OneAffiniti

How to follow up on lead opportunities

The Insights Hub gives you timely insight into campaign leads, which you can use to prioritise your accounts and increase the chances of arranging a sales appointment.

Securing an appointment requires a combination of email and phone follow-ups, which can take time and requires persistence. In this guide, we give you tips to help you maximise your chances of securing a meeting.

Key Tips

- **Treat this opportunity as a "cold call" but with confidence.** This is because you know your customer or prospect is actively researching the problem and/or solution.
- **Find a connection to your company.** Spend 5-10 minutes reviewing the lead details in the Insights Hub for the last interaction with the contact to help lead the conversation.
- **Don't mention OneAffiniti.** Only mention your campaign and brand when reaching out about the content topic or their engagement data.
- **Introduce yourself and ask questions.** Start the call by introducing yourself, your company and the reason for your call. Name key pain points that your solution helps to solve and ask if these are true for your prospect.
- **Create a follow-up schedule.** It takes an average of 5-8 follow-ups to close a sale, so make sure to follow up with calls, emails, and social.

Suggested approach & scripts

Step 1

You should begin by attempting to call the prospect. It may take a few call attempts before you get through.

Step 2

Send a follow-up email 24 hours after your first voicemail. This will assist with follow-up.

Step 3

If your prospect is not responding, then connect with them on LinkedIn one week after your first call.

How to follow up on lead opportunities

Step 1 Attempt to call the prospect

Voicemail

Hi **PROSPECT's NAME**, This is **YOUR NAME** from **YOUR COMPANY.** I was reaching out today to see if you have any questions about the the **CONTENT TOPIC** you **ENGAGEMENT ACTIVITY** (ie **DOWNLOADED, CLICKED)**. I'm available this week for a quick chat to discuss your challenges in a bit more detail. You can also call me back at XXX-XXX-XXX.

Live Call

Hi **PROSPECT'S NAME**, this is **YOUR NAME** calling from **YOUR COMPANY**. I was calling to see if you have any questions about the **CONTENT TOPIC** you **ENGAGEMENT ACTIVITY** (ie **DOWNLOADED, CLICKED)**. We've had a few of our clients reach out recently about addressing challenges like **CONTENT TOPIC**. Are these also challenges for you?"

"Over the course of the next couple of weeks, we're hosting a webinar on the future of **TECHNOLOGY CATEGORY**. Would you be interested in joining?

How to follow up on lead opportunities

Step 2 Connect via email

Email Outreach

Hi **PROSPECT'S NAME**,

I'm reaching out today about the **CONTENT TOPIC** you **ENGAGEMENT ACTIVITY** (ie **DOWNLOADED, CLICKED)**. We've had a few of our clients reach out recently about addressing challenges like **CONTENT TOPIC**.

I was hoping to take just a few minutes to better understand your challenges and share some information about the future of **TECHNOLOGY CATEGORY**.

These are a few times I have available this week:

- **OPTION 1**
- **OPTION 2**
- **OPTION 3**

Thanks,
SIGNATURE

How to follow up on lead opportunities

Step 3 Connect via LinkedIn

Linkedin Inmail

Hi **PROSPECT'S NAME**,

Recently we've had a few clients reach out about the **CONTENT TOPIC** you engaged with recently.

I'd love to share insights on how we've helped accomplish these goals for our other clients. Are you available for a quick chat this week?

Recommended Calendar

The follow-up calendar below will give you the best opportunity to secure a meeting:

	Mon	Tue	Weds	Thurs	Fri
Week 1	Day 1	Day 1	Day 1	Day 1	Day 1
Week 2	Day 6	Day 7	Day 8	Day 9	Day 10
Week 3	Day 11	Day 12	Day 13	Day 14	Day 15

Scoring & Recommended Actions

The Insights Hub is your one-stop shop for lead scoring, reporting, and opportunity management that help you close sales more efficiently. Inside the hub, your leads are scored from 1-5 depending on their engagement activity with 5 being the top priority and 1 being the lowest.

The lead details also include lead contact information and links to the source article to help you follow up as quickly and easily as possible.

Below is a summary of the lead scores and recommended actions.

Scores	Recommended Action	Summary
5	**Call immediately for recent BANT leads**	BANT* Leads created in the last 30-days are deemed ready for the next stage in the sales process as the customer has identified budget, authority, needs and timing. You should review the lead details, including the topic of source article, and make contact asap.
3-4	**Nurture recent leads**	These are subscribers who downloaded content like ebooks , white papers, etc., but don't have BANT information. These leads have shown more interest in a product or topic and are progressing in the buyer journey. Leads created in the last 30-days should be reviewed and contacted asap with more relevant information.
1-2	**Monitor and/or refresh subscribers**	These are subscribers who open and click on your campaigns. These contacts have shown some interest in the topics or products in your campaign but are early in the buyer journey. We recommend you review the engagement metrics for these subscribers like opens, clicks, and bounce rates and update your subscribers to ensure your campaign is targeting the most relevant people.

*BANT stands for Budget, Authority, Need, Timing