Foundational GTM Checklist

Outbound Sales Prioritization | Bombora Playbook

Use this checklist to set the foundation for the Playbook for Outbound Sales Prioritization.

You should already know or document as many of the following as possible. Not all are necessary, but the more that can be provided, the stronger signal you'll be able to create, and the more successful Playbook you'll run.

Basic Needs:

- ❑ 100+ closed/won accounts associated with the products driving each of the core sales signals.
- ❑ A list of competitors and/or associated partners.
    - ❑ Within the list of competitors, provide the products or services that you compete with each directly.
    - ❑ Within the list of partners, provide the products or services that your partners support or are integrated with.
- ❑ Web content that has a laser focus on the product/messaging for each product/service.
- ❑ A list of top organic keywords associated with each product/service/persona

Technical Information:

- ❑ Where will your intent data live? CRM or MAP, Bombora UI, etc.
- ❑ How do your Sales Reps use this tool for account management? (ex: They use accounts + contacts in SFDC; They work out of List views, dashboards, tasks; Etc.)
- ❑ Are accounts assigned to your sales reps in your CRM/MAP platform? At what stage? Is it manual or automated?

Go-To-Market Strategy:

In this section you will establish or compile information about your GTM strategy and resources that will help us execute as we move through this playbook.

Market & Product Information:

- ❑ Do you have multiple products? If yes, how are your outbound resources organized against these products?
  - For example: "We have 3 products, but our SDR team is focused on just one of them."
  - Or "We have 2 products and two unique teams that support them."
- ❑ How is your sales team structured to support those?
  - ❑ Will each of them need their own prioritization structure?
  - ❑ Is it based on size of account, industry, product type?
  - ❑ Do they sell across your portfolio?
- ❑ How do your SDR/ISRs support and align to your sales team?
- ❑ Do you have unique messaging and outreach strategies based on persona?
  - ❑ Or messaging based on specific features/functions of your products and services?
  - ❑ Do you have defined "sales plays"? If yes, do the sales plays have defined content/talk tracks/nurture cadences?
  - ❑ If you were to receive a list of accounts showing intent today, do you have the ability to source contacts and follow up with those accounts with specific messaging and content?

Sales Team Structure

- ❑ How are your SDRs/ISRs compensated? Is it based on meetings, opportunities, other?
- ❑ How is marketing compensated? Is it based on leads, meetings, opportunities, other?

- ❑ What is your current mix of inbound vs outbound opportunities, and more specifically what percentage of time is your sales resource following up on a lead that “did something” vs. executing cold outbound prospecting?
- ❑ Describe your understanding of your TAM/ICP, and the population of accounts and contacts for your TAM/ICP inside of your systems.
  - ❑ Do you have a target account list built or are you looking to Bombora to provide you a target list of accounts or a blend of both?
  - ❑ Do you have any appetite for net new accounts that are not in your system?
    - ❑ If yes, what is the criteria for those accounts in terms of Firmographic data?
- ❑ Discuss how you track your outbound sales effort today and “what good looks like” (ex: Meetings set, opportunities set, length of sales cycle, etc.)

Sales Metrics for Benchmarking

Additionally, there are a few metrics you will want to have benchmarks for ahead of implementing your intent strategy:

- ❑ What is your lead to meeting conversion rate? (Leads given to SDR/ISR that turn into meetings)
- ❑ What is your meeting to opportunity conversion rate? (Meetings your SDR/ISR set that sales then decides to work) How long does this take usually?
- ❑ What is your opportunity to closed won conversion rate? How long is this sales cycle?
- ❑ What is your average sales cycle time?
- ❑ What is your average sales price/deal size?