



Dangerously MisLeading:

How some companies drive more
pipeline *without* inbound SDRs

Featuring



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Glossary for the uninitiated

- AE:**
Account executive
- Demo:**
A demonstration of the product, usually over video conference
- Disco:**
A discovery call
- MOC:**
Meeting on calendar; a win
- ML:**
Marketing qualified lead; rubbish
- SDR:**
Sales development rep; also business development rep, or BDR

1. The hot phone

To get you in the mindset to really consider this ebook and how it might apply to your situation, I offer you a thought exercise that many find troublingly realistic.

Picture a software startup with a lead AE who's a bit of an entitled prankster. He amuses himself by telling the company's first SDR that he's found that he gets far more connects and positive responses when calling from the phone in the red conference room. That particular phone is plugged into the first line in the bundle of phone lines the company uses (called a PRI), he explains. It has less lag and makes you sound clearer and friendlier.

The SDR tries it. He calls his very best contacts from the red conference room and lo and behold, he gets a high connect rate. As each new SDR joins the organization, they each learn the secret. They all reserve the red conference room for calling their best contacts and they too find outsized success. Knowledge spreads. Then the original AE is poached by another startup before he can reveal the prank.

Now, a dozen SDRs have learned a new "secret" to connecting. It works because they expect it to work; calling from "the hot phone," they're more confident, more relaxed, and more successful at overturning objections. When each SDR moves on to another company, they

excitedly share their secret about the PRI and call quality. Soon half of Silicon Valley is flooding the phone company with calls about how to get more "priority lines," which phone company sales reps, somewhat confused but also on a quota, are happy to provide.

In the end, you have thousands of people clutching to presumably sacred advice that has no basis in truth. And in fact, probably hurts them. With everyone lining up to make calls from the same phone, deals and outreach are delayed for days. And with AEs eager to get in on the action, it creates resentment and conflict as everyone who should be working together jockeys for access to the hot phone.

Think the hot phone sounds like fiction? Ask your sales development team why they do what they do and often, you'll find similarly pervasive superstitions. As this guide explains, too much of what we do in sales and marketing is predicated on untested assumptions.



Only 37% of sales reps' time is spent on revenue-generating activities.

- InsideSales.com

2. A walk down qualification lane

The first person to reach a prospect is seven times more likely to win the deal. Obvious, right? Yet websites don't seem designed that way. Often, B2B prospects complain that websites and forms feel more like they're built to frustrate and repel. In the words of one who we interviewed for this guide, "I'm trying to give you money. Why do you make it so hard?"

The short answer is qualification and measurement. It's a historical anomaly that just trying to book a call with a company requires you to hop through three channels—their website, your email, and then a phone call. (If you ever get that far.) Marketers designed the email-response form-fill in the internet's early days when websites were essentially just a digital brochure, and they wanted to capture visitors' contact information, but didn't have a better way. They invented the form-fill gate. For as long as it's been in existence, the gate has been highly unpopular.

60% of form fills never become meetings.

- Chili Piper

7 in 10 prospects use a fake phone number.

First Name

Last Name

Email Address

Business Phone

Job Title

Industry

Company Name

Country

☐ By checking this box, you agree to receive survey invitations and marketing communications.

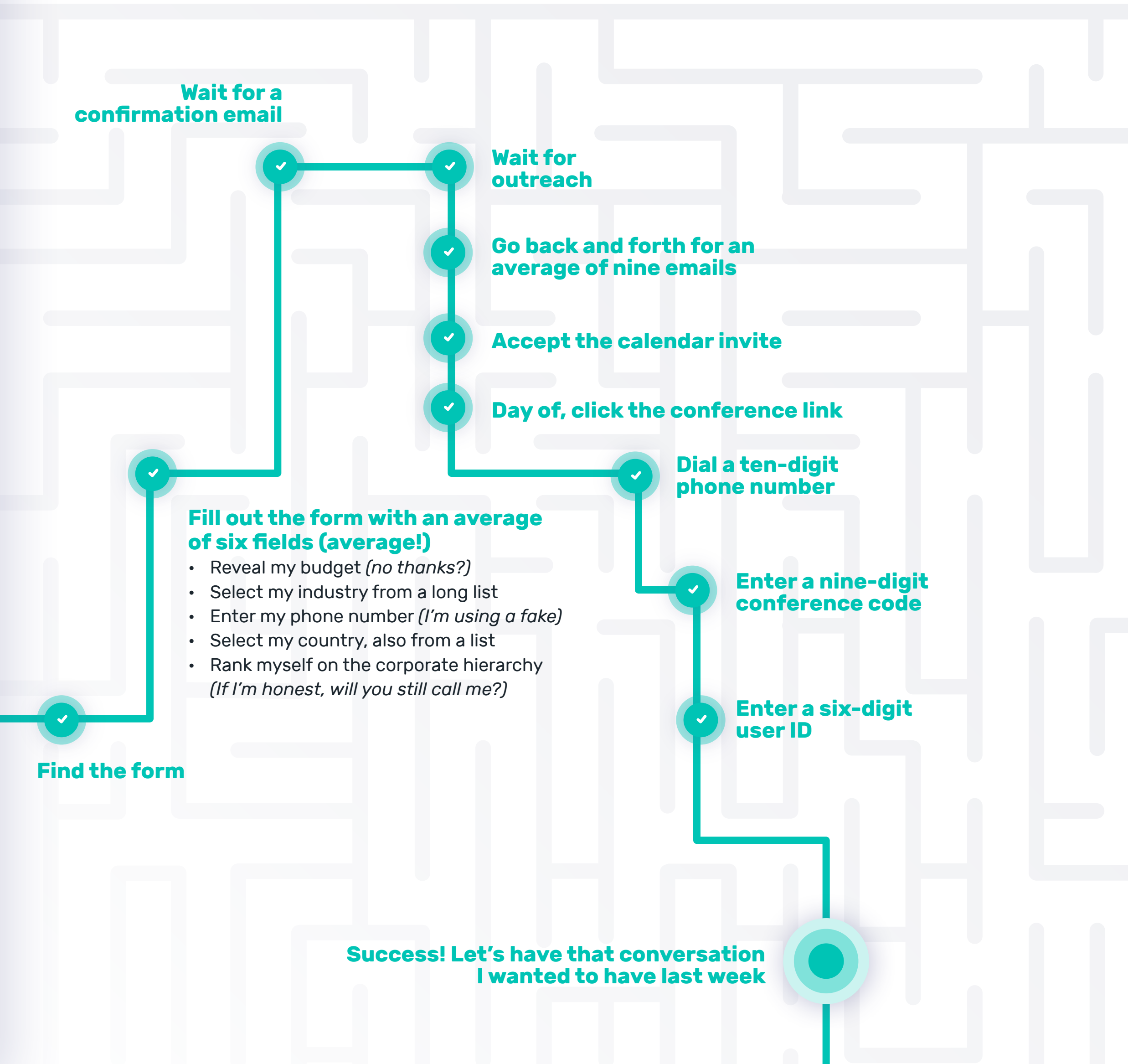
GET STARTED

This is one of those situations where companies have been successful despite the gate, not because of it. According to Chili Piper research, only 40% of leads who fill out a form with the express intent to book a meeting actually get a meeting. The other 60% do not. Allow that to sink in.

How could that happen? Broadly, there are four reasons:

1. A competitor responded faster
2. Nobody followed up
3. The urgency faded
4. It was too much work

Inbound leads are the best leads. People are dying for inbound leads. Yet 60% are wasted. And it's because marketers are pushing them through a frustrating, non-deterministic process that applies enough friction to prevent them from reaching their goal. To get a meeting with most companies today, you have to:





Andy Crestodina



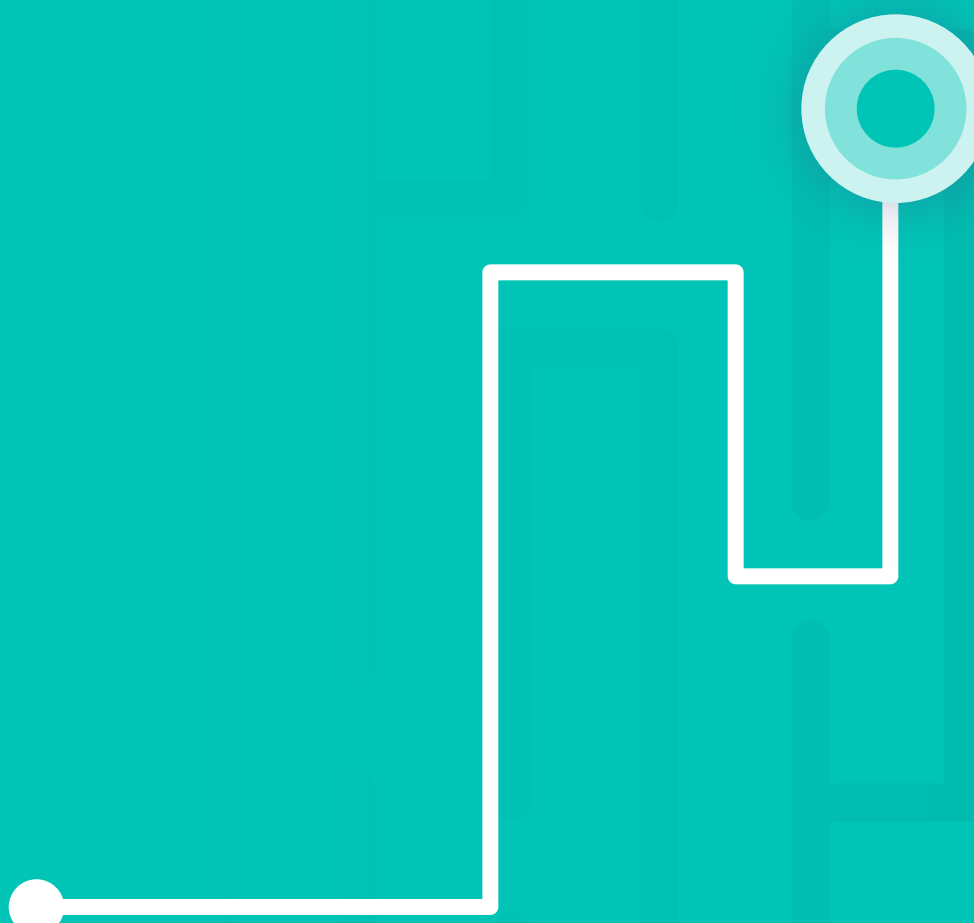
As Andy Crestodina, Founder and CMO of Orbit Media, explains, this process could be simpler and actually work better.

Uncertainty kills deals

A website's job is to answer questions but few do. Say I fill out a contact form. I actually don't know what happens next. The channel is unknown and the timing is unknown. This is the key moment—the moment of truth—and all I'm left with is uncertainty. Are you going to call me back? Will you email me? Will you do it today or in the future? Who will contact me? Is it a low level SDR? Is it your VP of sales? Is it the founder? All these uncertainties are a problem for the prospect and a big reason they feel a need to submit several forms on several websites.

Your prospects do not want to be unqualified leads. Nobody wants to waste their time. Your SDRs are not the only people who don't want to have useless phone calls or chase people down. But the system ends up creating the "hey just following up" email chase.

Why not skip the email back and forth. The tab for your calendar is open. Their tab for their calendar is open. They're on your website, why not let them immediately do the much more satisfying thing and book time right then, in the moment of inspiration? Someday we'll look back and think it was a weird idea that the contact form was ever the primary way for letting people tell us they're interested.

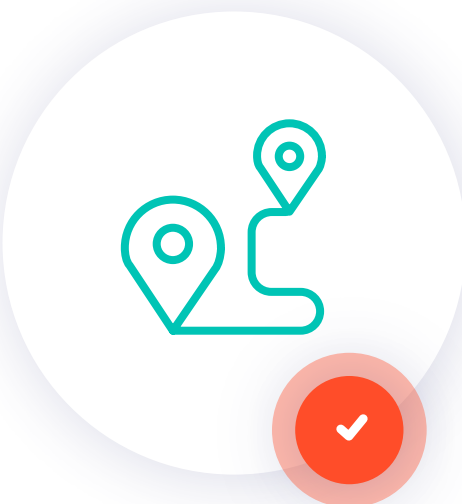


Your prospects do not want to be unqualified leads. Nobody wants to waste their time.

3. Buying hazard

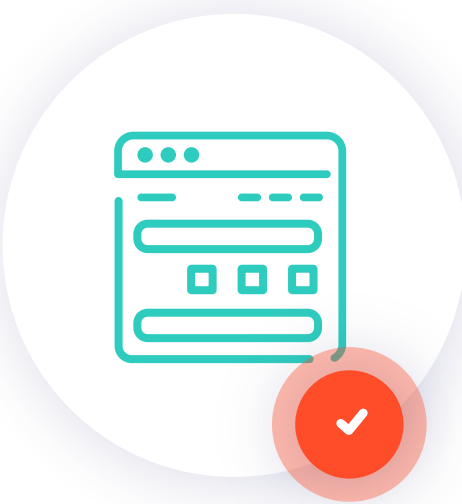
There’s really no way to demonstrate the absurdity of some sales processes than taking the journey yourself. In writing this guide, my team tagged along on half a dozen evaluations happening in our network and what we found was disheartening.

Stories from the prospect’s perspective



1. The journey that never ends

I fill out forms on three sites. I get a “thank you, check your email” landing page from each, and get an automated email from each company saying they’ll be in touch. I wait 24 hours for a response. A salesperson reaches out to schedule a meeting—they ask me for times, then check with someone internally about times. They propose a list of times. I check my calendar, then realize I’m not sure of the time zone, and ask. Once I know, I find times that match and then reply—by now, another day has passed. The SDR sends a calendar invite. I accept. The day of, I get busy and miss the call.



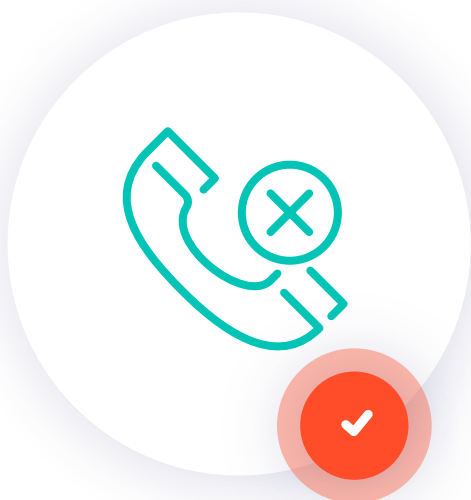
2. The ‘if not now, then never’ buyer

Our web conferencing service goes out completely. Suddenly, dozens of calls have to be rescheduled. In the moment, I’m feeling pressure from the team, so I fill out forms on four websites. The experiences really vary—some forms go in-depth while one just wants my work email. One has a chatbot, but it tells me nobody’s in and just brings up the form. I go back to waiting on hold with our existing conferencing provider while they get it fixed. A day later things are back online and I now have three emails from three different reps and a few missed phone calls. But by now, I know what went wrong with our service and I’ve lost interest. Plus, the impression I got from those companies isn’t much better than the one I already have. Now that things are fixed, switching seems like a bigger hassle and we’ll have to wait and see.



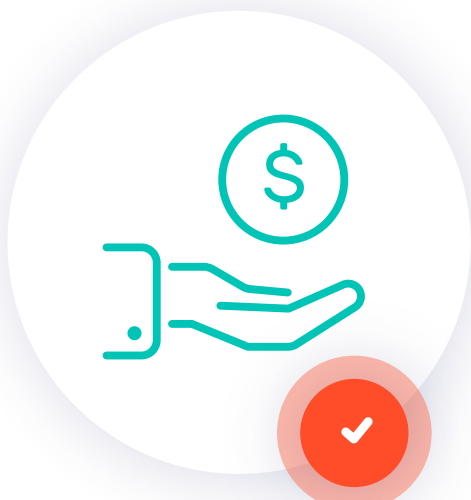
Interest has a way of fizzling—you might be interested right now as you feel the pain, but as time goes on the pain fades. Being able to take a definitive action right when you want to is huge. Prospects want to take concrete action in the moment

- Krishan Patel
Apollo



3. The presumptive give-up

This is a true story. I wanted to buy LinkedIn Sales Navigator for our team so I go online where the form says I have to talk to a sales rep. I want to buy now, but I do what I’m told and request a call. That was on a Wednesday, at the end of the day, so obviously nobody calls me. A week later I realized nobody ever called me so I email support and say, “Hey, nobody ever reached out.” They ask if I’m sure. I say yes. They take a while to get back and say that someone tried to call me on Thursday. I look, and there is indeed a missed call. On my phone, all unknown numbers go to voicemail because I get so many robocalls. I’ve gone even further—my phone actually blocks all 408 numbers. So that was it. They called once and gave up. I had to call them back.



4. The “please take my money” buyer

When I started a new startup, I needed a marketing platform so I filled out a form and got on a call with a lovely young person. For some background, I’m a previous customer of theirs from a past company and know exactly what I need. I tell them that, but the sales rep keeps saying, “Okay okay, I understand” and asks the next question on the list. He says “tell me about your business” and I start to get annoyed. I ask to speak to his boss or someone who can help me and he starts getting nervous and explaining his process and why I have to see a demo first because it’s the next step. I ask what I have to tell him to put me on with someone who can get me a contract. When I give him everything he asks for, he says, “Okay okay thanks. Let me check with the team so we can schedule the next meeting.”



Andy Crestodina
Orbit Media Studios

As Andy Crestodina puts it,

“Somebody raised their hand and said they need our help. Why would I have a low level non-expert talk to them? Why wouldn’t I roll out the red carpet to talk to this person, assuming I’ve already qualified them in the marketing stage? I want to get them on the phone with an expert who’s going to exceed their expectations and make my competition irrelevant on the very first call. Low-level SDRs just aren’t able to build the relationship that will get that prospect to come back a year and a half later if they don’t buy this time. I want them to say, ‘I remember you guys from last time. You asked really good questions.’

them hope to work with you in the future. People often tell us, ‘I talked to you a year and a half ago. I don’t even work at the same company anymore, but I’ll never forget what you told me on that first call. You helped me understand my needs better. You told me I couldn’t afford you, but I’ve wanted to work with you ever since.’

Now let’s say I had an appointment setter take that call. That person has no credibility and builds no trust. The prospect just had a negative brand experience. Using junior resources as the front-line is sort of a crazy idea. Save your junior resources for the back office.

An absolute expert, a real strategist, can both disqualify the lead and at the same time, make

Are you with me that the processes many of us have in place today are more complicated than they need to be? Are you seeing the outdated procedural baggage? If we can make them better, shouldn’t we? Why wouldn’t I want to reduce the steps and reduce the friction to be more competitive and win more deals?

We cover what to do about it next. But first, a word of warning.

4. Aim before you fire

Before you drop this guide into your work Slack and expect to start a movement, know that there are more forces at play here than just procedural baggage, and people may not want to change. Right or wrong, people are often wed to the process they know and thanks to something psychologists call the endowment effect, we actually like hard processes *because* we figured them out. People’s first reaction may be to defend what already exists::

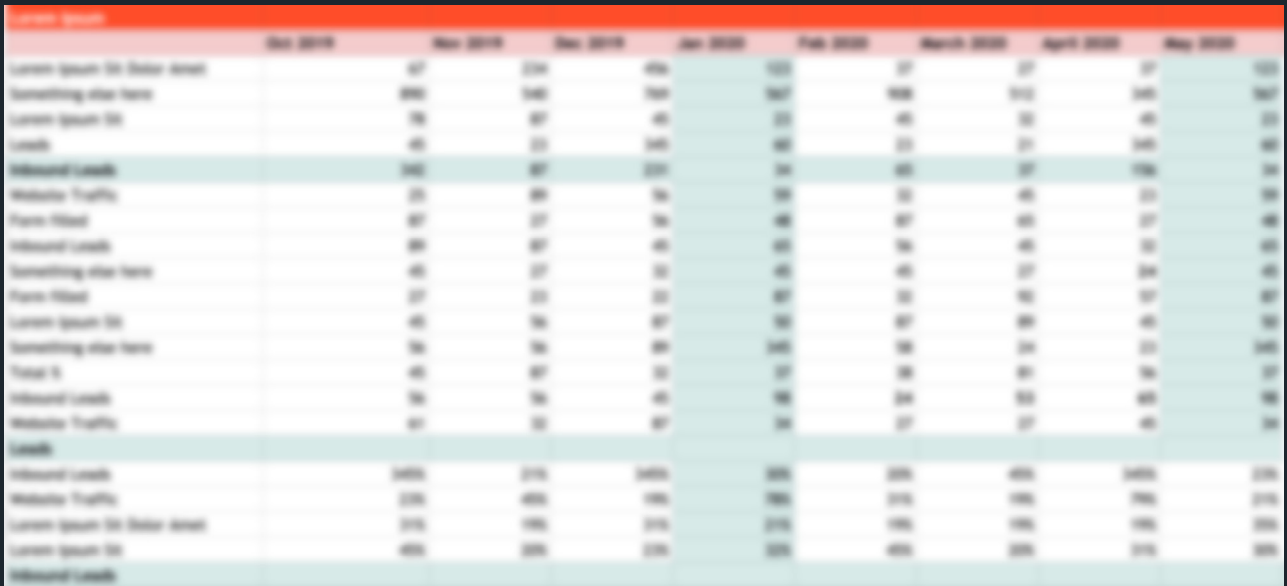
Rationale: It’s a mess, but it’s my mess

Most organizations that route inbound leads have something known as “the spreadsheet.” It’s a sprawling shared Google Sheets or Excel document with all the AEs’ territories and routing rules that tells SDRs who a lead belongs to. Some companies figure out how to build this within their CRM using triggers and rules, but most do not.

The spreadsheet is the defining crucible of SDRs’ work lives:

- SDRs get confused and route leads to the wrong AEs and get yelled at
- To use it, the SDRs need to cross-reference many AEs’ calendars at once
- The spreadsheet doesn’t update when AEs are out of the office
- Its usage is dependent on tribal knowledge. Eg. “use this macro this way”
- If the SDR has to distribute leads in a round robin based on a points system and an AE rejects a meeting, the SDR as to return the point and balance the books

The Spreadsheet



In this system, SDRs who’ve accepted a lead and found a time to talk then need to hound that prospect to actually show up to the call. That means spending valuable time writing emails, setting calendar alerts to send another reminder email, and then taking time away from prospecting to join the call to surprise the prospect by introducing them to their new point of contact, the AE.

Despite all of this administration, the response you’ll get from most SDRs when you propose achieving the same thing much more efficiently is, “But that’s my job.”



In a famous experiment, participants estimated the value of a mug twice as high if they made it themselves.

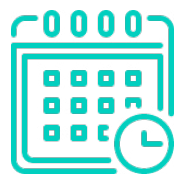
- Kahneman, Knetsch, and Thaler 1990

Rationale: That big company fear

My team spoke to the senior vice president of a large enterprise with a massive inbound program who told us, “We’re already converting 40% of leads, I can’t afford to break anything.” That is to say, he was pleased that *as many as 40%* of their form-fills were converting to meetings. It used to be much worse, he assured us, and he didn’t want to risk having any fewer. Phrased another way, his team is wasting 60% of conversations and he is glad for it. Why?

You will find this mindset endemic to overly large corporations where people are more concerned with not doing something wrong than they are doing something right. New is risky. They know that people are rarely fired for doing nothing. This can be a huge barrier to change. If this is your organization, it’s a tricky conversation to navigate. You may want to win, but everyone around you is playing not to lose, and those are very different games.

All of this is not to dissuade you from attempting change. It’s simply to ensure that you go in with eyes wide open and prepare responses to the objections you know are coming. (More on that in chapter seven.)



BOOK A MEETING
with Chili Piper

click me



Back in the early 2000s, customers would say, ‘You want me to buy your CRM and give you access to our customer data? No way!’ But times change. Now companies don’t hesitate. Booking meetings directly is like that now.

- Dave Hershenson
Tray.io



The real challenge is that technology and automation have advanced so rapidly that demand gen and SDR teams don’t even know they’re spending multiple hours a week doing things that can now be eliminated. This is where sales leadership needs to spend time investigating new tools and technologies to bring innovation to their team. For instance, asking inbound leads even two or three questions via a simple form could result in skipping an SDR qualification call completely.

- Courtney Griffin
Improvado



5. Increase sales by decreasing inbound SDRs

So here we've arrived at the meat of this guide: How to drive more sales without an inbound SDR program, or with a seriously reduced one.

This is an approach that works for many. It's not an approach for all. The way you'll know if it's for you and whether it's a fit for your business model is to strip away everything you practice today and consider your North Star goal and the fastest way to get there.

If your goal is to recognize more revenue faster, you should be concerned with converting inbound leads as quickly as possible. You can measure how that program is doing with the metrics pictured right.

If you can build a funnel that looks like that one and study your numbers, you can see where drop-offs are occurring. The biggest way to improve your numbers? Eliminate steps. If that doesn't seem like rocket science, it is surprisingly uncommon. Companies often do the opposite and add all sorts of extra steps for qualification, measurement, and all the reasons we've covered

thus far. Every single step costs you—even down to the number of fields in your form.

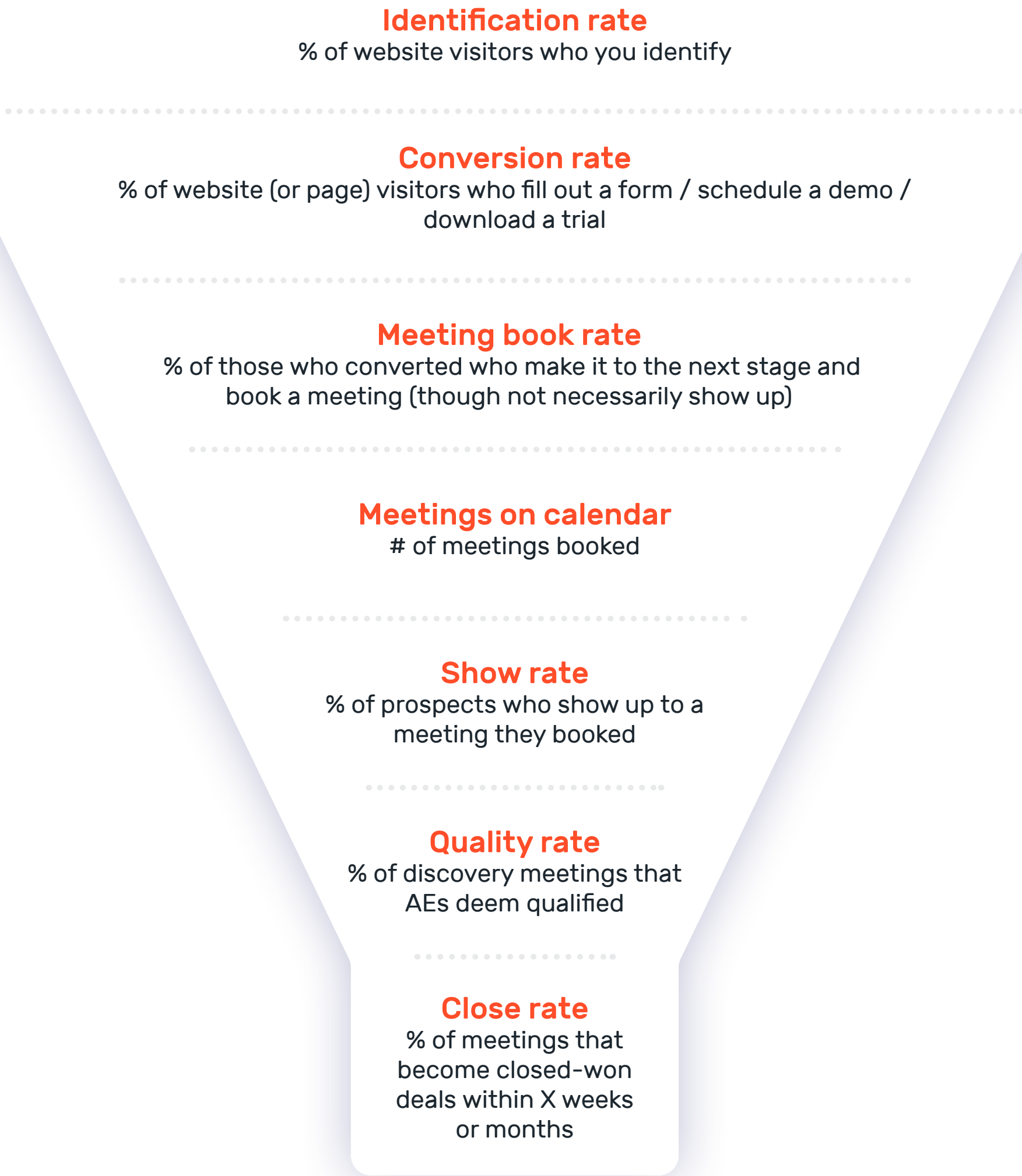
When Neil Rongstad, VP of Marketing at ChowNow, ran a study, his team was shocked to find that each additional field on the form caused a 15% completion dropoff. "I thought it'd be something, but I didn't think it'd be that high," says Neil, whose team promptly clipped several fields.

From this perspective, all the following activities are wasteful and should be minimized:

- Time between when a prospect wants a meeting and gets a meeting
- Time spent determining which AEs are available
- Time spent emailing back and forth about scheduling
- Time spent chasing leads who filled out a form
- SDR qualification calls when the AE will do the same but better
- Creating and managing opportunities in Salesforce







78% of leads buy from the first responder.



Dangerously Misleading: **Increase sales**

If you can reduce the number of clicks, calls, and touchpoints early in the funnel without worsening your metrics later in the funnel, you’ve made your organization easier to buy from. Do that and you get the “speed to lead” badge. It means you get into evaluations earlier and can influence their direction. You cut down on the back and forth scheduling and qualification that SDRs must do and thus improve the user experience—no more forcing them to get grilled by green-behind-the-ears grads. Plus—and this is among the biggest benefits—you repurpose those inbound SDRs to go outbound.

A simpler, shorter funnel confers all sorts of benefits:

-  **Better user experience**
Make a first impression that carries over to your product. Psychologists call this the halo effect: Those doing some things well are perceived to do everything well.
-  **Become the trusted shoulder to cry on**
Put your AEs in the position of joining calls where the prospect just wants to gripe about how hard the other guys were to reach.
-  **Higher close rates**
Get into deals early and set competitive landmines.
-  **Increase deal velocity**
Respond to prospects in the moment right when they’re feeling white-hot pain. Use it to accelerate the deal.

Organizations like ChowNow have taken a reductionist approach to their inbound program and it’s changed which metrics they prioritize. “Our key metric is meetings-on-calendar (MOC), not MQL. We know that MOC is the real measure of value. When prospects book meetings directly on our AEs’ calendars, they are on average 4x more likely to close. There’s zero chasing—just a call, demo, and close,” says Neil.

Neil’s team knows that adding steps into an otherwise streamlined process reduces their ROI, and should only be done if it confers a greater advantage. “If we have to use SDRs to facilitate a call and chase someone down, it reduces our investment,” says Neil. “We try to avoid it.”



Every small business thinks they’re a unique butterfly. The more you can free reps up to customize the parts of the experience that matter, the better your sales.

- Michael Goss
Intuit QuickBooks

Supercharge with automation

This is where I mention Chili Piper. It's a calendaring tool that eliminates steps to increase deal flow. It's not the only tool, but it is, I think, the best. It's the only one that automates away "The Spreadsheet" with a deep Salesforce integration that can replicate complicated role and territory-based routing rules. It eliminates the need for back and forth by inserting calendar times into a form or email, and sends automated reminder emails to ensure people show up. Prospects can also call directly through an auto-dialer—no follow up needed.

Whatever tool or combination of tools you use, the best way to get from inefficient to efficient is to:



Optimize your landing page

Use a calendar widget that automatically searches salespeople's calendars and allows prospects to book time right from the website. Such a tool offers certainty, and buyers feel delight.

Use a data-appending service so you get everything you need to qualify from a company email, and can reduce your form to just that field. Use conditional logic so if a visitor isn't qualified, they get a traditional form whereas if they are qualified, they can either book a time or initiate a call right then and there.

Use a chatbot with a calendaring feature. If prospects are qualified, it can offer meeting times.



Optimize your emails

Use a booking widget to automatically insert meeting times into an email based on your availability. Find one that offers buttons with times so the prospect can book in just a few clicks.

Use a booking widget to place a calendar booking link in salespeople's signatures.



Score leads

Use your data enrichment tool plus a lead scoring system to score your leads so you know whether to route them to an AE, an SDR, or simply offer them a form.



Route intelligently

In the booking widget, recreate the conditional routing rules that are traditionally handled by SDRs and "the spreadsheet." That includes sorting by AE availability (are they out of office?), region, vertical, round-robin, point system, or any number of demo- or firmographics.

Not every question can be captured in a form or data appending service. For instance, Twilio's sales team found that the most important factor was to know whether the team had already begun a development project. But in that case, having collected everything else, they learned that rather than a 45-minute call, they only needed 15 minutes.

All this tech allows me to track opens, clicks, multivariate tests, and how many calls, how many emails they should have in a cadence. That's where you find real competitive advantages.

- Michael Goss
Intuit QuickBooks

Dangerously Misleading: **Increase sales**

The effect

When you rearrange your inbound process with tools like these—calendar, data appending, and scoring—you win back some portion of the 60% of leads that never get a meeting.

There are also ancillary benefits that you might not expect, like a greater sense of fairness among AEs. “When you have humans involved, there’s bias. An SDR can route leads to an AE they’re friends with, or have worked with a lot, and if several of them are doing that, you create justified feelings of inequity among sales reps and new people can’t succeed,” says Luis at Carta.

You also vastly increase the consistency with which you follow up on leads. Without an equitable and efficient system, AEs cycle through feast and famine, and the highs are tempered by the fact that in busy times, AEs ignore “okay” leads that in lean times, they’d beg for. With a more efficient system, more leads get better coverage.

But enough theory. In the next chapter, you’ll find case studies of companies who’ve done it.



BOOK A MEETING
with Chili Piper

➤ click me



You’re taking out all that administrative process probably taking 20% of the time of SDRs and putting it back in their hands to go after more meetings and that’s huge.

- Luis Roca
Carta



The automated process for ensuring that a meeting holds, in the past, was something our SDRs spent a lot of time on. The calling and texting and emailing to confirm—that all goes away.

- Neil Rongstad
ChowNow



6. Stories from companies that did it

This has worked for large enterprise companies selling to SMB, software startups selling into large enterprise, and every variant in-between. It has less to do with deal size and more to do with whether you want your salespeople to connect with prospects when they want to talk. “Even if you have a high-consideration product with a highly consultative sales process, you still might have a quick lead gen process with short website visits,” says Andy. “Your visitor might not be a senior person. They might be considering a bunch of options, so the speed at which you connect them with an expert is more important, not less.”



Apollo drove 300% more revenue with half the salespeople

B2B lead generation and sales enablement platform

The initial setup

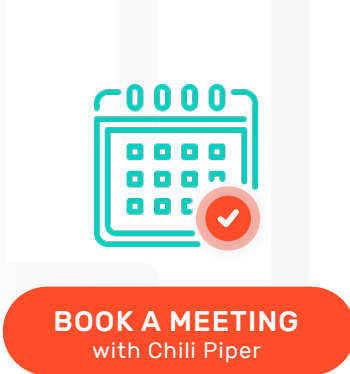
In the beginning, Apollo had trouble generating significant inbound interest, and had to rely heavily on outbound with a team of four SDRs and four AEs. While trying to diagnose their pipeline issues, they noticed that on the inbound side, only 60% of the prospects that filled out their demo request form would actually book a meeting, even after going through a three-email sequence. For outbound, they noticed that their SDR team was doing very little calling and relied heavily on cold emails. When they measured the output of their SDR team based on tasks that only an SDR could do, such as phone calls, they realized they were actually earning a negative return on that team.

The switch

As a first step to generating more inbound, the team implemented the calendar scheduling tool Chili Piper which allowed scheduling right from the website, and integrated Apollo’s enrichment data to reduce the number of fields. They saw a 50% increase in inbound meetings booked. After closing that gap, the team invested more in inbound lead-generation initiatives, achieved unprecedented levels of inbound traffic, and entered a virtuous cycle. On the outbound side, they used Apollo to automate the sending of personalized cold emails on behalf of their AEs, but the AEs became so busy that they didn’t create opportunities in Salesforce unless deals were about to close. To fix this, the team integrated Chili Piper with Salesforce to automate opportunity creation. This allowed them to accurately track their win rates, lead sources, and sales cycle lengths in Salesforce, and so scale their demand generation.

The result

300% higher revenue with half as many salespeople.





ChowNow found a channel with a 4x close rate

Food delivery app

The initial setup

ChowNow had an inside sales team, an outside sales team, and SDRs supporting both. Marketing measured its effectiveness at driving leads by MQLs.

The switch

The team adopted Chili Piper with some hesitation. They worried that people would find the option to book directly off-putting. Buyers didn't, and meetings that booked directly with AEs had a 4x close rate. "That raised a question," says Neil Rongstad, VP of Growth Marketing at ChowNow. "Were the people who booked meetings directly just more likely to buy? Fortunately or unfortunately, we got an answer. We messed up our queue and for a while, people couldn't book directly. The close rate dropped back down to normal."

Direct booking has reduced ChowNow's need for inbound SDRs, but hasn't affected its need for outbound ones. With outbound, SDRs are still needed to manage AEs' calendars because they have to book based on what neighborhood the AE will be that day.

The result

More meetings, more pipeline, slightly lower show rates.

What we've found is that people want meetings when they want them. If they fill out a form that tells them someone's going to call them back, they move on to something else. Now we're meeting that expectation in the moment.

- Neil Rongstad
ChowNow



Intuit QuickBooks found a shortcut to more meetings

Accounting software

The initial setup

The team wanted a better way to identify new inbound leads and to align sales' efforts with the traffic marketing was driving. Leads didn't always reveal themselves by downloading gated content, and when they did get in touch, there was a lot of back and forth for scheduling. "Sales is sometimes a challenge of infrastructure, especially for mid-size companies or larger," says Michael Goss, Senior Marketing Manager. "You need to get all the admin and back and forth of emailing out of their way so they can send fewer notes, but more personalized notes."

The switch

Michael installed meeting booking widgets on the website and marketing emails and they've seen an increase in lead generation and book rates. "Automate the arbitrary so you can

preserve the human contact," says Michael, "especially for small businesses where it's personal and they're all unique."

The result

Saved salespeople time, more meetings

Automate the arbitrary so you can preserve the human contact.

- Michael Goss
Quickbooks



Tray.io drives more meetings

Integration software

The initial setup

The Tray.io team wanted to know what they didn't know: Whether they had a show-up problem. Prospects would fill out forms to book a meeting, and the dropoff was immense, but they also suspected, many of those that booked wouldn't show up. Though the marketing operations team couldn't tell for certain.

The switch

With Chili Piper, the team was able to measure show-up rates and saw an increase in conversions from MQL to SQL. "We saw a huge leap in the net number of meetings," says David Hershenson, the Chief of Staff. "Giving people a way to directly book from the website, from email signatures, and to throw times right in an email proved itself right away." Beyond more bookings, the system gave David's team more flexibility to throttle meetings for new AEs while they ramped and to remove AEs from the queue automatically when they were on vacation.

The result

SDR time savings, more meetings, more insight, more agility



Carta gives SDRs 20% more time for outbound

Financial software

The initial setup

Carta relied on a spreadsheet to help SDRs route leads based on a points system. "As you know, anything that's manual and has to be constantly changed is prone to errors and lags," says Luis Roca, Sales Operations Associate. "That was killing our lead conversion time and the evenness of our distribution. Operationally, we were very slow at tackling those leads that came in." To book meetings, SDRs had to look at the calendar of every AE available and message them on Slack to ask if they could take a meeting. When AEs rejected a meeting as unqualified, SDRs would have to return to the spreadsheet and reset things.

The biggest issue was that such a subjective system left room for bias. SDRs routed to AEs who were their friends, or who they knew were more likely to close the deal.

The switch

Luis' team implemented Chili Piper for a completely blind round robin. SDRs select a few dropdowns, the system checks the queue in Salesforce, and it's routed automatically. Now

Luis' team knows exactly how many meetings of which quality are sent to whom, and can judge AE effectiveness with more impartiality.

"You're taking out all that administrative process worth about 20% of their time and putting it back in their hands to go after more meetings and that's huge," says Luis. "It's hard to measure that impact but you can feel it when you sit down with an SDR who says 'I used to spend two hours getting this meeting out and now it's a few clicks.'"

The result

SDRs save 20% of their time, an equitable round robin, insight into who gets what

It's hard to measure that impact but you can feel it when you sit down with an SDR who says 'I used to spend two hours getting this meeting out and now it's a few clicks.'

- Luis Roca
Carta



Try it out. Book a demo with Chili Piper

BOOK A DEMO

7. How to convince your sales team

To broach the conversation with your sales and SDR team, come armed with facts. Not every team has the appetite to change how it does things. But if the company wants to be efficient, they will need to.



OBJECTION 1
Our situation is unique

RESPONSE
Great, let's run an experiment

OBJECTION 2
This is the best way to train SDRs

RESPONSE
It's not, it's a receptionist job. We're not hiring smart people to answer the phone. The real way to develop sales skills is outbound. We should free those reps to build sales skills.

OBJECTION 3
This will fill AEs' calendars with junk meetings

RESPONSE
It won't if we change our site to educate prospects properly. No buyer wants to be an unqualified prospect. Junk meetings happen when you hide your pricing and what you do to trick them onto the phone. Plus, using AEs to quickly disqualify leads is more efficient than employing SDRs, and it gives them a chance to build a relationship and lay the groundwork for a future sale.

OBJECTION 4
Prospects need a sales motion

RESPONSE
Great, let's get them direct to an AE who can actually help them.

OBJECTION 5
We're in the middle of restructuring our website / process / org

RESPONSE
Great, no better time to experiment.

OBJECTION 6
We have people who do that

RESPONSE
Those people should be outbound. The same way auto-calling services allow reps to take 4x as many calls, this gives AEs 4x as many meetings. This puts our reps to their highest use.

OBJECTION 7
I just don't think it'll work

RESPONSE
Let's test it. Other companies have seen benefits, we can measure it, and it doesn't mean SDRs will be out of a job—they'll just be outbound and improving our numbers. We'll have:

- Faster times to meeting and higher close rates
- Automatic routing, so less room for bias and new reps won't be starved for good leads
- Reporting on show rates so we can determine the next best action

OBJECTION 8
What about the cost of getting it wrong?

RESPONSE
What about the benefit of getting it right?

8. What to do with your inbound SDRs

Promote them from receptionist to CEO

Here at the end of the road, we reach the inevitable critical question: What does one do with their inbound SDRs? Or your SDR managers? The answer: You don't let them go. Instead, you promote them to a more rewarding career track.

"A big problem I see today is that the SDR role is just a mind-numbing rite of passage and not actually training to be a salesperson," says Luis at Carta. "The skills they should be learning get diluted by what is essentially just administrative work. Nothing about managing a calendar teaches them how to sell."

The failure rate among AEs newly transitioned from SDR roles is shockingly high and the reason is, the focus was never on nurturing and closing deals. It was on not screwing up "The Spreadsheet." It was on how to cozy up to the AEs willing to flip opps. It was on sending really creative personalized emails that perform, statistically, little better than unpersonalized emails, because it's less intimidating than cold calls. Asked to take on more responsibility, too many SDRs who graduate into AEs find that their years-long training was no training at all.

Your SDRs need to graduate from farmers to hunters. From receptionists to CEO of their territory. Outbound is the best school, and they aren't going to focus on it until deprived of the steady

stream of readily interested leads who require little convincing ... and who should talk to an AE anyway.

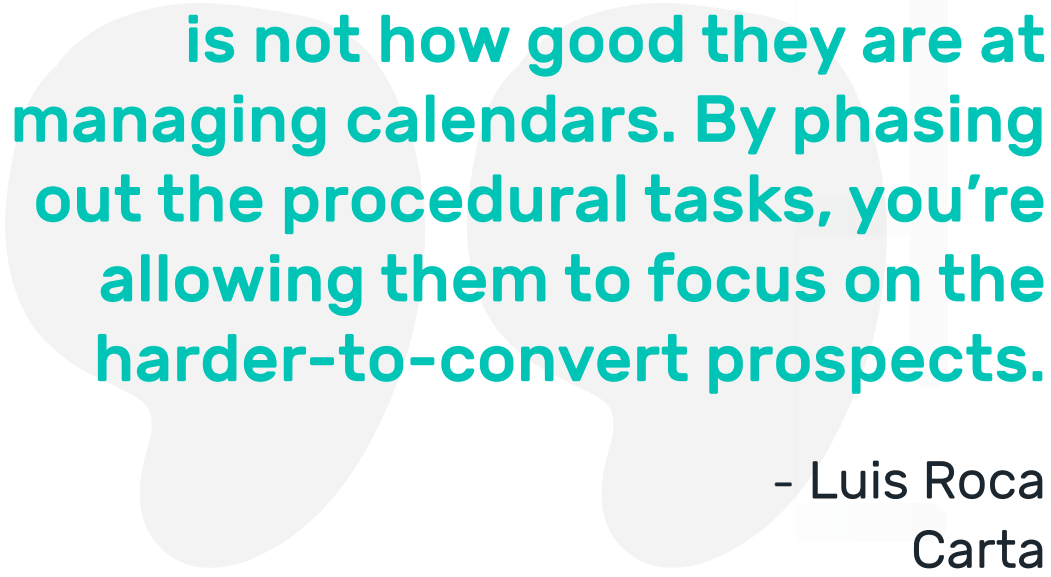
Promoting everyone to outbound is probably, for some readers, impractical. (See chapter four.) You can still take this philosophy and phase it in. An easy transition is to route hot leads directly to AEs and task inbound SDRs with chasing down leads that come from places other than web bookings. For example, from webinars, events, deals that went dark, or content downloads. Slowly, you can blur the distinction between inbound and outbound, and eventually, where it makes sense, focus on just the outbound.

I have one last case study to share—my own. It's from my previous company, where I implemented Chili Piper. The productivity gains of direct bookings were substantial. But the real exponential increase in our sales came from the fact that we repurposed SDRs to a mixture of outbound dialing and chasing down the harder to reach marketing leads. We removed them from the busywork and procedural baggage and from the thinking that "just because everyone else does it, it must be right." That year we generated over 100% more pipeline.



2020 will see significant bot adoption, particularly around straightforward and non-mission-critical SDR touch patterns.

- TOPO



The value proposition of SDRs is not how good they are at managing calendars. By phasing out the procedural tasks, you're allowing them to focus on the harder-to-convert prospects.

- Luis Roca
Carta

Now is the time for tough conversations


Within my lifetime, “computer” has gone from someone’s job title to being the often invisible machinery that eases everyday life. Computers didn’t automate everyone out of a job. Instead, they rescued us from the endless tedium of data collection and entry so we could engage in more meaningful and satisfying pursuits. It’s the same story for calendaring and inbound lead generation. More sensible meeting-booking tools offer any company with a website a way to deliver a more satisfying user experience, and to connect buyers with a qualified sales expert right away, with better tracking to boot.


The question is not whether streamlining your inbound funnel is a good idea. It is happening. The many interviewees featured in this book are ahead of you on that. Rather, the question is how long do you think you can hold out not doing it in an increasingly competitive digital world?


Learn more about streamlining your inbound at ChiliPiper.com.


About Chili Piper


Chili Piper’s scheduling app easily integrates right into your existing marketing and sales stack so you can get up and running in hours.


 PandaDoc


 RingCentral


 Square


 tray.io


 Segment


 intuit


 ChowNow


 Clearbit


 airbnb

 TripActions

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 Sendoso

 UserTesting

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