



# Methodology

## 1 High-level strategy

First, a high-level strategy or detailed go-to-market (GTM) plan. This strategy should determine your Positioning, Pace, and Practice.

## 2 Playbook

You season it with a sales development playbook consisting of Targeting, Tools, Prospecting, Qualification, and Follow-Through process. Having both of these dimensions in place will ensure your success in market entry and scaling.

## 3 Execution

Of course implementing this playbook and seeing it in action is what matters the most, so 3rd and final step is Execution.

# High-level strategy

This part of service comes in a form of workshop. Full package includes 2 days of workshop, please find agenda of the first day below:



## Intro to data driven B2B sales

How to use data you generate and build a predictable pipeline



## ABS (Account Based Selling) best practices

Introduction to ABS process, mapping, approaching and losing key accounts



## Sales recruitment process

Best practices of recruiting LRS (Lead Research Specialists), SDR (Sales Development Representatives) and AE (Account Executives)



## ICP (Ideal Customer Profile) definition

Key part of the workshop, diving deep into your ideal customer picture, considering industries, regions, verticals, size & custom data



## Guidelines to list building

Best practices of to-qualify list building, scraping and never running out accounts to work on



## TAM (Total Addressable Market) capture

Capturing total numbers of accounts you will be able to target



## SaaS pricing

Constructing the best & optimal pricing considering your market, TAM, sales cycle, product complexity and sales model

# Playbook

Second day of workshop is purely focused on your sales operations, the essential part of the playbook. Agenda below:



## Outreach templates updates and adjustments

Constant help on your outbound messaging, tweaking and providing new templates on demand



## Weekly KPI's tracking

Help you track your sales KPI's, give insights and advice on shifts if necessary



## Demo call best practices

Best practices on constructing and leading a demo/discovery call and making the right next steps



## Cold calls and/or cold emails best practices

Best practices on different cold outreach channels, timing and message content



## Outreach campaign tweaking and adjustments

Constant help on your outbound campaign steps & cadence, tweaking and adjusting it to market needs



## Cold email reply system

A system that keeps your mailbox clean and always following up on time. Never drop the ball again!



## CRM setup + best practices

Picking the most suitable CRM for your company, setting it up and sharing the best practices on how to maximise its effectiveness and keeping it tidy

# Execution

All of the information is useless if it can not be put to work. If you decide to move on with Refined Sales Development service we will do all the outreach on your behalf.



## Email infrastructure + deliverability setup

We will help you to prepare your domain for outbound sales. Including safety assurance and anti-spam measures.



## Omnichannel outreach & meetings-booking

A dedicated SDR's will approach your key accounts using various channels for communication. Email, Phone, LinkedIn, Social, and other channels relevant to your ICP. You will receive calendar invites to qualified business meetings with your key accounts.



## Outbound templates & A/B testing

Based on the best experience worldwide we will design custom messages for different markets/ industries/personas/channels. We also have the ability to A/B test these templates on a big scale and tweak them according to results.



## Dedicated team (LRS, SDR, Account Manager)

This service includes a team of professionals focused exclusively on your business. Built on the principles of a specialized sales team. LRS will generate leads, SDR will outreach, AM will manage the whole operation and report directly to you.



## Lead generation

Internal sales employees without a proper sales team structure will spend at least 60% of their time on non-selling activities. This mostly consists of lead research. Using our know-how we are able to cover this part productively.



## Weekly sync calls + regular support

A dedicated account manager will report directly to you. Measure what really matters. Get insights and trends to validate your ICP, analyze decision-maker responses, optimize SDR activities, and visualize your top-of-funnel sales success in real-time.

# Deliverables

## Meetings booked

Worst case **8/mo**  
Most likely **16/mo**

## Companies outreached

**±2400**

## New opportunities

**7**

## New clients

**1**

Approximate deliverables are measured by best practices of B2B SaaS companies operating in Europe and US. Most likely case is not a cap on delivery.

# Pricing

Full workshop

## Strategy & Playbook

€ 5K

one time payment

## Refined Sales Development

€ 5K

per month

- 1 Full-time LRS
- 1 Full-time SDR
- Account Management
  - Tools

# Companies using this playbook

This methodology was built and battle-tested around the world over the past 10 years. People booked thousands of meetings and conducted hundreds of internal and external customer research interviews. We hope it serves you as well as it has served – and continues to serve – us.

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viaCoreX



Let's partner up!

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