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Short-Term & Long-Term Metrics
Outbound Sales Prioritization | Bombora Playbook

Use this checklist to decide what short- and long-term metrics you'll track when implementing the Playbook for Outbound Sales Prioritization.

Note: It is important to track these metrics in your CRM, MAP or other tools that your customer account managers can reference. Therefore, set up these tracking channels before you implement your Playbook.

Remember Your GTM Foundation:
We mentioned a few additional benchmarks at the start of this playbook under the foundations section. Those are also good to ensure you will be able to measure other areas of impact to your business.

Short Term Metrics
In the short term, it's key to measure the effort that your team is taking alongside the initial responsiveness of the targeted accounts.

Additionally, you want to look at their process and if they are indeed following the prescribed strategy & process. Are they sourcing enough contacts for the sequence, are they the right titles, are they using the prescribed follow up sequences? Each of these steps is vital to follow for your strategy to be a success, because without them, intent data is simply data.

Team effort of your Sales Reps:

- ❑ # of contacts at each account a sales person must target
    a. This isn't a warm lead-based program and most demand units are made up of 5-7 contacts. Ensure your sales team has a clear understanding of what titles/personas to target and corresponding compelling message for each.
- ❑ # of touches / calls / emails are expected for each rep
    a. What types of outreach are mandatory?
    b. Best practices from our partner Outreach show that a mix of touches across phone, email, social, and direct mail are most effective.
- ❑ # of accounts they should reach out to per week

a. If they don't have enough accounts to reach out to, Bombora can help surface more accounts by tweaking certain settings within the Signal(s).

TIP: Account for the downstream impact and volume of your outreach steps and sequences. Reps can quickly become overwhelmed if they are adding 3-5 accounts a day to their outreach sequences. It is necessary to look at the mix of automated vs manual touches. (eg: 5 contacts x 3 accounts x 5 working days = 75 people in a multiple step sequence per week or 300 a month. This can lead to 300 manual touches required against unique contacts in a single day depending on sequence structure)

Initial Responsiveness of the Targets:
It is important to benchmark the below metrics before you start your program so that you can measure any improved efficiency driven by intent data

- [ ] Email metrics: Open rate, click rate, replies, etc.
- [ ] Have a test & iterate plan here with your Product Marketing, OBR team, and others to test different subject lines and CTAs
- [ ] Phone metrics: return calls, answers, quality conversations
- [ ] Meetings set: if accounts set up an initial meeting/call after receiving an email or initial phone call

Long-Term Metrics

Beyond these short-term metrics, most Bombora customers measure the business impact of intent data in four main ways:

- [ ] **Deal Size:** When there is a significant spike in research from a prospect it is often indicative of a more substantial project and many Bombora customers see that manifest in larger deal sizes.
- [ ] **Volume of opportunities/meetings:** Running this playbook should help you generate a higher volume of opportunities, meetings, etc. depending on your internal measurement point.
- [ ] **Speed to close:** Due to the fact the prospects that are being prioritized with this Playbook have already been doing research inside of a potentially well defined project, customers often report faster sales cycles.
- [ ] **Win-rate:** Because these accounts are spiking in research and Bombora customers are often able to get into conversations earlier in the deal cycle and shape the conversation, typically see a lift in win-rates. This is mostly due to a reduction in accounts not in a purchasing cycle.

Ideally, you will be able to measure all of these. Some customers see success across all four, others maybe two or three, and in a worst case a customer may see significant gain in one area. Measuring all four will allow you to attribute more success to your program, and in turn allow you to expand the data into more and more playbooks over time.

TIP: Keep track of the Signals that attributed to the results that were the most beneficial – and least – so you can reevaluate your Topics, Signals, and overarching messaging.