

Gartner.

Licensed for Distribution

Quick Answer: Effective Strategies for Virtual Prospecting

Published 21 May 2021 - ID G00749861 - 3 min read

By [Dan Gottlieb](#)Initiatives: [Sales Execution and Demand Generation](#)

Effective prospecting — no longer an art form — can be executed repeatedly and at scale. With the support of data and technology, sellers consistently generate healthy pipelines by manufacturing relevant messages, delivered to the appropriate contacts with suitable timing, across multiple channels.

Quick Answer

What are effective ways to prospect virtually?

- **Use data to select and prioritize accounts:** Use combinations of intent, account and engagement data to select accounts for prospecting
- **Use multithreading to engage multiple buyers at once:** Methodically engage entry point and decision-making personas.
- **Develop semi customized messages:** Tailor 10% to 20% of messages to research, persona, and account insights and prewritten snippets.
- **Engage via multiple channels:** Develop touch patterns for driving 12 to 24 touches over two to four weeks across three or more channels.
- **Nurture buyers with reengagement plays:** Manage a progressively evolving list of warm buyers.

More Detail

Outbound virtual prospecting is an essential channel for pipeline generation, but 70% of B2B sellers cite “gaining access to stakeholder virtually” as their top challenge. ¹ Outbound prospecting fundamentals (the delivery of relevant messages to the appropriate contacts at a suitable time) are more realistic for sellers to execute repeatedly when supported with data and technology. Implementing the following outbound prospecting best practices can help scale early pipeline generation:

1. Use data to select and prioritize accounts — To increase meeting and opportunity conversion rates, leverage the available data sources listed in Table 1 to target accounts with a higher likelihood to engage. Marketing and operations leaders can use this data to create dashboard lists of accounts that meet these criteria to simplify account selection for sellers. The result of this exercise are logically organized lists of accounts for sellers to select for prospecting.

Table 1: Prioritize Accounts Based on Ability to Engage

Data Source	Description	Example
Intent data	Insights from internet content consumption (e.g., keywords)	<ul style="list-style-type: none"> Target account searching a competitor with no sales activity for more than 45 days
Engagement data	Insights from marketing and past sales opportunities (e.g., number of leads engaged with marketing materials or visiting the website)	<ul style="list-style-type: none"> Target account engaging in content on website with no sales activity for more than 30 days List of good-fit accounts with more than five warm marketing leads

Account triggers	Triggers from accounts that fit the ideal customer profile criteria (e.g., firmographics, technographic, environmental data points)	<ul style="list-style-type: none"> ■ Target account entering a new market via M&A ■ Previous customer started a new role at a target account ■ Prospect shared relevant post on LinkedIn
------------------	---	---

Source: Gartner

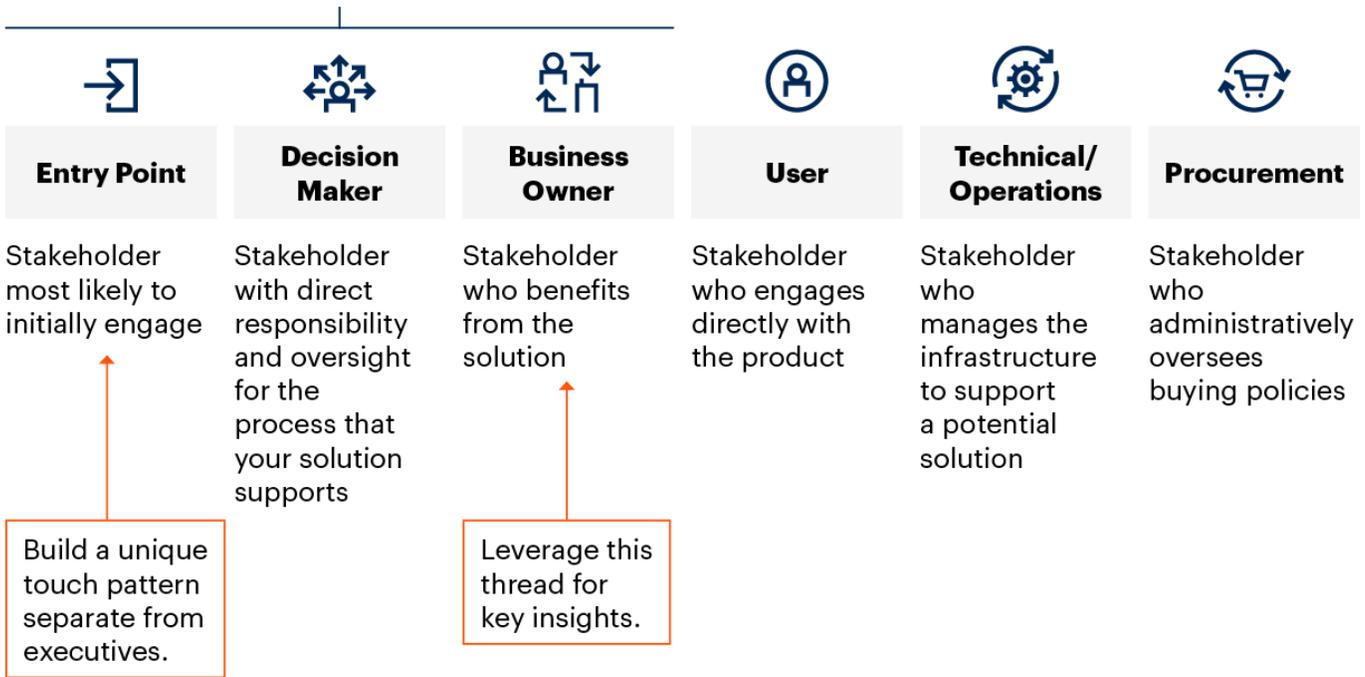
2. Multithread with the buying group – Guide sellers on when and how to engage three to six different buyer roles with unique touch patterns, and focus sellers on the threads most consistently involved in the early buying process. Figure 1 offers insight into each thread. Identifying the entry point and building a unique touch pattern for each thread leads to more consistent prospecting. Effective prospecting is all about finding the entry point mobilizer. Mobilizers excel at rallying their organization around new ideas. Business owners typically benefit from your solution and are part of the buying group; they're neither the owner of a process or the decision maker, but they provide valuable insight into the key initiatives your product or solution may support.

Figure 1: Multithreaded Prospecting



Multithreaded Prospecting

Focus on these three threads when prospecting.



Source: Gartner
749861_C

Gartner

3. **Scale messaging with semi customized templates** – For some industries, email is a cornerstone of prospecting. To generate relevant messaging, guide sellers with checklists to source three to five account and buyer insights, then to edit a semi customized message for a unique persona. These scripts or messages can serve as the foundation for messaging across all engagement channels, including video, social and direct mail. Follow the guidance in Figure 2 to scale messaging templates.

Figure 2: Semicustom Prospecting Email Templates



Semicustom Prospecting Email Templates

Limit emails to three paragraphs of one or two sentences each.

Subject Line
RE: <INSERT: Key Initiative> With <Your Company>

Create Context
It looks like you're <CUSTOMIZE: relevant observation from research>. How are you addressing <INSERT: key initiatives or tactical challenges>?

Convey Value
We work with similar companies like <INSERT: value prop or use case story>.

Deliver Offer
I'd love to tell you a couple more stories like this one. Would that interest you?

Limit subject lines to five words related to your email content.

Personalizing 10% to 20% of an email message doubles reply rates.

Provide prewritten snippets of key initiatives, tactical challenges and value propositions by persona, use case or industry.

Use soft calls to action focused on starting a conversation.

Source: Gartner
749861_C

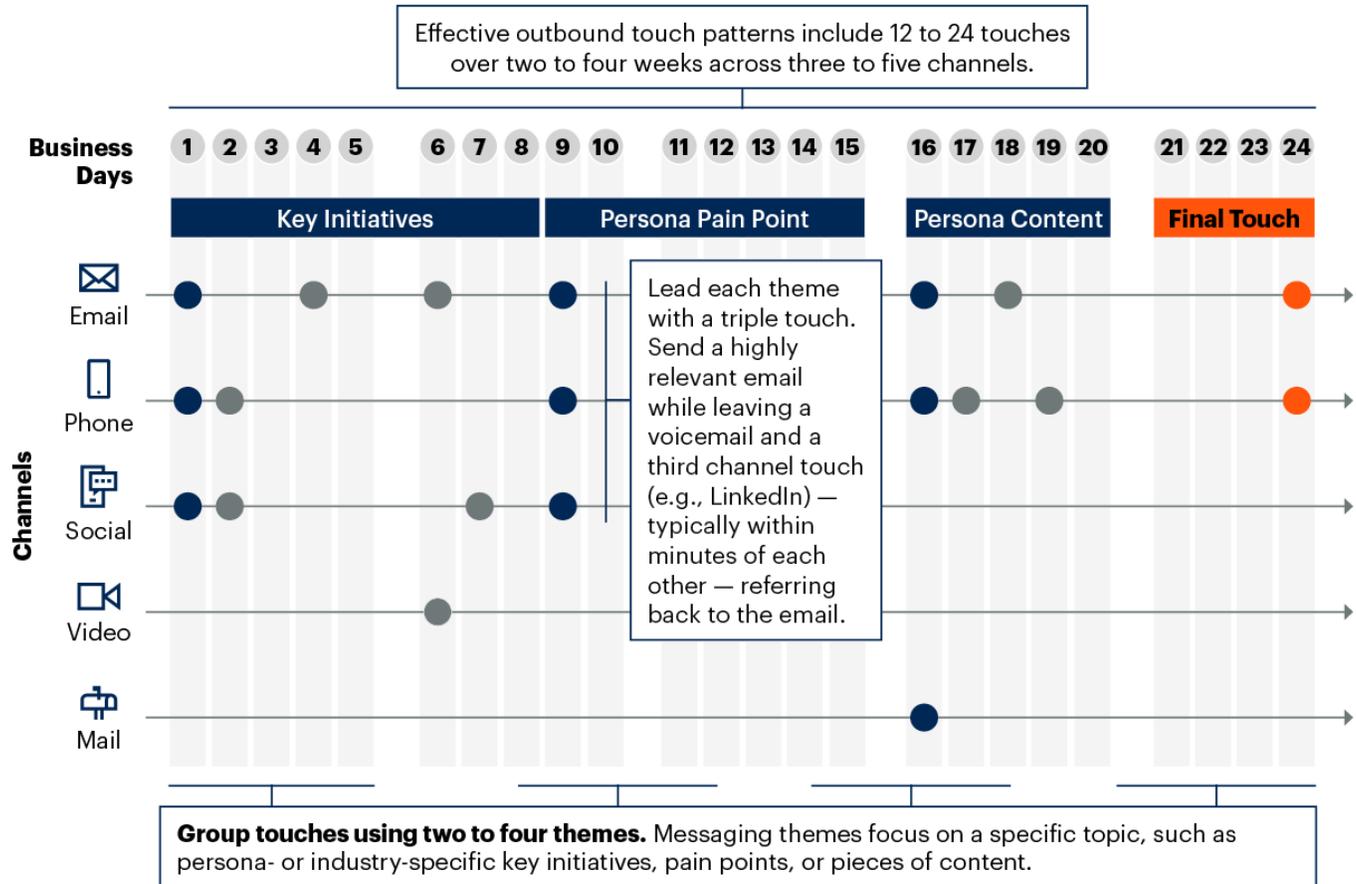
Gartner

4. Engage with multichannel touch patterns – Ninety-two percent of sales development teams use at least three channels for prospecting – phone, email and social. ² Touch patterns are managed through sales engagement technology, where a touch pattern can be programmed to help a seller manage and prioritize a high volume of concurrent touch patterns at a time. Follow the guidance in Figure 3 to design multichannel touch pattern prospecting.

Figure 3: Multichannel Touch Pattern for Outbound Prospecting



Multichannel Touch Pattern for Outbound Prospecting



Source: Gartner
749861_C

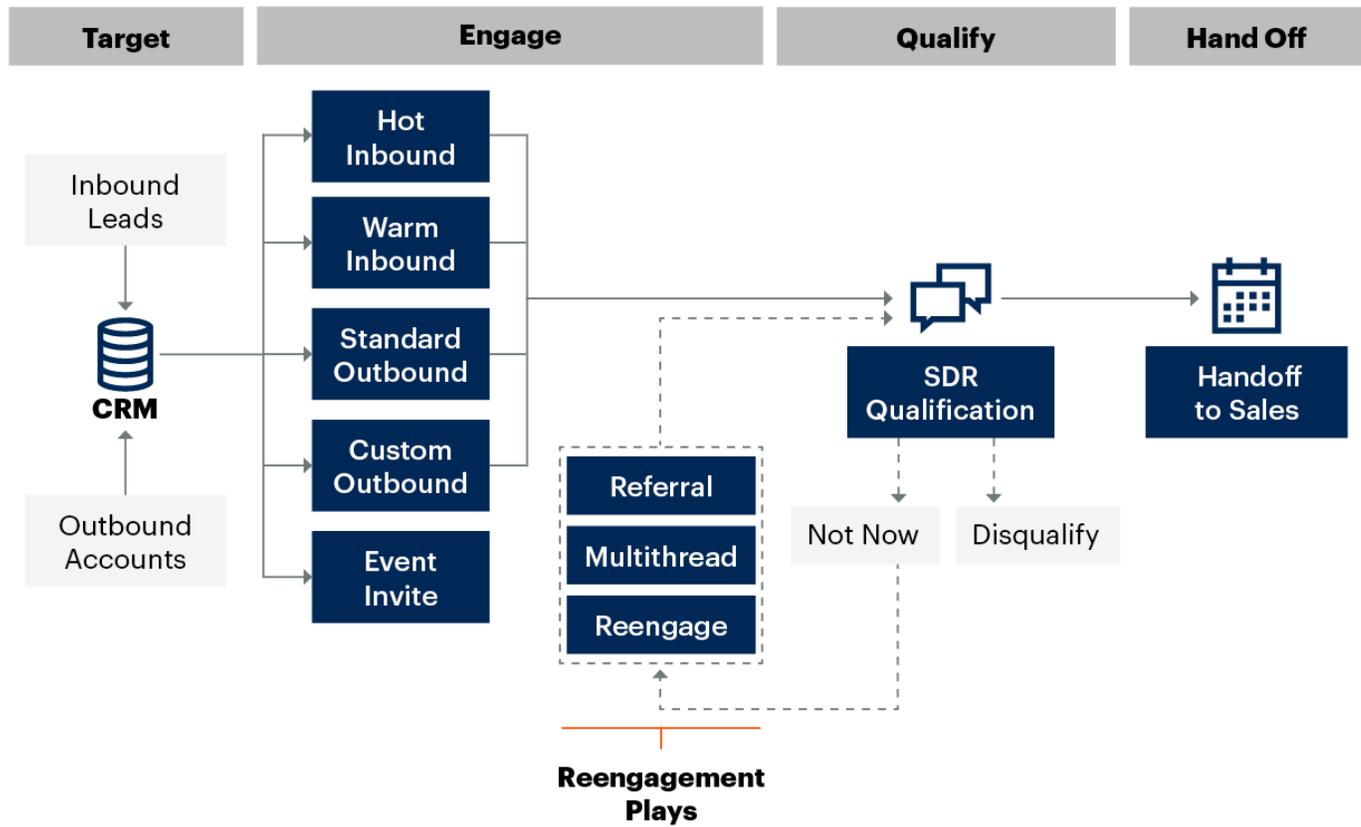


5. Nurture buyers with reengagement plays – After initial conversations with prospects, reengagement plays enable sellers to nurture additional prospects at good-fit accounts. Reengagement plays are effective at generating opportunities because a seller can systematically leverage insights gained from previous interactions. Figure 4 depicts the role of reengagement plays in a sales engagement playbook.

Figure 4: Prospecting Plays



Prospecting Plays



Source: Gartner
749861_C



Recommended by the Authors

[Selecting Accounts for Prospecting Programs](#)

[Touch Pattern Dashboard for Sales Development Representatives](#)

[Boost the SDR Communication Using the Triple Touch Pattern](#)

[Touch Pattern Play: A Tool to Help Increase Your Target Customer Base](#)

[Create Semi-Custom Email Templates for Scalable Prospecting](#)

Evidence

¹ 2021 Gartner Seller Skill Assessment

² 2019 Gartner Sales Development Benchmark Report

Recommended For You

[Quick Answer: How Should SDRs Respond to Inbound Leads?](#)

[Effective Social Selling Strategies to Drive Sales Prospecting](#)

[How Sales and Marketing Can Develop Effective Account Growth Message Orchestration](#)

[Market Guide for Account-Planning Tools](#)

[Strategies for Selecting and Maintaining a Profitable Key Account Portfolio](#)

Supporting Initiatives

[Sales Execution and Demand Generation](#)



© 2021 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)."

[About Gartner](#) [Careers](#) [Newsroom](#) [Policies](#) [Privacy Policy](#) [Contact Us](#) [Site Index](#) [Help](#) [Get the App](#)

© 2021 Gartner, Inc. and/or its affiliates. All rights reserved.