set up a prospecting routine by including time slots for canvassing in your schedule, without deviating from it.

To go further, read the article "[Why set up a prospecting schedule?](#)".



DESIGNING PROSPECT FILES

The prospect file is a tool used during your **marketing campaign**. It is essential for all **phone and written prospecting operations**, including e-mailing, postal letters, and messages on social networks.

This file can be considered as a potential customer's identity card. For it to be effective, a prospect card will contain three types of data:

1. **Personal or descriptive information** (last name, first name, age, profession, family situation... or in B2B, company name, head office, competitors...).
2. **Action information** (dates of contact, name of the salesperson who made the contact, an overview of the topics discussed during the exchange and future actions to be taken).
3. **Reaction information** (indicates the reaction or buying behavior of the customer. It can concern the quantity of products purchased, the dates of purchase, etc.).

There are several tools at your disposal to create a prospect file. Here are a few that we have identified for you and that will help you build a complete and good quality prospect file:

- **The CRM**

A contact management tool, the CRM allows you to easily collect data about your prospects. It is a very complete category of software that simplifies the management of the relationship with your prospect up to the multi-channel management of your customer relationship.

- **Software that can be connected to CRM (visibility management tools and other prospecting tools)**

Your prospect evolves through the different stages of the sale, often represented by a funnel. Having this type of software will facilitate the implementation of your strategy as well as the construction of prospect files (easy management of contacts, follow-up of your prospecting actions...).

- **The use of Excel or Word (or equivalent)**

This is the simplest and most affordable way to create prospect files. However, it is a very limited tool that leaves you very little flexibility.

Now you know how to create a prospect file that will form a solid foundation for building a relationship with your future prospect. This tool will not only allow you to assist the progress of your target but will also help you to perfect your approach.

You can also go further by reading our article "[What are the advantages of a CRM for a company?](#)".

PERSONALIZE YOUR MESSAGES

Before you start personalizing your prospecting messages, there are two key things to remember.

1. It's great to show that you've done your research up front, but the information you find must also be relevant to what your solution does. Because **personalizing to just "pitch" is not enough.**
2. This is not a perfect template so you won't find information for everyone.

Here are some tips for a successful prospecting message.

- **Remember to introduce yourself.** Your contact should have a clear idea of who they are dealing with.
- **Define a clear and precise subject.** This should be in line with your mission with the future prospect.
- **Convince the prospect.** To capture the attention of the prospect and give him confidence, you must choose and use the right words.
- **Address the right message.** You need to research your target audience to respond perfectly to their requests. Careful research will allow you to personalize your message to the maximum and will be highly appreciated by your interlocutor.
- **Give value to your interlocutor.** Do not hesitate to put forward a targeted problem and adapted solutions that will enhance your prospecting message.

- **Give priority to quality over quantity.** It is better to address a small number of prospects at first. You can start gradually if you are just beginning to prospect, but you should always think about the quality of your services and therefore of your messages.

If you follow these few tips, you should be able to develop a quality message. With a minimum of motivation and know-how, customers will naturally come to you.



MONITORING YOUR PROSPECTING CAMPAIGN

For your prospecting campaign to be successful, you must also know how **to manage the returns and follow up on your various actions**. You will have to manage, among other things, unsubscribe requests or address changes, depending on the chosen communication channel.

Only after these returns have been processed can you proceed with the follow-ups, taking care to exclude the contact information that needs to be excluded. Then, you can focus on sales opportunities and negotiation techniques to be implemented.

Finally, you will analyze the campaign by considering the expenses, revenues, and profitability.

RETAINING CUSTOMERS

The last step in business development is to retain your customers, both with newly acquired customers and with former customers.

It is important to know at this level that **the lack of contact or an inappropriate follow-up causes the departure of many customers**, as much as a poor-quality service. So even if you are confident in the quality of your products and or services, you must also **implement** ways to maintain quality contact with your customers.

This will cost you much less than finding new customers. So, think about offering them additional products or services according to their needs, and set up a chain of loyalty.

Thanks to all these steps, not only will you succeed in getting new customers, but you will also be able to retain those who already trust you.

To go further in your reflection, we invite you to read our article "[How to succeed in BtoB commercial prospecting?](#)".

WHAT ARE THE BEST PROSPECTING TECHNIQUES?

Whatever your sector of activity, commercial prospecting is essential if you want to develop your company's turnover. But how to prospect in an efficient way? We present you the infallible methods that will allow you to succeed in commercial prospecting.

PHONE PROSPECTING TO FIND NEW CUSTOMERS

If commercial prospecting has evolved a lot in the last few years, especially thanks to automation, there is nothing like a well conducted telephone prospecting campaign. But it is important to do it right, as any wrong approach can be very detrimental to the customer experience.

Using a basic script during the prospecting stage can help new salespeople avoid, or at least reduce, awkward pauses, use the right tone and answer common objections.



During a cold call, **the first impression is often decisive** and can strongly impact the quality of the business relationship. Making sure that you give a positive first impression to each customer is therefore a major challenge. By introducing your name or your company to the prospect even before your first call, you increase the chances of receiving a warmer welcome.

You will then **practice active listening**, an essential technique for identifying your customer's expectations. While he is speaking, show him that you are listening to him, that your attention is dedicated to him. A customer who feels listened to will find it easier to express his concerns clearly but will also be more inclined to answer the questions you will ask him afterwards. In addition, **be empathetic!** This will allow you to anticipate your customer's expectations and thus satisfy them beyond their initial expectations.

Good salespeople are not aggressive in their telephone approach. Instead, they sell by building trust through honesty and integrity. Don't forget to add an effective call to action to your calls **to guide your new prospects' decision-making process!**

There is also a different type of call: "warm calling" or "monitored calling".

At the commercial level, we have observed 4 different types of "warm" or "monitored" callings in the French, English and Hispanic markets:

1. (re)contacting people who responded on another channel,
2. (re)contacting people who kindly gave us a more relevant contact than themselves,
3. (re)contacting people who clicked on web links (url) sent in a previous message,
4. (re)contact people to invite them to events organized by the marketing team (webinars, trade shows, etc).

Want to go further in your thinking? Read our article ["Do you really need to hire a salesperson who loves phone prospecting to succeed?"](#).

PROSPECTING BY E-MAIL

Sales prospecting by e-mail is possible but people must first be informed. They must also consent to it beforehand if they are individuals or be able to oppose it if they are professionals.

Prospecting e-mails have become essential to acquire new customers. In the age of permanent connection, they are the most widespread method for active prospecting. An e-mail is quickly written, easily sent and costs nothing. It is therefore necessary to learn **how to build and master it for a successful prospecting.**

Your e-mail must include a presentation, even a short one, so that the prospect who reads it knows who you are and why you are sending him an e-mail. The subject of your e-mail must capture their attention right away so that they click on the link to open the e-mail.

47% of people open or not an email based on the subject line alone.

The goal is to write the right words to offer the right solutions related to your business. An adapted and technical vocabulary will highlight your expertise, but also all your strengths.

As you are supposed **to know your persona by heart**, you will use a strategy of personalization by responding perfectly to his needs and expectations. You should not hesitate to put forward a targeted problem and adapted solutions that will enhance your e-mail.

Finally, **add an effective call to action** to your emails to guide the decision-making process of your new prospects.

USE LINKEDIN TO SUCCEED IN YOUR SALES PROSPECTING

Today, almost [all B2B sectors use the LinkedIn professional network](#) to prospect for new customers.

The use of social networks, especially LinkedIn, should not be neglected, as 15% of salespeople consider this channel to be the best way to contact a prospect.

By using LinkedIn correctly, your brand will develop its notoriety. Your company will position itself as an expert in your industry and you will be able to acquire new customers by applying the right sales prospecting method. Nowadays, LinkedIn is recognized as the professional social network offering an opportunity [to generate qualified leads](#).

Your sales prospecting will consist in forming a network of people who could become potential customers. To do this, you will implement a communication strategy that will have 2 concrete objectives:

1. **To establish interesting connections.** Here the principle is based on the use of existing profiles to find other profiles corresponding to your search criteria.
2. **To select groups likely to buy your products and/or services.** What you need to do is to join this type of group and engage with its members. Comment, reply, ask questions, and share useful information with your potential prospects.

This method of sales prospecting via LinkedIn requires a minimum of patience, but it can be very profitable in the long run.

A WEBSITE REMAINS A VERY GOOD BUSINESS PROSPECTING TOOL

Your company's website is a very practical way to present your services or your product range. It must be neat and in accordance with your values and what you offer.

On your website, you will set up **an inbound marketing strategy**. An integral part of any modern b2b prospecting strategy, inbound marketing aims to create content to bring your ideal customer to you. The goal is not to go cold calling, but to work on new leads once they have declared themselves.

93% of companies that have adopted inbound marketing have seen a real impact on their conversion rate.

Your sales team will need to collaborate with your company's marketing department. **Marketing creates content** (articles, white papers, webinars, events...) that meets the needs of your different targets. This content allows you to feed your prospects' thoughts and bring them to maturity (lead nurturing) until they buy.

Your marketing and sales teams are in regular contact to strengthen their approach to prospects. Regular meetings, joint strategies and definitions, lead follow-up: everything is done by marketing **to generate quality leads**, pass them on to sales and support the sales pitch. This is called smarketing.

By bringing in prospects who are already interested and by helping you feed undecided prospects with appropriate content, marketing allows you to shorten your cycles and **accelerate the sales process**.

FACE-TO-FACE MEETINGS WITH PROSPECTS

Meeting your prospects remains **a favorable prospecting method** to convert partners, suppliers, or professionals into potential customers. Indeed, meeting in person is an ideal opportunity to build relationships in an efficient way. Events such as trade shows, conferences... can be very good opportunities to prospect and make yourself known!

During these meetings, your main objective will be **to build trust** and to position yourself as a leader in your industry. This prospecting technique allows you to familiarize your leads with your name. The goal is to find new partners. To do this, you will start by giving advice before **offering an effective solution to your partners.**

Of course, this prospecting technique requires a lot of availability to attend multiple events where potential prospects are participating. But it is the best way to give yourself a good impression and to choose your prospects directly. Its success lies in **knowing how to convince your clients.** If you do it well, this prospecting will prove to be very profitable in the search for qualified prospects.

If it is true that between 2020 and 2022, face-to-face meetings have been greatly reduced because of Covid-19, the years 2023 and post-2023 seem to be again very conducive to live/face-to-face meetings. Be careful, however, not to neglect the preparation and follow-up phases before and after the face-to-face meeting to have the best commercial efficiency.



Sales prospecting is a crucial step for the development of your company

IT IS IMPORTANT TO CONDUCT IT CORRECTLY!

Although commercial prospecting is not always an easy exercise, by combining several methods simultaneously, you put all the chances on your side to reach your objective.

Indeed, only diversification of business prospecting techniques will enable you to acquire a greater number of prospects.

Today, the majority of salespeople use outdated and ineffective techniques rather than effective processes that could generate a higher number of qualified leads. Yet, just like the other stages of the sales process, it is crucial to put all your efforts and attention into it.



To save time and increase the productivity of your teams, [outsource your sales prospecting](#) to **Finelis** and **Finelis Coaching!**

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