Personalization Quick Reference Checklist

Here is a list of tips for sales development representatives to personalize outreach to target accounts and individuals.

Account Level

If you are targeting specific companies, use these data points to personalize your outreach.

- [x] Funding announcements
- [x] Recent big customer announcements
- [x] Terminology used for their titles
- [x] LinkedIn Ads or PPC Ads they are running
- [x] New hires
- [x] Tech stack - the software they are currently using
- [x] Who their customers are, what industries they're in
- [x] Who their competitors are, what their competitors are doing to innovate
- [x] What's included in their annual statement and mission statement
- [x] Upcoming marketing events, recent pieces of content, or campaigns
- [x] Quotes from their company website
- [x] Specific teams that work at the company (do they have separate regions or tiers?)

Individual Level

If you're looking to personalize your pitch to a specific person at a company, use the following data points.

- [x] LinkedIn activity (likes, comments, posts)
- [x] LinkedIn job description - find a specific project they worked on
- [x] Podcasts, interviews, mentions of them on the company website
- [x] Prior companies
- [x] Groups or communities they are a part of