



Sales Best Practices
Successful tactics!



Key sending moments that matter. **Timing is key.**



Celebrate moments that matter to your prospects
And make a human connection



Motivate prospects
To take a meeting



Incentivize leads
to take meetings and show up.

Catch Their Attention

Drive Interest

Book the Meeting

Meeting Attended

Pipeline Built



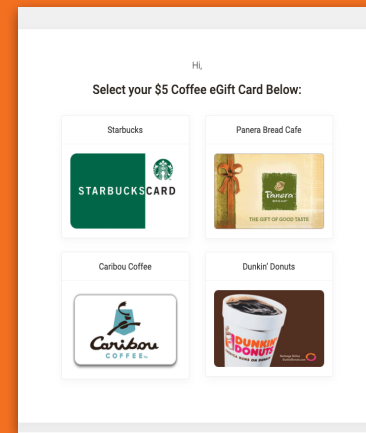
Stand out of the inbox
with a highly personalized item and message



Drive interest for your product and brand
with branded content and swag

Common Sales Use Cases

- Meeting Setter/Door Opener
 - cadence
 - Egifts, Sendoso Direct
 - Follow-Up - Marketing Driven ABM campaigns
- Meeter Reminder
 - semi-automated morning of meeting
 - Egifts
- Deal Accelerator
 - manual 1:1
 - Amazon Sends, Sendoso Direct
- Closed/Won Deal
 - automated
 - Bundle/Swag Bomb





Creativity is the new sales hack

The Art of the Send

Step 1: Research and understand your recipient so you can deliver something *relevant* to your contact.

Remember: You're trying to achieve a certain outcome - but you have to make it about *THEM*. You can tie most anything back to your company's value prop, but you have to catch their attention first!

Where to Search

LinkedIn can be a treasure trove!

- What is their role? What is their industry?
- **Posts:** What are they curious about? What do they share? What matters to them?
- Is there anything **PERSONAL**?
 - Where did they go to college?
 - Where they part of a Greek organization?
 - Do they have charities listed they donate time to or support?
 - Do they mention a pet? A family?
 - Are their business influencers they follow?

Ask Google

- Can you find another social media page? Facebook, Twitter, Goodreads (social media for book lovers, it can be gold. Books are always a great send).

Step 2: Use these details to choose an experiences that will stand out, but make sure to tie back to your company/product and the **why** behind the send.

Remember: If you're using a personal piece of information, tread carefully and be *clear* why you're sending. The lines between business and personal lives are blurring, but it's wise to stick to safe topics. Anything mentioned on LinkedIn is generally fair game.

Bad Send:

- Example: A VP posts a photo on Instagram of a bachelorette in Vegas.
- "I see you partied in Vegas recently - here's a cocktail kit to keep the fun going!"
 - Not business appropriate. Does not tie back to your product or ask. Will come off as creepy.

Good Send:

- Example: A sales leader posted a photo on LinkedIn enjoying a celebratory cigar.
- "As someone who enjoys *a celebratory cigar*, it's important to have a *good cutter*. Similarly, as a *sales leader*, it is equally important to have a *good tool to sharpen the skills of your sales reps*. Are you open to blocking off some time to unpack how {company name} is the "cigar cutter" to your team at {company}?"
 - Reveleant to contact. Ties back to why your sending. Asks for meeting.
- **Don't overthink!** An alternative send could have been a bottle of Champagne for a congrats and to celebrate with them!



The Play: eGifts

eGifts are sent in real time! So you can make an instant impact.

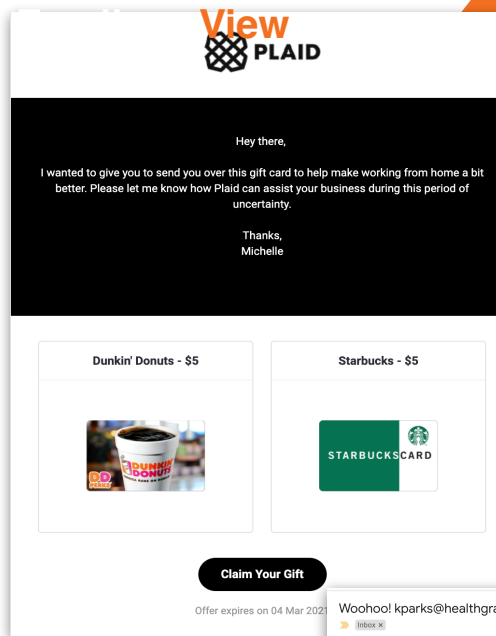
Two ways of sending egifts:

- Send Via Sendoso Generated Email with a templated note.
- Generate a link to embed in an email
 - egifts have a better open rate when a link is generated and added to your own email outreach.
 - **PRO TIP:** Send link via a LinkedIn Message

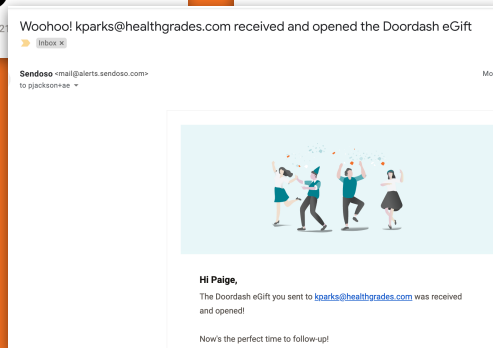
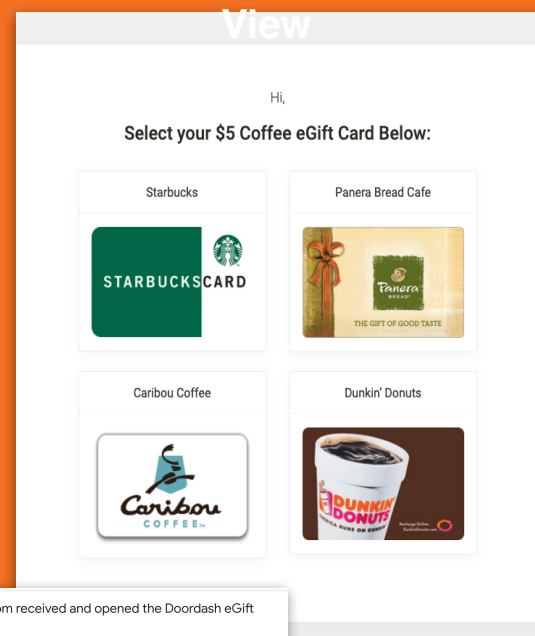
All eGifts have tracking! Get alerts when your contacts, open the email, click and redeem your gift card.

- Best Practice: Follow up shortly after egift is opened

Sendoso Generated



Redemption Link



Send egifts via LinkedIn Inmail!

I saw that you registered for CONNECTED happening tomorrow so grab a coffee on me to enjoy the full Sendoso experience :)

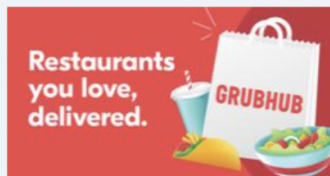
<https://sendo.so/g/aysR4Jm>



The Sending Platform | Sendoso

app.sendoso.com • 1 min read

Not totally sure how open things are in Boston, but over here we are still very closed. Have a fun lunch delivered on me today; <https://sendo.so/g/qvdsxAYm> :)



Select Your eGift Card Below.

app.sendoso.com • 1 min read

The Play: Sendoso Direct

Its sweet to meet you
Bake up some great customer experiences
We want to help you grow
Plant some new ideas
Brighten up your WFH space/desk
Cultivate customer success
Grow your solutions
Mix up success
Shake up your customer experience
Cheers to you
Send you a “taste” of..
... it's a piece of cake
Just wanted to “pop” by and say congrats

Tip: Shareables & sweet treats are great for people with families or roommates.

Pro Tip: Check what day the vendor ships (i.e. cupcakes ship on Mondays or Tuesdays) and mention in your email to drive confirmation urgency. “I want to make sure it you don't have to wait!”



½ dozen Donut Kit



Baked by Melissa Cupcakes



Peace Lily Plant



Desk Succulent



6 Assorted Cookies



El Pepino Margarita



Farm Girl Flowers



Treat Yourself Cake

The Play: **Swag Sends/** **Custom Bundles**

Step 1: Build your own Swag boxes & Add a Custom Handwritten note!

Pro Tip: Include your name and contact information on the signature of the note. So they know who the package is from and how to thank you.

Best,
Paige @ Sendoso
pjackson@sendoso.com

Step 2: Generate an address confirmation link (vs. having Sendoso send the confirmation email) and embed in a *personalized* email. This will have a better confirmation rate.

Step 3: After your package arrives you will receive a delivery notification email - it is crucial to **follow up within 24 hours!**



The Play: Amazon sends

Never start a cold outreach with a physical send. A physical send should be after at least one initial email or phone call touch(es).

Step 1: Choose your gift from Amazon

Pro Tip: Choose a Prime item. It will arrive to the Sendoso warehouse faster and help your item arrive more quickly.

Step 2: Choose the contact via Salesforce sync, and generate an address confirmation link (vs. having Sendoso send the confirmation email). Embedding the confirmation link in a *personalized email*, will see a better confirmation rate.

Step 3: Include your name and contact information on the signature of the note. This note is included in the package with your Amazon item. That way your recipient knows who the package is from and how to thank you.

Cheers,
Paige @ Sendoso
pjackson@sendoso.com

Step 4: Average time between ordering on Amazon and delivery is 7-9 days. After your package arrives you will receive a delivery notification email - it is crucial to **follow up within 24 hours!**

☒ Ask recipient to confirm their address. ?

☐ Don't send my package if the recipient doesn't confirm.

☐ Send my package even if the recipient doesn't confirm.

How would you like to send it?

Sendoso \$490.36 PJ Paige Jackson ▾

 Tervis Arizona Wildcats Tumbler with Emblem...
Cost Per Item: \$21.99
Quantity: 1

Your Touch 
Touch Name: WFH-03-0500-Amazon-Send-Anything
Amount: \$100.0

Who's getting this box? [+ Add Person's Info](#)

Your Note [+ Add Your Note](#)

How much will this box cost?
Estimated Total \$43.49



Send

Best Practices

Physical Sending

Tips & Tricks to getting Addresses Confirmed

- ****Never** start a cold outreach with a physical send. A physical send should be after at least a few initial email and/or phone calls **
- Include your send offer in the **first or second sentence** of your email. If you bury it deeper in the email, they likely won't see it and your confirmation success will drop.
- **Make it punny!** When the contacts are colder, more clever and funny messages will get a better response.
- Try **including a photo** of the gift you want to give! It'll get them excited, build trust and improve acceptance.
- If you don't have a photo, **try a related giphy** in your email! Gifs get great responses.
- Generate an address confirmation link (vs. having Sendoso send the confirmation email) and embed in a **personalized** email. This will have a better confirmation rate. These links work great in LinkedIn Messages as well!



Customize your Address Confirmation Requests

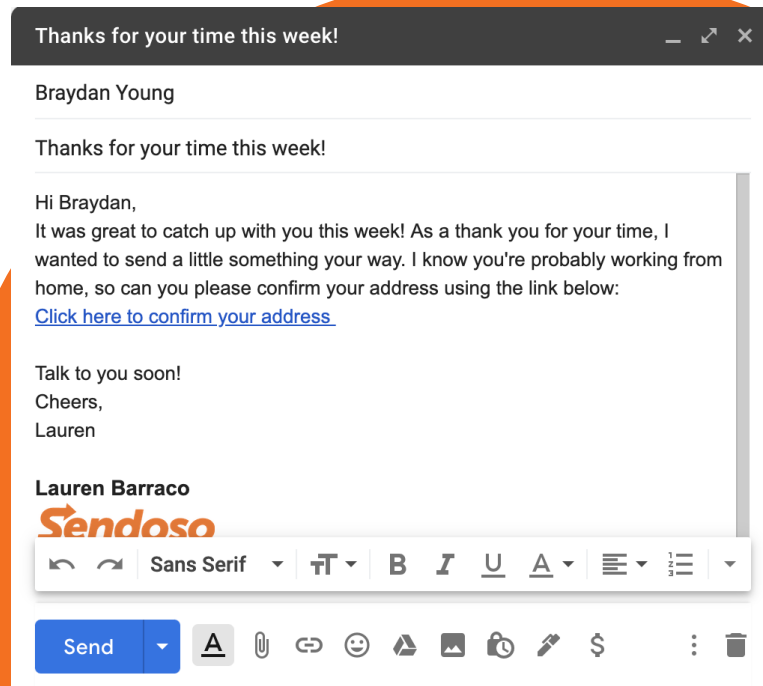
Greater flexibility & customization with Address Confirmation.

What it does:

Generate a link for Address Confirmation that you can add to your personal emails. Links will take recipients to our Address Confirmation landing page; will expire in 2 business days

Why it's cool:

Customize your message by adding Address Confirmation links as CTA's directly to your emails



Sendoso Best Practices

- Don't start with a Sendoso gift - you're more likely to get a better response with Sendoso if the gift has been preceded by 3-5 calls/emails
- Use insights you can glean from your prospects LinkedIn or Twitter account to **personalize your gift and messaging**
- Most physical gifts will allow you to include a brief note with the shipment - **keep it simple and make sure to include your name and contact info**
- Follow up with a phone call or email **within a few hours** or same day of delivery of any physical item - immediate and consistent follow up for the next 25 days is key
- Make sure your follow up cadence **includes multiple touchpoints** (at least 5-7 after sending a gift with Sendoso)



Sendoso Best Practices

- Sendoso integrates with your tools (Outreach, Salesforce) and these integrations are the fastest and easiest way to send something to a prospect
- **You do not need your recipient's address** in order to mail something to them - use Sendoso's Address Confirmation feature to securely ensure your gift gets delivered to the right place
- Sendoso can email eGifts and Address Confirmation forms directly to your prospect but to maximize the personalization and likelihood of response, **use the "Generate URL link" option** and insert the link into your own email or LinkedIn message



Best Practices

- Best Practices
 - Fold an eGift into your cadence prior to your most common conversion point to decrease time to conversion
 - Use physical sends on decision makers or anytime you find a great social media tidbit you can leverage
 - Create a separate cadence for follow- up
 - The first should be a cadence that will either end with a DM send OR you will identify engaged prospects from and leverage digital or physical gifts. This could just be one of your existing cadences.
 - The second should be a follow- up cadence to be used upon receipt of the email delivery notification.
 - Make a phone call with 1-2 hours of delivery notification. It doesn't have to be the first follow- up step, but we see higher conversions on the phone during that period.
- Follow- up and Messaging
 - Subject lines:
 - Reference the package you sent that has been delivered
 - “About the ____ I sent you”
 - First follow- up message:
 - Leave a couple of lines in the top of the email for personalization and be sure to reference what you sent and why you sent it (especially for targeted items off of the Amazon Buy & Send).
 - Tie back to value

Best Practices, cont'd

1. Always leverage [address confirmation](#) when sending physical items!
2. Always include a signature
 - a. Full name, company and best contact info (email, phone)
3. Follow up upon delivery
 - a. Best practice is to follow up the same day or next day - strike while the iron is hot!

I saw you were a fan, so I went ahead and got you this awesome mug on me. Here is the [Address Confirmation](#) link where all you do is click, update, and let me handle the rest (We don't share or store this info). I mean check this mug out!!! It's perfect for NASCAR season!



Now, more than ever personalization is the playbook leading my vehicle to it's victory lap. As you say "never met a stranger" -- we're living in a time where thoughtful outreach is essential in engaging. Whether its driving attendee rates up at events or generating sales leads, I'd love to connect with you about how my team at Sendoso is racing to the finish line.

Are you free sometime this week to share 20 minutes with me?

Messaging

SDRs - Outreach Sequences

SEQUENCE NAME C2:

ABM (Engaged Marketing)

AUDIENCE:

Tier 1 / High Engagement | Estimated # - 250 | 1:1

Touches 1-3

Touches 4-6

Touches 7-9

Touches 10-12

Touch 1: Email - G2

Touch 2: Inmail

Touch 3: Phone Call

Touch 4: Send - Donuts

Touch 5: Email Follow Up

Touch 6: LinkedIn - Bump

Touch 7: ALL - Value

Touch 8: Phone Call

Touch 9: ALL - Case Study

Touch 10: Send - Hail Mary

Touch 11: Email Follow Up

Touch 12: LinkedIn - Bump

Cadence Structure

Outbound Prospecting Cadence

Day 1

Follow- Up Cadence

Step 1: Phone

Step 2: Email

Delivery Day

Step 1: Phone - within 2 hours of item delivery

Day 3

Step 2: Email

Step 3: Sendoso eGift (in an email)

Day 2

Day 4

Step 3: Email

Step 4: Phone - No VM

Day 4

Day 5

Step 4: Phone

Step 5: Phone

Step 5: Breakup Email

Step 6: Other - Social Touch of choice

Day 7

Step 7: Sendoso Amazon Buy & Send or Shareables

Day 10

Step 8: Phone - Use Drop VM



SAMPLE MESSAGING TO USE

I saw your LinkedIn post about your new handsome fella, and I just wanted to reach out on behalf of Sendoso to say congratulations!

I'd love to offer you a giftcard to Buy Buy Baby. Just click [here](#) to download it, and shop away.

I also saw via LinkedIn that you're a fan of memes, so I thought this would be fitting:

Coffee send-

Demand Gen Manager: (background: tried to reach her via email/calls for a while, got an OOO email and sent this when she was back in office): "You've probably got a "latte" on your plate with coming back to the daily grind of Demand Gen Manager, enjoy a coffee on me & I'll be reaching out soon to show you how we are helping companies like yours roast their competition!"

SAMPLE MESSAGING TO USE

Here is a donation to the charity from me: <https://sendo.so/g/aT90aPjm> (you simply click the link and it will take you to Charity Choice where you can donate it--let me know if you have any issues).

In todays climate, it's all about making connections and personalizing touch points. At Sendoso, we are the leading Sending Platform and I'd love to share the opportunity to chat about how we gift our clients and prospects to boost engagement, revenue, and fuel our pipeline.

Do you have 20 minutes to share with me this month?

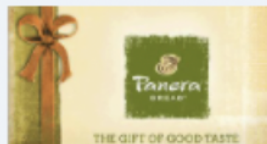
Best,

Linkedin Message

We made it - it's finally Friday, have a coffee on me; <https://sendo.so/g/NiYX9gUPt0CAQ>

I sent you an email giving you an update on your champagne order. It says it is still processing, but I just wanted to keep you updated!

Best,
Emily



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app.sendoso.com • 1 min read

SAMPLE MESSAGING TO USE

Cookies send: messaging can be used for a variety of *sweet* treats and personas-
“Don't want to sugar coat this, but it'd be sweet to connect. As the **(DoM)**, you know attempting to reach your target customers can sometimes crumble. Let me show you how Sendoso can be the secret ingredient in your recipe for success. Be reaching out soon!”

Succulent-

Demand gen manager: “Wanted to plant the idea that we should connect! As the Demand Generation Manager, "succ"-essful outreach is rooted in getting your target customers' attention. Let's dig up some time this week or next”

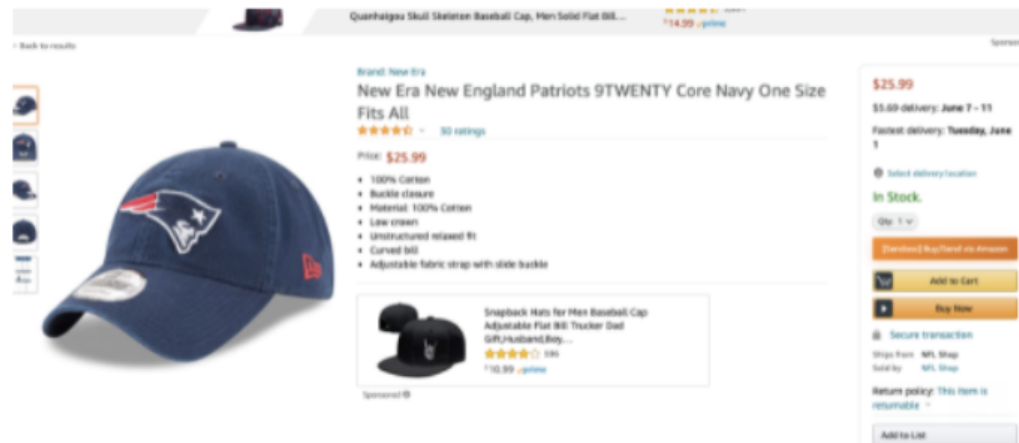
Non-specific Marketing role: “Wanted to plant the idea we should connect! In your role, a "succ"-essful outreach is rooted in getting your target customers' attention. Let's dig into how we're helping teams weed through the digital noise & stand out from the competition!”

SAMPLE MESSAGING TO USE

I was thinking about what Bill Belichick's sales playbook would be like this morning. Kind of weird to imagine, I know, but think about it. It would probably combine tried and true methods along with innovations that differentiate his team from his competitors and give them an advantage.

I think it would include a [sending platform to send personalized gifts](#) and stand out from all the calls and emails to prospects the competition is sending. This is proven to amount to [more deals in less time](#).

I saw you are from MA and played football so I made the assumption you're a Pats fan. I'd like to show you our platform by sending you a gift (think of it as research and development!) I'd love to send this Patriots hat (or something else of your choosing) from our [Amazon integration](#).



I just need to send you a secure link to confirm your address. What do you say?

Follow-up Messaging Template

As someone who _____, it's important to _____. Similarly, as a {persona}, it is equally important to _____. How does blocking off some time sound to unpack how company name is the (item you selected) to your team?

- **Examples:**

(VP of Sales @ Uber) “As someone who enjoys a glass of wine, it’s important to enjoy the full experience and enhance the taste. As a sales leader, it is equally important to enhance the quality of the sales conversations your reps are having. How does blocking off some time sound to unpack how company name is the aerator to your sales team?”

(VP of Sales @ Porch) “As someone who is an avid climate enthusiast, it’s important to have the right tools to track rising temperatures. Similarly, as a sales leader, it is equally important to have rising temperatures within your sales team when it comes to closed-won opportunities. How does blocking off time sound to unpack how company name is the temperature increase to your sales team @ Porch?

(VP of Sales Thomson Reuters) “As someone who enjoys a celebratory cigar, it’s important to have a good cutter. Similarly, as a {persona}, it is equally important of having a good tool to sharpen the skills of their sales reps. How does blocking off some time sound to unpack how company name is the “cigar cutter” to your team @ TR?

SAMPLE MESSAGING- CLOSED LOST REACHING OUT!

I'll get right to it-- After our initial meeting back in 2019 it seemed like it wasn't the right time to implement our platform.

Since then, we've added [new features](#) and revamped our pricing structure. I'd love to reconnect and chat about all the ways in which we've improved. To sweeten the deal, I'll even send you a wine tasting kit from In Good Taste if you can make some time for a meeting.

Do you think it's worth taking another look?

Let me know,
Alyssa

Since we did have a meeting about 2 years ago and you shared interest but the timing wasn't right, what are your thoughts on hearing all of our new integrations and sending strategies with Sendoso?

I want to send you out a champagne bottle as a reminder of our sends and as gratitude to your success with our new feature, [Address Confirmation](#):



Yes, you totally deserve this and it gives you a taste of what is possible with Sendoso. Is this the best email address to send this?

Talk soon,

SAMPLE MESSAGING- GIFT OPTIONS IDEA

That's a huge deal, Congratulations! I would love to send you a tangible example from our sending platform to help celebrate. Please let me know which option below you would like me to send out to you:

1. A bottle of wine (your choice of red, white or sparkling) 
2. A donut decorating kit 
3. A succulent for your desk 
4. A charity egift of your choice!

Also, I saw that you attended CONNECTED. What was your favorite part?

Let's schedule some time to do a high level overview of Sendoso and show you what has worked for other companies to stand out from the crowd! You can add time on to my calendar; <https://sendoso.chilipiper.com/book/me/kyndall-wagonblott> Or you can let me know a time that works for you this Wednesday.