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| **Subject: [LEAD ALERT] Account – Contact name​** |
| ***Lead explanation​***A member of our database has recently become an SRL and is now assigned to you. This means that a person fitting our Ideal Client Profile has shown sufficient signs of engagement, such that their Engagement Score is now 100+. This lead did not explicitly raise their hand to have a meeting yet but has been engaging with DZ campaigns and content.​Your next step is to review this person's information and follow up with them according to the expectations below. Your manager (CC'd here) will review your follow-up with this lead in your 1:1's.​ |
| ***Follow-up expectations​*****Follow-up Channels & Cadence**​* Email and call within 1 business day of receiving this alert​
* Phone call and LinkedIn connection/message on the 2nd business day​
* Email and call on 4th business day​
* Weeks 2 - 4 – 3x touches per week, mix of channels​
* Weeks 5 - 10 –  2x touches per week, email / phone​
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| ***Contact info​***Contact First + Last name​Email​Phone​Title​Account​Industry​Company LinkedIn​Employee LinkedIn​Original source​Last activity signal​SRL date​ |
| ***Engagement history​*****Here are the last 3 engagements of the lead**​1. Date – engagement type – asset​
2. Date – engagement type – asset​
3. Date – engagement type – asset
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| ***How to access this info​***Video tutorial: How to find this information in Salesforce (5 min) |
| ***Follow-up recommendation​*****Follow-up Recommendations & Tips**​[Lead name] has engaged with almost every single campaign/content piece that marketing has produced this year, save for [insert content here] - they seem to obviously love marketing's content. ​**We recommend:​*** Asset one
* Asset two
* Asset three

Leverage ZoomInfo + LinkedIn Sales Navigator to identify additional, potential members of buying committees within the SRL’s account. Begin outreach to them, in parallel to the correspondence sent to the SRL.​All correspondence should be customized to resonate with each SRL.​*NOTE: Reference the digital engagement activity log within Salesforce for each SRL, read latest news on the company the SRL works for, read information on the company’s website, reference recent posts they shared on LinkedIn, etc.* |