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5-Step Formula for Sales Sequence Optimization

Creating an effective outbound campaign

can take upwards of 8 hours per sequence (and that's with an experienced team). The work doesn't end once the campaign launches - in fact, it's just beginning. To master outbound prospecting, you need testing, iteration, and optimization.

Optimize for the Right Metrics

Optimization always comes back to what you measure. While engagement may seem difficult to quantify, you should design reporting based on the metrics that are most indicative of your goals. Whether that be form fills, MQLs, or new revenue; define your quotas and track your results.

So many people are distracted by the wrong metrics : opens, replies, clicks, lack of unsubscribes, etc. While each of these numbers plays a role in the big picture of your campaign, none of them are indicative of your actual goal. For instance, if you have amazing reply rates but all of your prospects are replying that they are uninterested, your reply rates only indicate that you have a polite audience - not that your campaign is successful. Vanity metrics can distract from what matters.

Instead, utilize vanity metrics as metadata rather than indicators of success. For instance, reply rates may or may not indicate that your messaging is effective, but it does mean that your message is making contact. Open rates don't inherently translate to interest, but they do indicate that your email is landing in an inbox rather than spam. Vanity metrics are breadcrumbs towards success and should be examined as such.

Be an Outbound Scientist

Your sequence strategy is driven by your audience. The first step to develop any strategy is to define your ideal customer profile and buyer personas. Your ICP will encompass your total addressable market while your buyer personas will hone in on the multiple segments within your audience. A defined ICP and buyer persona will help you to resonate with your market.

While a wide-net approach is appropriate for some markets, you'll likely have the best success with segmenting your campaign. Instead of using a one-size-fits-all strategy, use your buyer personas to define your messaging, call to action, and channel.

Keep in mind that there are several approaches that might resonate with any given buyer persona. From tone and voice, to value proposition and pain point, you have multiple variables available to create your perfect formula. While you're testing your approach to each buyer persona, you'll also need to test the personas themselves. If you're reaching out to 5 different personas and only 2 are converting, you'll need to re-evaluate your approach.

When testing your campaign, A/B test for multiple variables. Within the same buyer persona, shift the tone, channel, or value proposition. Focus on testing strategic attributes rather than nuances. For instance, if you're reaching out to really tactical titles within an organization, you might lean towards straightforward messaging in a professional tone. But how do the same prospects respond when you interlace your value proposition with a subtle yet witty demeanor? How does your audience respond to LinkedIn compared to email?

Never stop testing; your audience likely enjoys multiple marketing flavors. By testing inherently different strategies, you'll continue to hone in on the perfect sequence for your audience. Keep in mind that even the most effective campaigns should be refreshed every 3 months. You don't need to reinvent the wheel here but small pivots can keep your audience engaged over time.

Move Fast

When optimizing your outbound sequence, don't hesitate to turn off what isn't working.

Before you begin testing, define the minimal variable to prove or negate your test as well as your own internal benchmarks. For instance, maybe you want to contact 200 prospects to establish that any given step has been tested. Of those 200 prospects, you need 100 to move into marketing qualified leads to meet your sales goals.

Keep in mind that each step in a sequence will likely produce different results which is why it's important to understand your anchors versus influencers. For example, an intro email explaining who you are, why you're reaching out, and what you want out of this correspondence is an anchor; whereas a follow up email or LinkedIn note is an influencer. Influencers tend to create the highest conversion rate where the anchor is a reference for them to come back to. Influencers are simply reminders to get your audience to go back to the anchor and engage with you. As such, you should have different expectations from these different points in your campaign.

For every campaign, create a contingency plan. For instance, maybe you think that sales directors will respond best to a strategy that focuses on time wasted cold calling. You A/B test two campaigns with that messaging, one with a humorous tone and one with a straightforward tone. After your initial test, you are experiencing conversion far below your benchmark. Already waiting in the sidelines is your contingency campaign, focusing instead on increasing commissions and guaranteed ROI. Instead of wasting time, money, and prospects while you evaluate your failing campaign, consider the many outcomes of your campaign up front.

If your campaign doesn't create the impact you wanted, review your results and pivot your strategy. Are you getting a response? What are your prospects saying? Use both qualitative and quantitative data to poke holes in your current campaign and identify where it's broken.

Focus on Your Formula

By understanding your campaign's efficiency, you'll always set yourself up to always hit your quota.

Efficiency depends on your conversion rate. If it takes 20 prospects to get one meeting and you need 15 meetings this quarter, you'll need to design a system to reflect that. There is a certain amount of 'fuel' (prospect volume) needed to make any given campaign successful. Keep in mind that there are different benchmarks within your sequence that may indicate your progress or obstacles.

Let's go back to our example above; you know you need 15 meetings this quarter and it takes 20 prospects to get one meeting. Of the initial 300 prospects needed, you know that you need 50% of those to move to marketing qualified leads. From there, you need 50% of those to move into your next step, so on and so forth. Overtime, you'll learn your 'normal' at each step in your campaign. This will help you to identify where your process is strong and where you can improve.

For most companies, it is easier to expand your prospect pool than to increase efficiency, but both should be on your radar. If your buyer persona is narrow and you only have a few prospects to engage with, you need to see a high conversion rate. Without it, you'll run out of fuel long before your prospects convert. If you find yourself with both low conversion rates and a niche audience, you'll need to rethink your strategy. Identify why your campaign is not converting and scrap the whole sequence or create a broader buyer persona that can take you towards your meeting goal.

The best performing companies in the space live in an efficiency equilibrium - they are always looking to improve conversion rates but are always going to hit their goal because they understand their own formula. They know how much fuel is needed for a powerful engine.

Iterating an Outreach sequence takes time, expertise, and strategic thinking.

That's why we created REGIE, allowing you to strategize, optimize, and launch a campaign in under 5 minutes.

Book a demo to learn more.

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