

Salesloft.

Cadence Best Practices

For High-Performing Teams



 @Salesloft

Updated 2021



Effective Customer Engagement

Throughout the entire customer journey, the best revenue teams have a consistent, multi-channel cadence to communicate with their buyers and customers. This playbook contains best practices guides for each stage of the customer lifecycle.



Cadence Playbook Contains:

- Frameworks backed by Data Science and proven by Salesloft customers
- Benchmarks and execution tips for each Cadence
- Step by step explanations for every action across all engagement channels

S	Generate Demand		Build Pipeline		Close Deals		Drive Success <i>Non-Commercial</i>			Renew & Expand <i>Commercial</i>	
	Event Engage	Nurture	Inbound Response	Outbound	Meeting Setup & Follow up	Closed Lost or Gone Dark	Drive Adoption & Usage	Engage At-Risk Accounts	Exec Customer Alignment	Upsell & Cross-Sell	Renewal
Marketing	✓	✓	✓								
SDR	✓	✓	✓	✓	✓						
AE	✓	✓	✓	✓	✓	✓					
AM/CSM	✓						✓	✓		✓	✓
Exec	✓								✓		

Links to Specific Cadence Frameworks

Generate Demand

Event Engage

- [Pre-Virtual Event Cadence](#)
- [Virtual Event Follow Up Nurture](#)

Nurture

- [Nurture](#)

Build Pipeline

Inbound Response

- [Inbound Response](#)
- [Inbound Response Content](#)

Outbound

- [Go-to Outbound](#)
- [High Volume](#)
- [Full Cycle](#)

Close Deals

Meeting Setup and Follow Up

- [Meeting Confirmation](#)
- [Deal Progression](#)

Closed Lost or Gone Dark

- [Closed/Lost](#)

Drive Successes

Drive Adoption and Usage

- [Journey Cadence](#)
- [Optimize](#)
- [High NPS](#)

Engage At Risk Accounts

- [Pilot Engagement](#)
- [Proactive Action](#)

Exec / Customer Alignment

- [Leader Cadence](#)

Renew and Expand

Upsell & Cross-Sell

- [New Rep Intro](#)
- [Cross Sell](#)

Renewal

- [Renewal: 6 Months Out](#)

Bonus Plays

- [Hot Leads](#)

Cadence Key

How to Read the Frameworks In This Guide



Email



Phone



LinkedIn



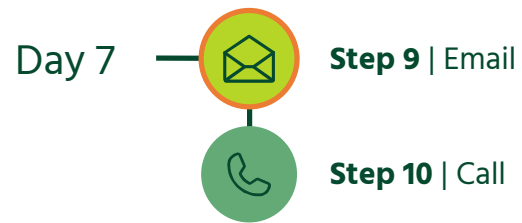
Text



Other



Direct Mail



— Email Steps highlighted in red are meant to be automated. Use cautiously. Templates need to be ready to send with all dynamic fields filled with accurate data.

} When Steps are connected, they are meant to be executed on the same day.

Generate Demand

Event Engage

- [Events](#)
- [Webinar Follow Up](#)

Nurture

- [Nurture](#)

S.	Generate Demand	
	Event Engage	Nurture
Marketing	✓	✓
SDR	✓	✓
AE	✓	✓
AM/CSM	✓	
Exec	✓	

Pre-Virtual Event Cadence

Drive Attendance

Cadence Objectives

- For the most part, in-person events are still not a thing as we head into 2021. This Cadence is built to drive attendance for your virtual events.

Target

- Prospects that you are trying to get a meeting with, or even in a deal cycle with. If it's an in-person event, target geographically.

Tips & Tricks

- Use Automation Rules to trigger leads directly into this cadence.
- Assign the leads to the rep who owns the account, so it can inform their overall account strategy.
- Marketing should own creating these cadences for every event as Team Cadences, and sharing with Sales to drive usage

Engagement Channels

Email	Social	Text
Phone	Phone	Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

2 Weeks =


Time until the event. Start cadence 10 Business Days prior.


[Back to Cadences](#)

Pre-Event Cadence


6 steps over 9 business days


Day 1 —  **Step 1** | Email
Initial invite.

Day 4 —  **Step 2** | Email
In-thread follow up. Will you be able to make it? Here's what you'll get out of it.

Day 5 —  **Step 3** | Call
Call to invite. Leave voicemail.

Day 7 —  **Step 5** | Email
Space is filling up, can I save you a spot?

Day 8 —  **Step 5** | Call
Will you be able to join? If not, I can schedule time for us after to run through the highlights.

Day 9 —  **Step 6** | Email
Event is tomorrow. I'll keep an eye out for you and share what I learned if you can't make it.

Nurture

Don't Break Up with Target Accounts

Cadence Objectives

This Nurture Cadence is built to be used by all reps. It's a club in the bag that can be used in multiple scenarios, from no engagement to situations where timing is off. The goal is to stay connected and bring value.

Target

Prospects who have gone dark or asked to hold off for 3-6 months

Tips & Tricks

- The cadence starts 2 weeks in, giving some breathing room
- Use Automation Rules to trigger leads directly into this cadence when a prospecting cadence ends
- This cadence is email only. If the prospect becomes a Hot Lead in Salesloft, the rep should call to engage from there
- Consider sharing content that is not built by you. Share blog posts from other experts and pull out quick takeaways

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM

AE

Exec

Benchmarks & Goals

11.5% to 12.3%

Conversion Rate of Hot Leads

1% to 5%

Low engagement rates in this cadence are to be expected

[Back to Cadences](#)

Virtual Event Follow-Up

Follow through on Event Attendees

Cadence Objectives

In today's environment, Marketing teams are shifting resources to more interactive webinars for Demand Gen. Drive these leads through to the Sales Team with this Cadence.

Target

Webinar Attendees

Tips & Tricks

- Use Automation Rules to trigger leads directly into this cadence
- Assign the leads to the rep who owns the account, so it can inform their overall account strategy
- The goal here is for the rep who is responsible for the account to start a dialogue around the content of the webinar. Its built for customers and prospects, with the goal of creating an opportunity if possible

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM

AE

Exec

Benchmarks & Goals

2x Increase

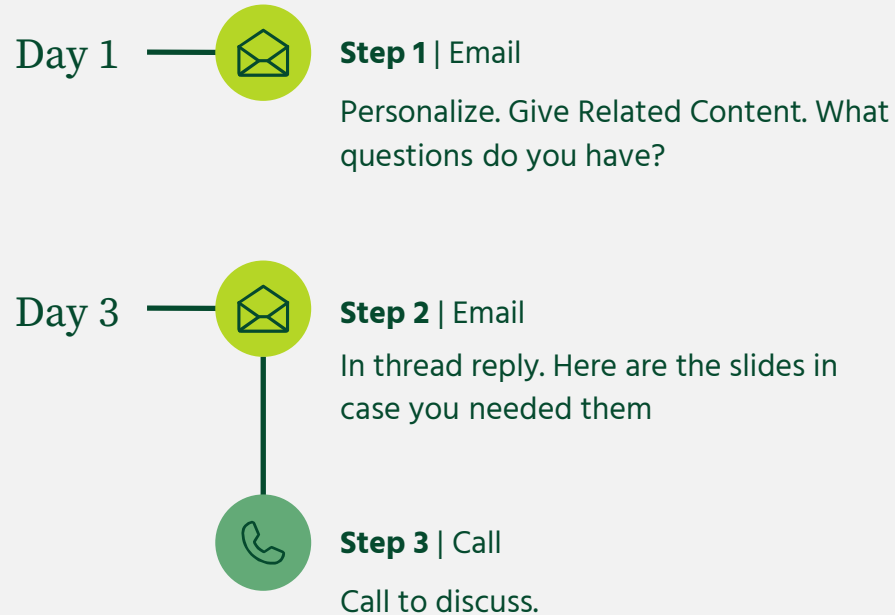
In response rate from email 1 to 2, and 2 to 3. Consistency is key with this cadence.

Back half response rates can be significantly higher

[Back to Cadences](#)

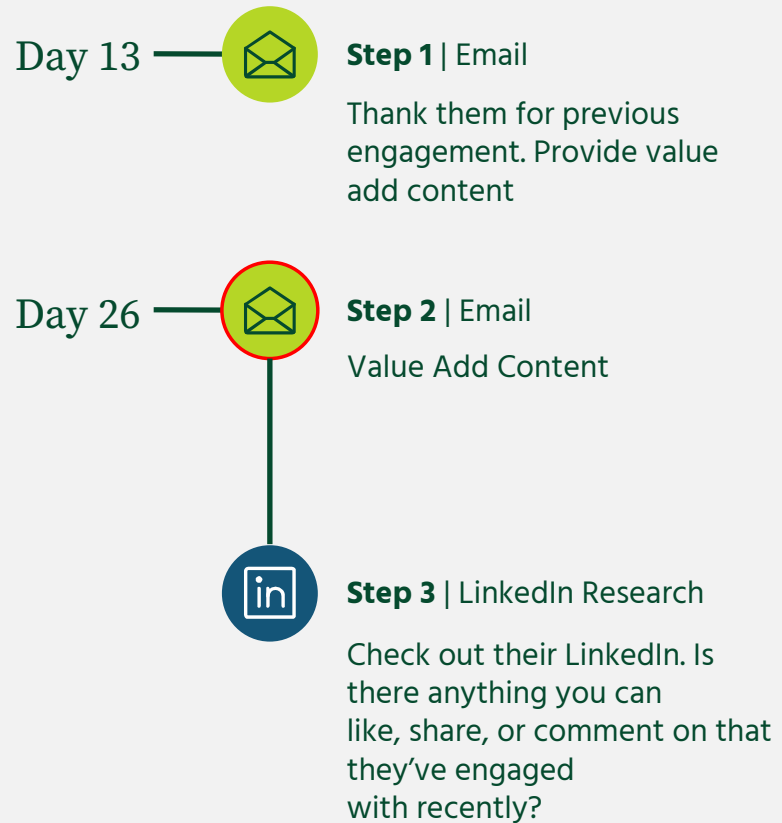
Webinar Follow Up

5 Steps over 8 Business Days



Nurture

7 Steps over 53 Business days



Build Pipeline

Inbound Response

- [Demo Request](#)
- [Content Follow Up](#)

Outbound

- [Personalized/Account Based](#)
- [High Volume](#)
- [Full Cycle](#)

S.	Build Pipeline	
	Demo Request	Outbound
Marketing	✓	
SDR	✓	✓
AE	✓	✓
AM/CSM		
Exec		

Inbound Response

Rapid Response for High Priority Leads

Cadence Objectives

Inbound Conversion rates are highest when a rep responds in less than an hour. The goal of this cadence is to rapidly surface leads to reps, automating the first email, so that we can schedule an initial meeting.

Target

Demo Requests and Contact Us Leads

Tips & Tricks

- Use Automation Rules to trigger leads directly into this cadence
- Provide your Salesloft Meeting Link to make it easier for prospects
- The back half of this cadence is meant to be more the pace of a nurture cadence. Top performing teams will build out a parallel call cadence, triggered by Hot Leads, in order to capitalize on engagement and call at the right time

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM

AE

Exec

Benchmarks & Goals

22% to 31%

Benchmark Conversion rate if response time less than 1 hour

10% to 20%

Goal for Reply Rate on Email 1

40% to 50%

Goal for Click Rate on Email 1

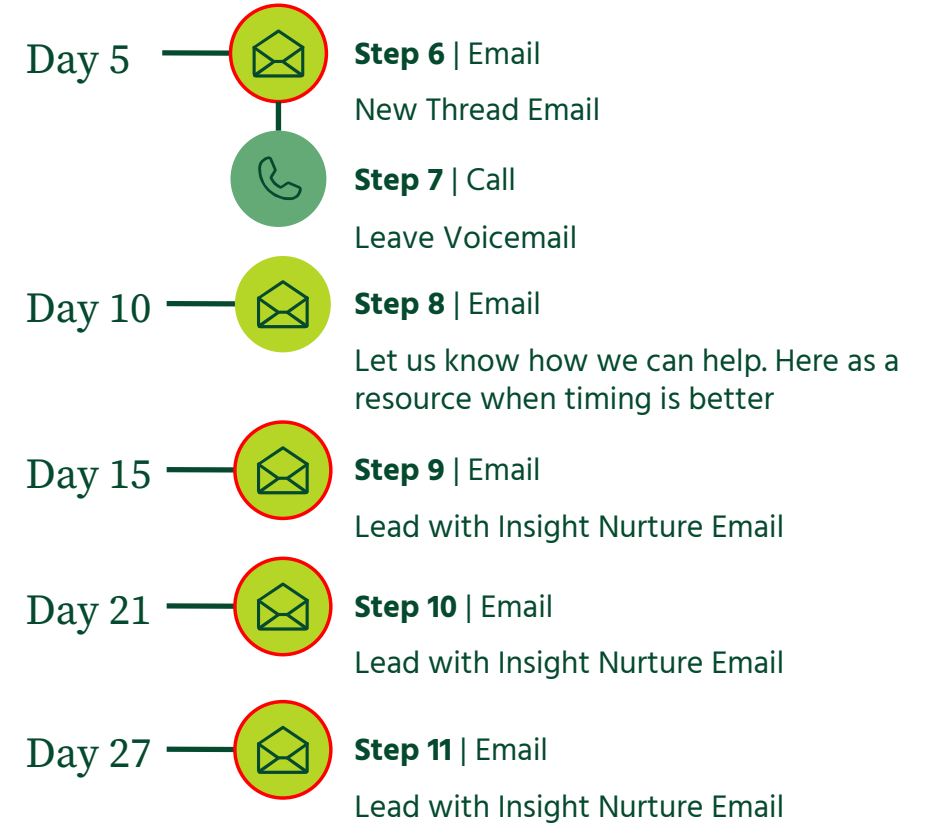
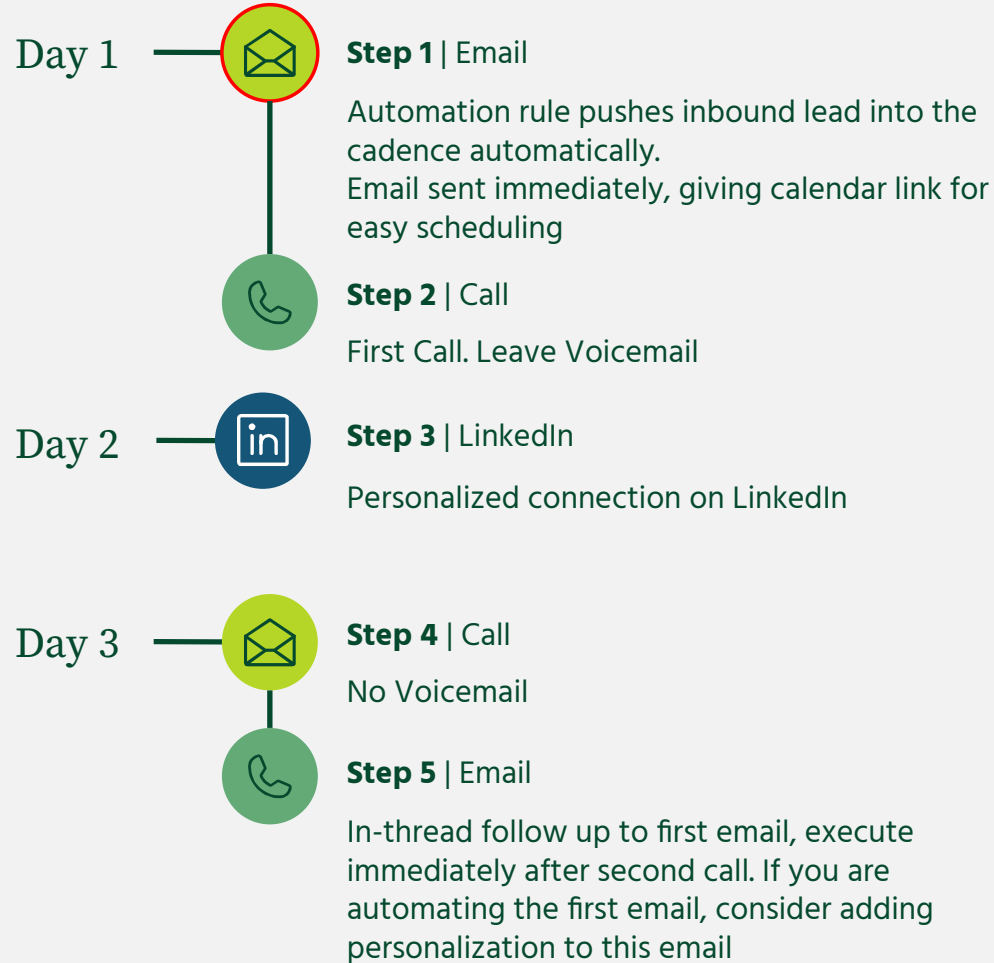


Leverage Hot Leads and a Call Now Cadence

[Back to Cadences](#)

Inbound Follow Up

11 Steps over 27 Business Days



Inbound Response Content Download

Continue to Deliver Value to Your Audience

Cadence Objectives

Give reps the chance to start a conversation with a lead who has engaged with Marketing content. The goal is to deliver value first, and hope it leads to a deeper conversation. Use this cadence if you've determined you want the follow up coming 1-1 from the Account Owner

Target

Content Download Leads

Tips & Tricks

- Use Automation Rules to trigger leads directly into this cadence
- Assign the leads to the rep who owns the account, so it can inform their overall account strategy
- This cadence is email only. If the prospect becomes a Hot Lead in Salesloft, the rep should call to engage from there
- Emails should be high on value related to original content, low on hard call to action

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM

AE

Exec

Benchmarks & Goals

11.5% to 12.3%

Conversion Rate of Hot Leads




Leverage Hot Leads and a Call Now Cadence


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Content Download

4 Steps over 16 Business Days

Day 1 —  **Step 1 | Email**
Give Related Content. Provide Calendar for Scheduling

Day 4 —  **Step 2 | Email**
In thread reply. Here's another related article

Day 9 —  **Step 3 | Email**
Have you implemented the content yet? Any Questions

Day 16 —  **Step 4 | Email**
Thanks again

Go-to Outbound Prospecting

Turn Cold Prospects into Opportunities

Cadence Objectives

Outbound Cadence built to support your teams general prospecting. Can be used as a template to support multiple verticals or personas. Goal is to schedule an initial meeting with a cold prospect.

Target

High Priority Decision Makers within your target accounts or territory. Use this cadence to connect with your buyer.

Tips & Tricks

- 20% Personalization of Email 1 leads to 2x increase in response rate
- Consider using Video in the 2nd or 3rd email step
- LinkedIn steps provide opportunity to get creative and engage over social
- Last "Other" step is a holding tank. Consider using Automation rules to send them straight into a Nurture Cadence
- Refer to our messaging guide for ideas on building a content library

Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

77% to 91%
Increase in response rate when using multiple channels



5% to 7%
Goal for Reply Rate on Email 1








20% to 30%
Goal for Open Rate

[Back to Cadences](#)

Go-to Outbound Prospecting

14 Steps over 26 Business Days

- Day 1** —  **Step 1 | Call**
First Call. Leave Voicemail
-  **Step 2 | Email**
First email. Personalize based on the research you've done on the prospect
- Day 2** —  **Step 3 | LinkedIn**
Connection request on LinkedIn
- Day 3** —  **Step 4 | Call**
No voicemail, follow up with an email
-  **Step 5 | Email**
In-thread follow up to first email
- Day 6** —  **Step 6 | Email**
New email thread. Consider Vidyard for this step
- Day 7** —  **Step 7 | Call**
Leave VM referring back to Video

- Day 9** —  **Step 8 | LinkedIn**
Engage on LinkedIn where possible. Consider InMail. Like, Comment, Share. At the very least, view their profile.
- Day 11** —  **Step 9 | Call**
Leave Voicemail
-  **Step 10 | Email**
Fourth Email. Potentially Automate
- Day 16** —  **Step 11 | Email**
Fifth Email. Potentially Automate
- Day 21** —  **Step 12 | Call**
Leave Voicemail
- Day 25** —  **Step 13 | Email**
Final Email. Potentially Automate
- Day 26** —  **Step 14 | Other**
Where should this person go from here? Anything else on social you can do to connect? Move to Nurture cadence?

High Volume Outbound Prospecting

Scaled Prospecting with an Emphasis on Speed and Calls

Cadence Objectives

Outbound Cadence built for teams with a large ICP or for prospects where it doesn't make sense to personalize every message. Goal is to schedule an initial meeting with a cold prospect.

Target

Lower Priority Decision Makers within your target accounts or territory. Ensure that messaging is highly specific to the problems you are solving.

Tips & Tricks

- First email should be built to personalize, but fine to send without it
- Research and data clean up should be done during initial call step
- Most emails in this cadence are automated. A/B Test and tweak quarterly

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM

AE

Exec

Benchmarks & Goals

77% to 91%

Increase in response rate when using multiple channels

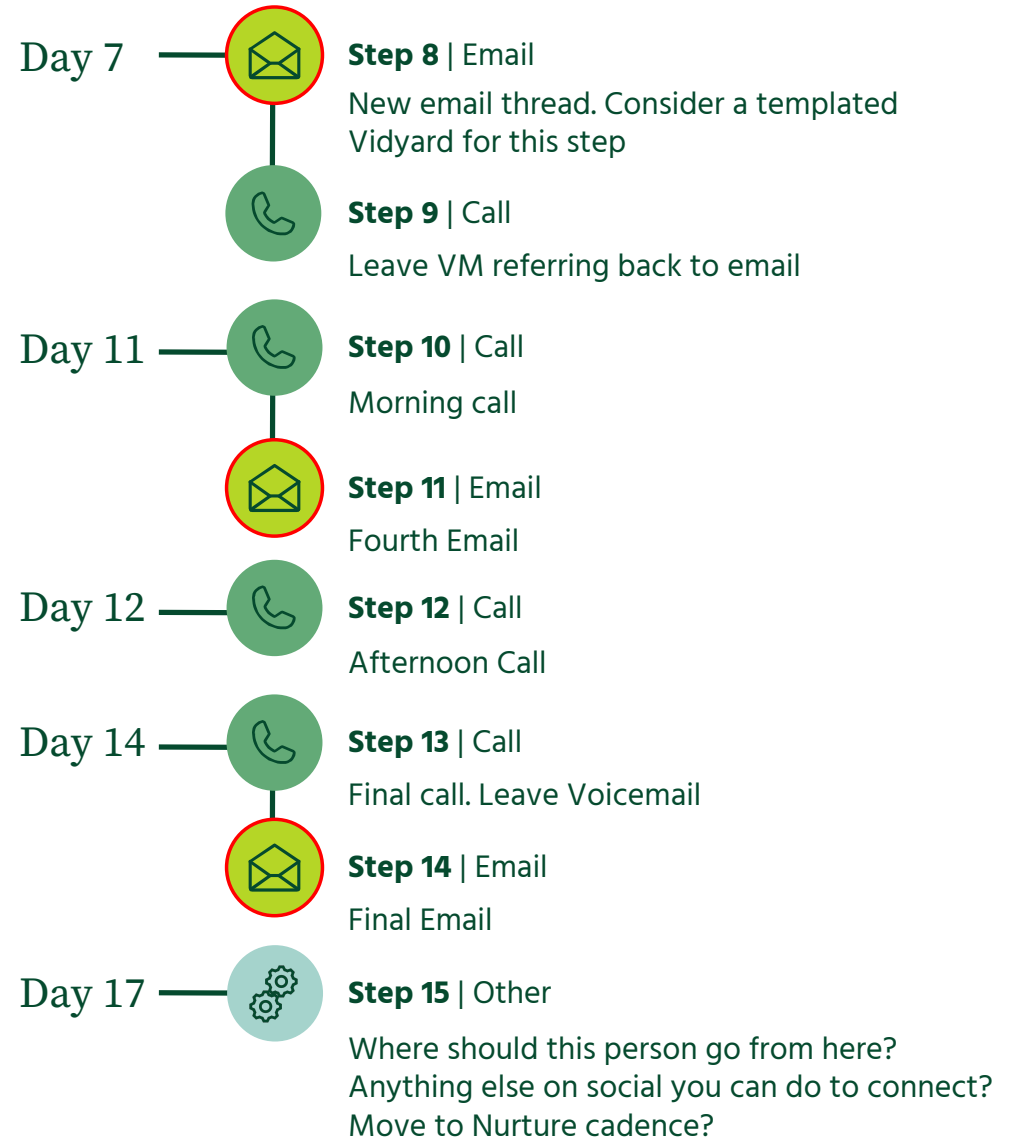
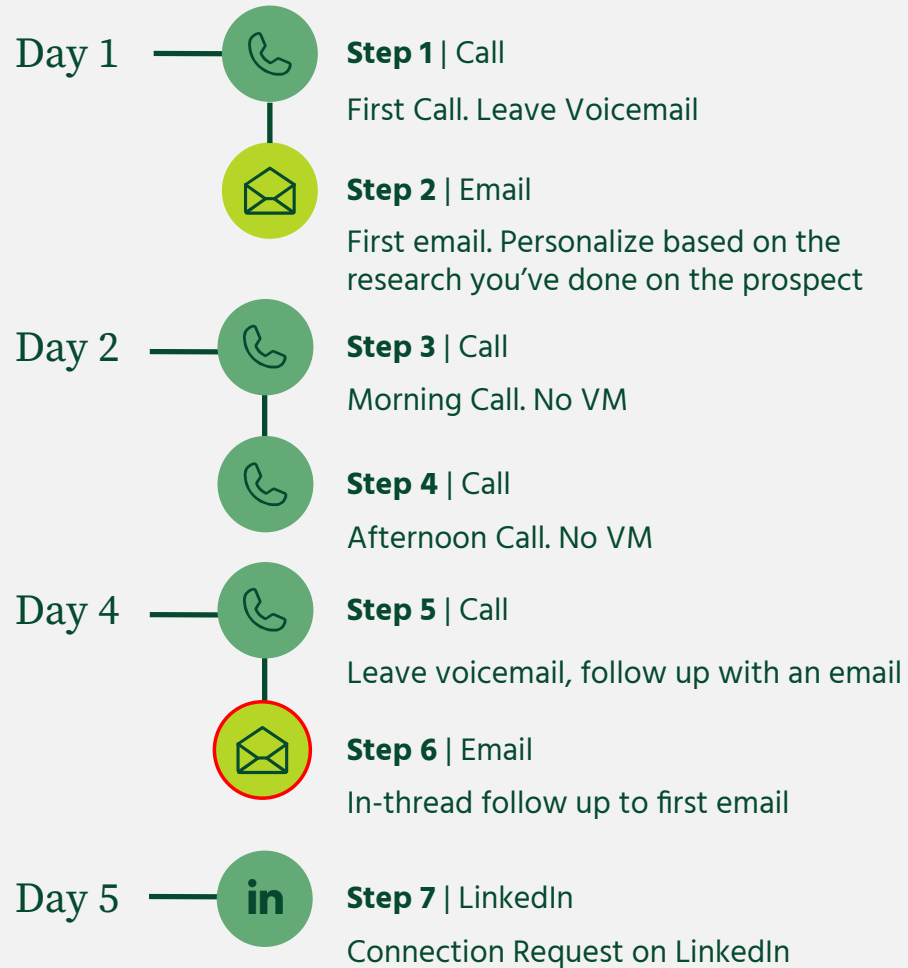
5% to 10%

Goal for Phone Connection Rate

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High Volume Outbound Prospecting

15 Steps over 14 Business Days



Full Cycle Outbound Prospecting

Fill Your Pipe and Spend More
Time Closing

Cadence Objectives

Built for full cycle reps who are focused on closing deals. Gaps are extended between steps, and the cadence runs over the course of a month. Goal is to build credibility and schedule an initial meeting.

Target

High Priority Decision Makers within your target accounts or territory. Use this cadence to connect with your buyer.

Tips & Tricks

- First email should be heavily personalized to the individual prospect
- Consider using Video in the 2nd or 3rd email step
- Leverage LinkedIn to like, comment, or generally engage with the prospect

Engagement Channels

 Email	 Social	 Text
 Phone	 Video	 Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

77% to 91%

Increase in response rate when using multiple channels instead of single

5% to 7%

Goal for Reply Rate on Email 1

12.5%

Increase in Response Rate with Video

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Full Cycle Outbound Prospecting

13 Steps over 26 Business Days



Close Deals

Meeting Setup and Follow Up

- [Meeting Confirmation](#)
- [Deal Progression](#)

Closed Lost or Gone Dark

- [Closed/Lost](#)

	Close deals	
	Meeting Setup and Follow Up	Closed Lost or Gone Dark
Marketing		
SDR	✓	✓
AE	✓	✓
AM/CSM		
Exec		

Meeting Confirmation

You Worked Hard for That Meeting.
Make Sure it Happens

Cadence Objectives

Both SDRs and AEs can take steps to improve show rates on meetings that they set. The goal of this Cadence is to ensure that the meeting happens.

Target

Prospects who you've scheduled a meeting with

Tips & Tricks

- You should put someone in this cadence as soon as you schedule the meeting
- After step one, you'll need to align due dates of the next steps based on the meeting date
- Call step is optional

Engagement Channels

 Email	 Social	 Text
 Phone	 Video	 Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

Reduce No-show Rates from
40% to 10%

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Meeting Confirmation

4 Steps from Meeting Set to Meeting Completed



Step 1 | Email

Confirm Meeting after scheduling and send calendar invite



Step 2 | Email

Send Agenda the day before the call



Step 3 | Call

Optional call day of meeting



Step 4 | Email

Day of meeting confirmation email

Closed/Lost Nurture

Can't win them all (right now)

Cadence Objectives

In sales, even the best reps can bat .250 - How do you stay engaged with the deals you don't win? This cadence is meant to keep you engaged when a prospect goes with a competitor or delays a decision 6-12 months.

Target

Prospects from deals you have lost

Tips & Tricks

- First Email is your chance to thank them for their consideration, and promise to stay in touch
- Cadence is built to last 6 months, with an email once a month
- Use LinkedIn to stay engaged
- Consider sharing content that is not built by you. Share blog posts from other experts and pull out quick takeaways

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM

AE

Exec

Benchmarks & Goals

5% to 10%

Goal for Click Rate to show your content is resonating. A/B Test your emails






15% to 25%

Goal for % of opportunities revived

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Closed/Lost Nurture

10 Steps over 102 Business days

- Day 2 —  **Step 1** | Email
Thank them for their evaluation
- Day 23 —  **Step 2** | Email
It's been about a month. How are things going?
- Day 35 —  **Step 3** | LinkedIn
Engage on LinkedIn
- Day 45 —  **Step 4** | Email
Value Add Content
- Day 59 —  **Step 5** | LinkedIn
Engage on LinkedIn

- Day 62 —  **Step 6** | Email
Value Add Content
- Day 75 —  **Step 7** | LinkedIn
Engage on LinkedIn
- Day 86 —  **Step 8** | Email
Value Add Content
- Day 101 —  **Step 9** | Email
Is timing better now?
- Day 102 —  **Step 10** | Other
Where should this person go from here?

Deal Progression

Make sure you get next steps

Cadence Objectives

The goal of this cadence is to ensure you moves opps to the next stage in the deal cycle. The timing of the steps is less important, the goal is that we stay in front of them.

Target

Prospects after an initial meeting

Tips & Tricks

- Email 1 is your recap email
- Lengthen the cadence and extend spacing between steps to align with your deal cycle.
- Use other steps as a reminder to engage. Knowing the deal, what makes the most sense? Call? Email? LinkedIn?
- Create and maintain a bank of high value, low ask email templates for closers to use and position themselves as experts when reaching out throughout the cycle

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM




AE





Exec

[Back to Cadences](#)

Deal Progression


Adjust to fit typical deal cycle
Short Cycle Example



- Day 1 —  **Step 1 | Email**
Send Recap and lay out next steps
- Day 1 —  **Step 2 | LinkedIn**
Connect on LinkedIn
- Day 3 —  **Step 3 | Other**
How do we move the deal forward?
- Day 5 —  **Step 4 | Email**
Value Add Content

- Day 7 —  **Step 5 | LinkedIn**
Engage with content on LinkedIn if they have shared anything recently
- Day 9 —  **Step 6 | Other**
How do we move the deal forward?
- Day 13 —  **Step 7 | Other**
How do we move the deal forward?
- Day 18 —  **Step 8 | Other**
How do we move the deal forward?

Deal Progression

Adjust to fit typical deal cycle
4 Month Cycle Example

- Day 1 —  **Step 1 | Email**
Send Recap and lay out next steps
- Day 1 —  **Step 2 | LinkedIn**
Connect on LinkedIn
- Day 10 —  **Step 3 | Other**
How do we move the deal forward?
- Day 11 —  **Step 4 | Email**
Value Add Content

- Day 20 —  **Step 5 | LinkedIn**
Engage with content on LinkedIn if they have shared anything recently
- Day 31 —  **Step 6 | Other**
How do we move the deal forward?
- Day 40 —  **Step 7 | Other**
How do we move the deal forward?
- Day 55 —  **Step 8 | Other**
How do we move the deal forward?

Drive Success

Drive Adoption and Usage

- [Journey Cadence](#)
- [Optimize](#)
- [High NPS](#)

Engage At Risk Accounts

- [Pilot Engagement](#)
- [Proactive Action](#)

Exec / Customer Alignment

- [Leader Cadence](#)

S.	Drive Success <i>Non-Commercial</i>		
	Drive Adoption & Usage	Engage At-Risk Accounts	Exec Customer Alignment
Marketing			
SDR			
AE			
AM/CSM	✓	✓	
Exec			✓

Journey Cadence

Educate Your Customers Throughout the Year

Cadence Objectives

When a handoff is made from implementation to Success, this cadence kicks off to make sure that CS is providing customers with the latest information they need to be successful.

Target

Main POCs from customers in your book of business

Tips & Tricks

- Cadence is heavily automated so no one slips through the cracks
- Use short burst intervention cadences to supplement, triggered at the other step "checkpoints:
- Other steps serve as a reminder to review the account and take action where needed
- Cadence lasts 258 business days, which translates to a full calendar year

Engagement Channels

 Email	 Social	 Text
---	--	--

 Phone	 Video	 Direct Mail
---	---	---

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

Audit/Update Content on a

MONTHLY basis

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Year Long Journey Cadence

19 Steps over 258 Business Days



Optimize

Find and Communicate Areas for Improvement

Cadence Objectives

Deep dive into customer’s utilization of the platform and opportunity to highlight areas of improvement.

Target

Customers who are 6 months into the partnership

Tips & Tricks

- Content should be heavily personalized to the customer
- Using a Sending Platform like Sendoso or Alyce makes it easy to send gifts to customers
- This Cadence helps CSMs stay on track with the steps they need to take at 6 months into the relationship

Engagement Channels

Email	Social	Text
Phone	Video	Gifts

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

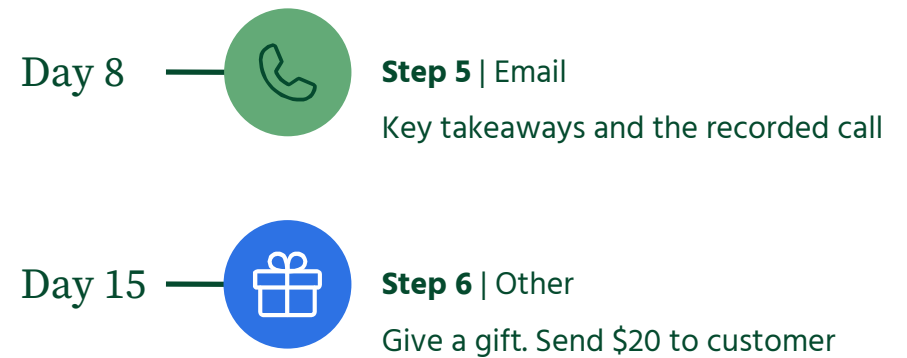
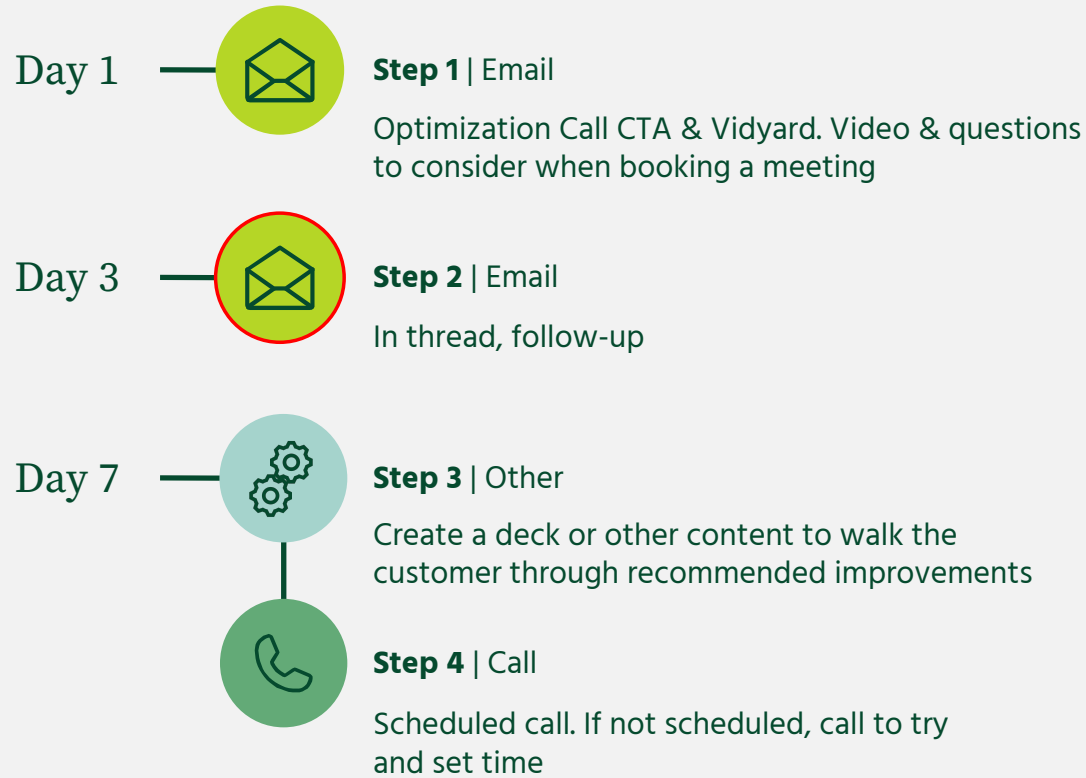
11%

Increase in engagement with gifts

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Optimize

6 Steps over 15 Business days



High NPS

Leverage Your Advocates

Cadence Objectives

Determine what led to the high score and thank them for being an advocate.

Target

Users that have given High NPS Scores

Tips & Tricks

- See if they would be willing to provide a review on G2Crowd or TrustRadius
- Use Sending Platform to thank them with a gift
- Trigger the cadence with an Automation Rule

Engagement Channels

 Email	 Social	 Text
 Phone	 Video	 Gift

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

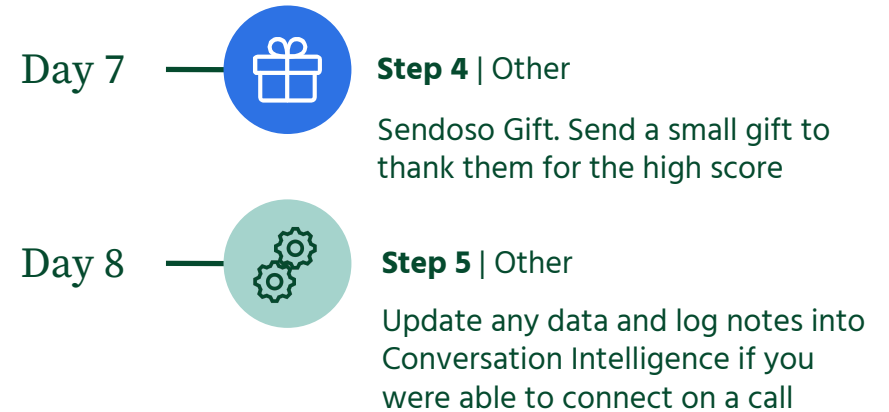
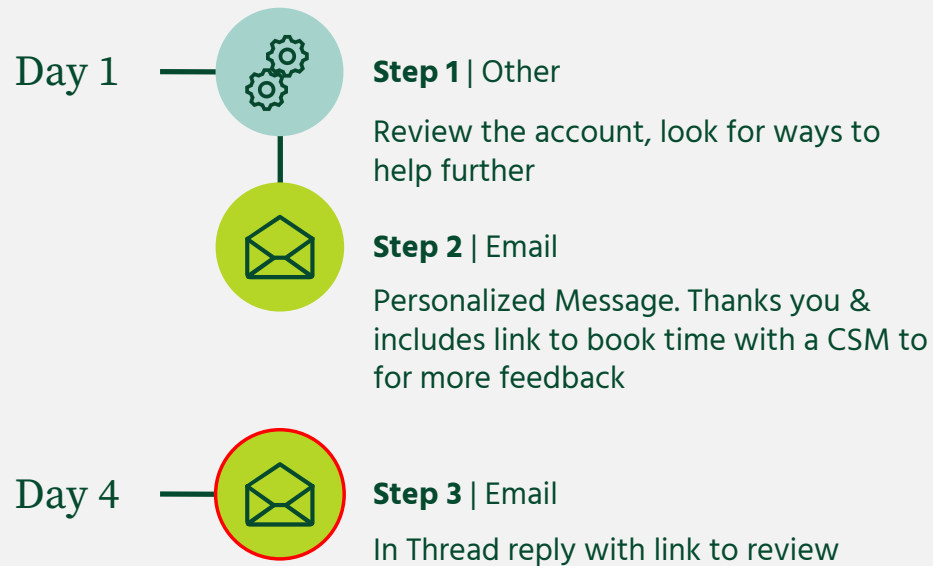
9 or Higher

Score that triggers the cadence

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High NPS

5 Steps over 8 Business days



Pilot Engagement

Driving Adoption is Critical During A Pilot

Cadence Objectives

The goal of this cadence is to convert 1 Month Pilots into a paying customer. It's build to drive engagement and adoption.

Target

Pilot Users

Tips & Tricks

- This Cadence assumes that you've done the work up front and have a clear schedule with the customer for the next month
- It is critical that steps are completed on time
- Relationship with main POC is critical, as they will need to forward emails to the team
- Use the weekly emails to gamify adoption. Shout out great users, and consider using a sending platform for gifts during the pilot
- Ask our team for the 2 and 3 month variations to better suit your sales cycle

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM

AE

Exec

Benchmarks & Goals

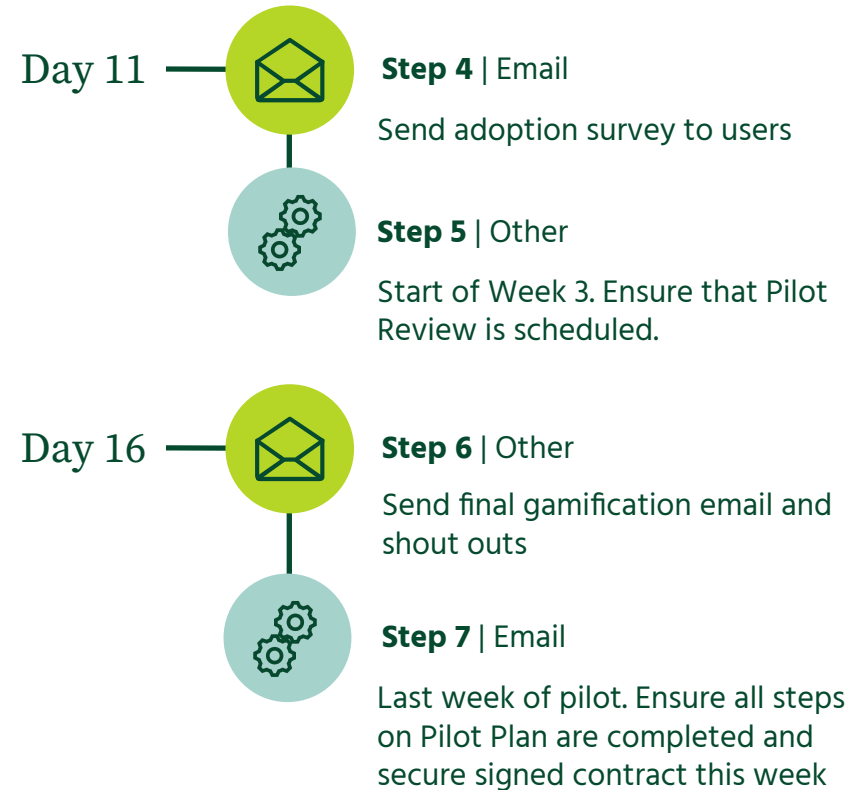
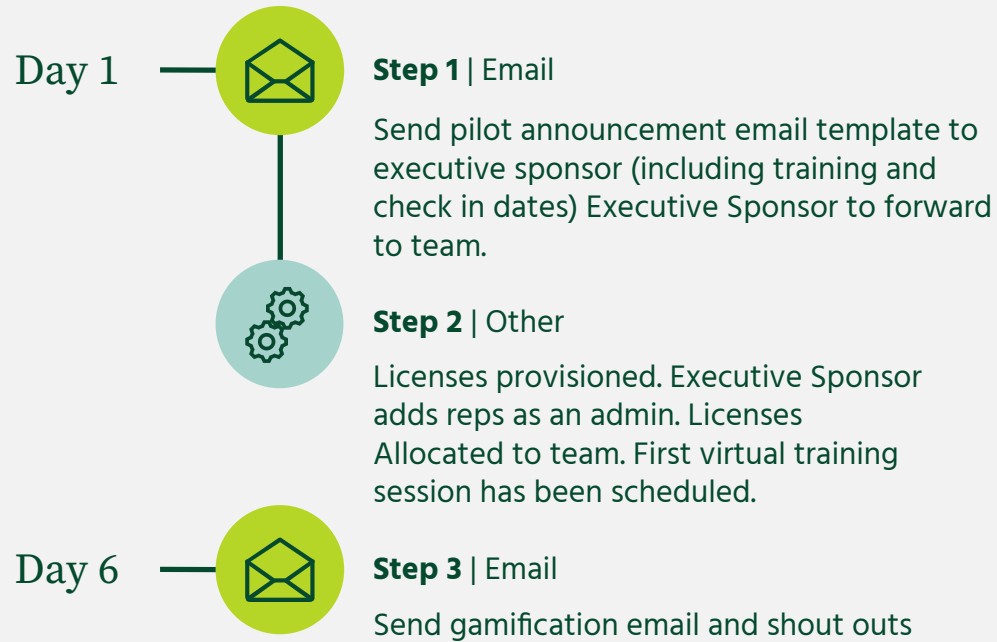
1 Month

Pilot Length in this Example

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Pilot Engagement

7 Steps over 16 Business days



Proactive Action

Identify When Teams are Struggling and Give Them a Hand

Cadence Objectives

This is a short burst intervention cadence, built to be used proactively by CSMs when they recognize an issue like low usage or other yellow flags

Target

Teams that need a helping hand

Tips & Tricks

- Use Video to personalize the content and show that you're here to help
- This is a quick cadence meant to be used to respond swiftly when a problem is recognized. Create a library of these cadences and have them at your disposal to deploy at any point during the Journey Cadence

Engagement Channels

 Email	 Social	 Text
 Phone	 Video	 Mail

Complexity Level

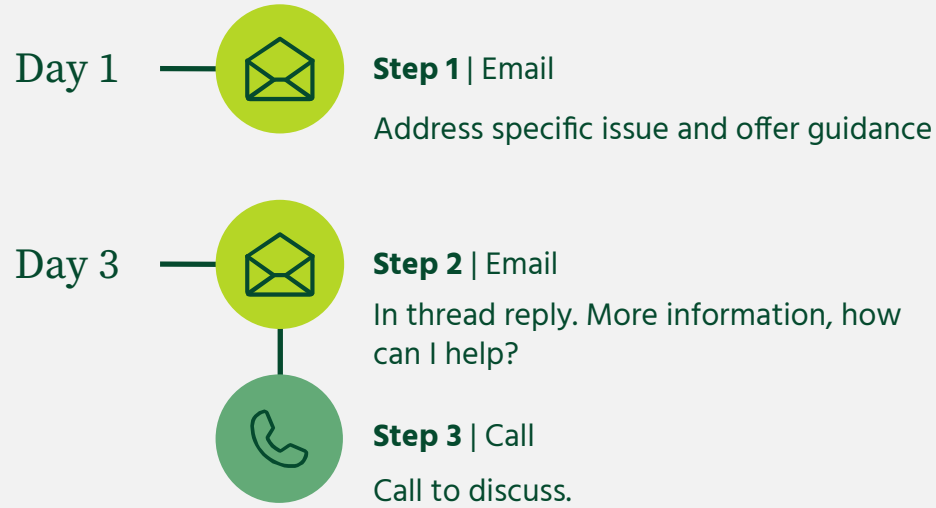
Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Proactive Action

6 Steps over 9 Business Days Structure can be replicated for multiple use cases



Leader Cadence

Build Strong Relationships

Cadence Objectives

For Executive Leadership to maintain relationships with other leaders after an initial meeting with a customer

Target

Executive Leadership within your customer base

Tips & Tricks

- Connect on LinkedIn and check daily for promotions, new roles, birthdays
- Send personal videos when these types of events occur, as one off emails in parallel with this cadence

Engagement Channels

 Email	 Social	 Text
 Phone	 Video	 Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

30+


Quarterly Goal of Customers In Cadence


[Back to Cadences](#)

Leader Cadence

3 Steps over 86 Business days

Day 1 —  **Step 1 | Email**
Send Video Recap of Meeting

Day 26 —  **Step 2 | LinkedIn Research**
Check out their LinkedIn. Is there anything you can like, share, or comment on that they've engaged with recently?

Day 86 —  **Step 3 | Email**
Email to check in and see how things have gone since meeting

Renew and Expand

Upsell & Cross-Sell

- [New Rep Intro](#)
- [Cross Sell](#)

Renewal

- [Renewal: 6 Months Out](#)

S.	Renew and Expand	
	Upsell & Cross-Sell	Renewal
Marketing		
SDR		
AE	✓	
AM/CSM	✓	✓
Exec		

New Rep Intro

Set Yourself Up as a Resource for Your Customers

Cadence Objectives

Territory changes happen. Sometimes you come in new and take over someone's book. This Cadence is built to help you introduce yourself and position yourself as a trusted advisor. The goal is that this leads to a new opportunity.

Target

Main POC's and Other Decision Makers within your assigned book of current customers

Tips & Tricks

- First email should include actionable insights about the team's success
- Leverage LinkedIn to build a relationship throughout the cadence
- Content should be value add but also highlighting products that the team may not be taking advantage of

Engagement Channels



Email



Social



Text



Phone



Video



Direct Mail

Complexity Level

Easy to Implement

Takes Time

Let Us Help You

Role

Mktg

CSM

SDR

AM

AE

Exec

Benchmarks & Goals

25% to 30%

Response Rate Goal on Email 1

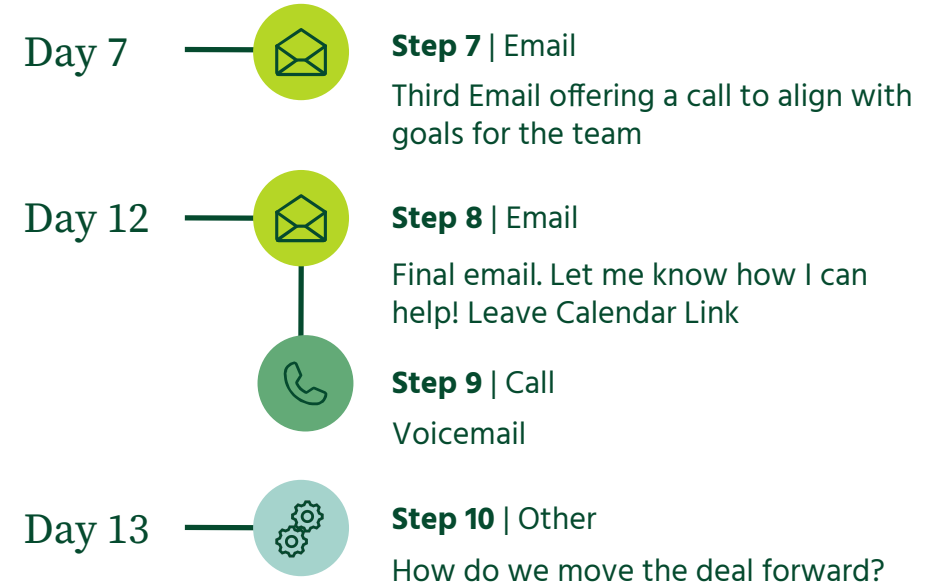
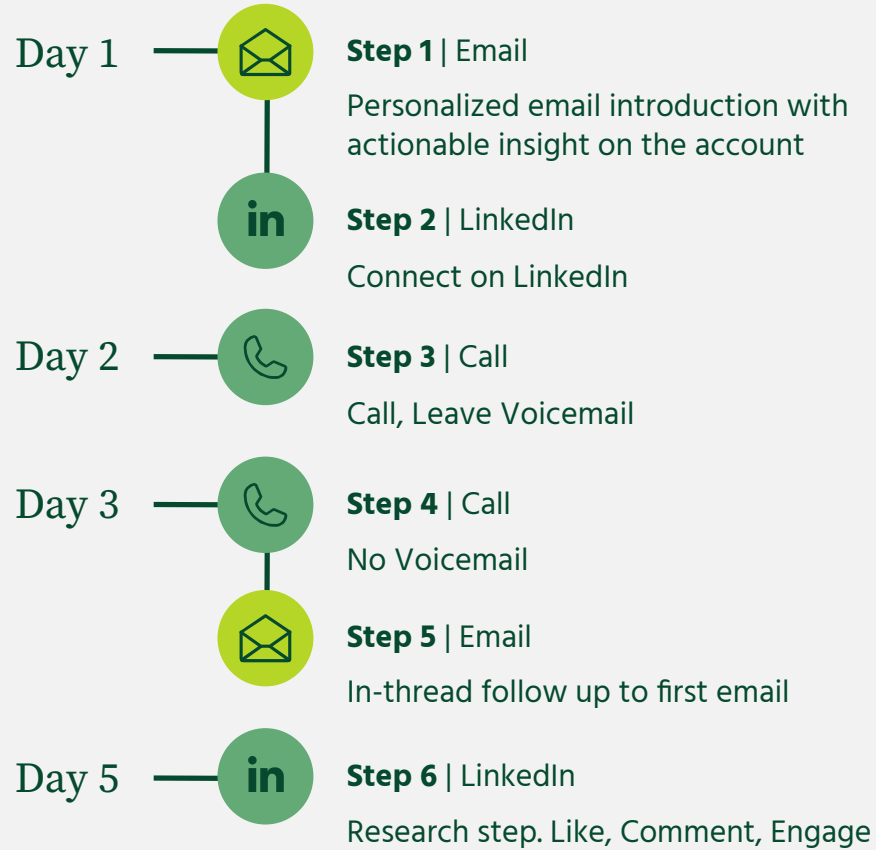
10% to 15%

Goal for Conversion Rate into Opportunity

[Back to Cadences](#)

New Rep Intro

10 Steps over 13 Business Days



Cross Sell

Introduce New Products and Expand to New Teams

Cadence Objectives

In each of your accounts, is every person in the company using your product that could be? The goal of this cadence is to connect with leaders outside of your main POC and show the value that other teams have already gotten from your product.

Target

Leaders of new teams within an account, Executive leaders, and Leaders who are not using all of you company's products

Tips & Tricks

- Create a case study of sorts that shows how other teams within their organization are benefiting from your product
- Leverage LinkedIn to build a relationship throughout the cadence
- Use Video if you can to show real world examples inside your product

Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

12.5%

Increase in Response Rate with Video

10% to 15%

Goal for Conversion Rate into Opportunity

[Back to Cadences](#)

Cross Sell

10 Steps over 13 Business Days



Renewal: 6 Months Out

Start Early to Secure Renewal

Cadence Objectives

Alert your customers of their upcoming renewal, and identify blockers as early as possible.

Target

Customers with an upcoming renewal

Tips & Tricks

- There is adequate time between touches in this cadence to remain highly personalized with the messages you send
- Other steps serve as reminders of where you are in the process and how much time is left to secure Renewal
- Use Renewal Dates in Salesforce to trigger this cadence automatically with an automation rule

Engagement Channels

 Email	 Social	 Text
 Phone	 Video	 Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals


6 MONTHS

Time until Renewal

[Back to Cadences](#)

Renewal: 6 Months Out

15 Steps over 129 Business days

- Day 1** —  **Step 1 | Email**
Ask to schedule discovery call with renewal being almost 6 months out
-  **Step 2 | LinkedIn**
Light social touch. View on LinkedIn, like or comment where it makes sense
- Day 2** —  **Step 3 | Call**
Call, Leave Voicemail
- Day 4** —  **Step 4 | Call**
No Voicemail
-  **Step 5 | Email**
In-thread follow up email, offering calendar for scheduling an intro call
- Day 5** —  **Step 6 | Other**
6 Months from Renewal. Were you able to schedule Discovery and confirm next steps? Kickoff any intervention needed
- Day 50** —  **Step 7 | Other**
Almost 3 months out from Renewal. Make Final Preparations
- Day 59** —  **Step 8 | Email**
Send email to confirm timeline and alignment, Give access to calendar to schedule call if needed

- Day 80** —  **Step 9 | Other**
Almost 2 months out from Renewal. Make Final Preparations
- Day 81** —  **Step 10 | Email**
Send over pricing proposal/contract. Schedule time to review
-  **Step 11 | Call**
Call, Leave Voicemail to schedule time
- Day 82** —  **Step 12 | Call**
No Voicemail
-  **Step 13 | Email**
In-thread follow up email, offering calendar for scheduling an intro call
- Day 107** —  **Step 14 | Other**
30 Days out. Is Renewal Secured?
- Day 129** —  **Step 15 | Email**
Thank You email

Bonus: Hot Leads Cadence



Hot Leads Cadence



Faster Conversion

Connect with your buyers at the right time by listening to and immediately acting on what your prospects aren't saying. Catch them in the right mindset so you're not interrupting their day, you're improving it.



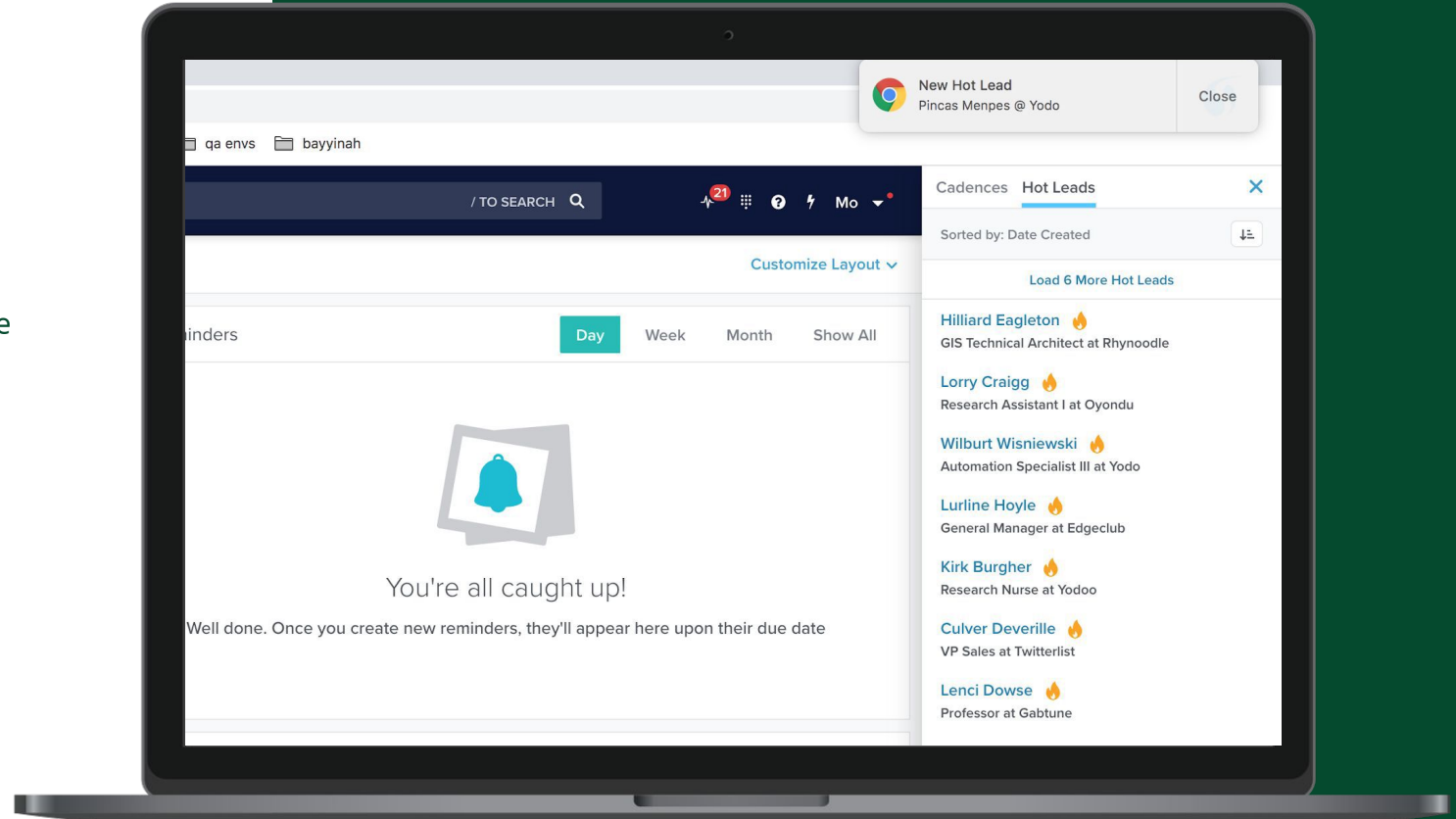
3 Step Cadence

Call, Social, Call
If we don't connect, they flow right back into their normal cadence
Pro tip: No Stage Change



Used by All Teams

With less calls in nurture cadences, this helps to make sure reps are using all channels at the right time



Hot Leads Call Now

Surface Highest Engaged Prospects to your Sellers

Cadence Objectives

In many of our more passive Nurture cadences, we let automation take over with very few phone calls. This cadence is meant to be triggered and ran in the background, surfacing immediate calls to reps when a prospect crosses the threshold you define

Target

Salesloft Hot Leads

Tips & Tricks

- Tailor your formula for hot leads based on feedback from the team, using the inputs of email opens, clicks, and website views
- Use an Automation Rule to send Hot Leads directly into this Cadence
- When complete, these contacts will continue down whatever track they are on. This cadence is meant to run in parallel with their current cadence

Engagement Channels

Email	Social	Text
Phone	Video	Direct Mail

Complexity Level

Easy to Implement
Takes Time
Let Us Help You

Role

Mktg	CSM
SDR	AM
AE	Exec

Benchmarks & Goals

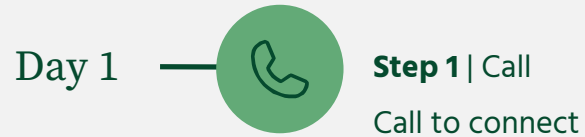
7%

Conversion Rate Increase of Hot Leads vs baseline

[Back to Cadences](#)

Hot Leads

3 Steps over 2 Business Days



Thank you!