

The modern prospecting workflow

How to improve sales methods for sales leaders, sellers, and rev ops



Get on board with better prospecting

Pop quiz: Why do sales teams struggle? Answer: Because traditional prospecting methods need reinvention. That's why we built a platform that addresses the most common problems found in sales.

This guide is for you if:

- **Your sellers spend too much time each day clicking between screens. They're frustrated by the design and functionality—or lack thereof—of their tools.**
- **Trying to decipher stale vs fresh data is like playing the early 90s game Minesweeper, and feels similarly dated.**
- **Prospecting efforts are unorganized and don't produce the desired results.**

Not to brag, but we've done our homework on how to prospect. This guide will talk about what's wrong with prospecting these days, and explain why our platform is so revolutionary and necessary. Expect plenty of helpful tips and practical examples along the way.

Let's begin!

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The current sales climate

A call for change

It's harder than ever to make the right choices for leading a sales team. The marketplace is saturated with tools and advice, but it's unclear what actually works. Artificial intelligence promises big returns, but can also intimidate sellers and fall short of its ambitions. Teams are grappling with tough decisions around how to balance their resources, while still needing to hit quota.

Meanwhile, economic and social changes have upped the ante on the effort it takes to connect with a prospect. Sellers — who are often brand new to the professional world — need to be hyper-organized and up-to-date on selling practices. There's less room for error, and every action counts.

In order to succeed, sales teams need to address these problems head-on.



The old way of prospecting

What sales teams are getting wrong today

Let's face it: While buying behavior and outbound prospecting has changed drastically, most sales teams haven't matched the pace. Their tech stacks are inadequate, mostly because chosen solutions don't integrate with each other.

Meanwhile, sellers rely on manual, tedious, and redundant workflows. Convoluted processes, when conducted with tools that don't work the way they're supposed to, has resulted in subpar prospecting efforts.

Tell-tale signs that your prospecting habits are stuck in the past include:

- **Struggling to find the right leads and knowing when to reach out**
- **Using templates for cold outreach**
- **Your personalization efforts don't go beyond using a prospect's first name**
- **Deficient tools enable bad habits. Sellers prospect at a high volume with low quality, resulting in wasted efforts and poor results**



On average, sales teams have 13 tools in their tech stack, but only regularly use 8.

The cause of prospecting problems

- Sellers spend too much time on manual tasks that can be automated.
- Tech stacks are tool heavy and not seller friendly – they don't integrate with each other and add steps into a seller's workflow.
- Deficient tools enable bad selling habits. Sellers prospect at a high volume with low quality, resulting in wasted effort and poor results.

Modern prospecting

Revolutionize your seller's workflow for optimal results

Modern prospecting workflows offer a solution for sales development teams looking to optimize their outbound efforts. A good workflow should bring together everything your team needs to simplify prospecting — so your sellers become more competent, more confident, and more effective.

Workflows should address the most commonly encountered prospecting problems through a suite of capabilities that facilitate a smoother experience. From identifying potential buyers to hitting “Send” on the first message, a streamlined workflow makes complex, time-consuming tasks simple and quick.

The majority of tools you use in your sales process are probably dedicated to helping you close opportunities you’ve already opened. Sounds right?

LeadIQ is relentlessly focused on the critical steps it takes to create those opportunities — reaching the right people, at the right time, with a message that earns their attention.

Without the right tools, each of those steps is complex and time consuming. (Even for experienced sellers.) Build your team’s workflows in a way you can ensure every member of your team is using an efficient, strategic process to get the results you need from your outbound motion.

Modern prospecting should:

- Simplify workflows, providing more time for important, revenue generating tasks.
- Streamline your tech stack, eliminating redundancies and allowing tools to talk to each other.
- Provide data insights into targeted prospecting results.
- Use automation and AI to empower sellers to prospect at scale without sacrificing quality

Tools are useless if wielded incorrectly.

The average sales team has about 13 tools — but use no more than eight on a regular basis. That extra tech may be sitting on the bench because it's cumbersome, hard to learn, or plain obsolete. Either way, it weighs down sales teams.

The LeadIQ platform helps you clean up your act. Its user-friendly design is built for simplicity. It acts as MVP not only because it's usable and useful — but because sellers want to use it.

Optimize how you use LinkedIn Sales Navigator

Most sales teams prospect with LinkedIn Sales Navigator, and for good reason. It helps you find target buyers and ideal customers more efficiently than almost any other tool.

Because it's so fundamental to the prospecting process, we built a tool that meets you there.

The LeadIQ Chrome extension helps sellers prospect from LinkedIn Sales Navigator more effectively. Just find a great lead to pursue. We mirror your activity in LinkedIn Sales Navigator — and we provide contact information for your ideal buyers, verified in real-time.

Connect your stack to streamline workflows

A typical prospecting flow takes way too many clicks and way too many tabs. LeadIQ is designed to minimize the steps it takes to capture and sync data to essential systems like your CRM and sales engagement tool.

From Sales Navigator, without ever switching screens, sellers can determine if a contact already exists in your Salesforce instance or if they should capture and sync that contact's info to your CRM and sales engagement tools with a single click. That's right. Just one.

This workflow saves sellers an average of 5 hours per week. What could you use those extra hours for?

LeadIQ Identify

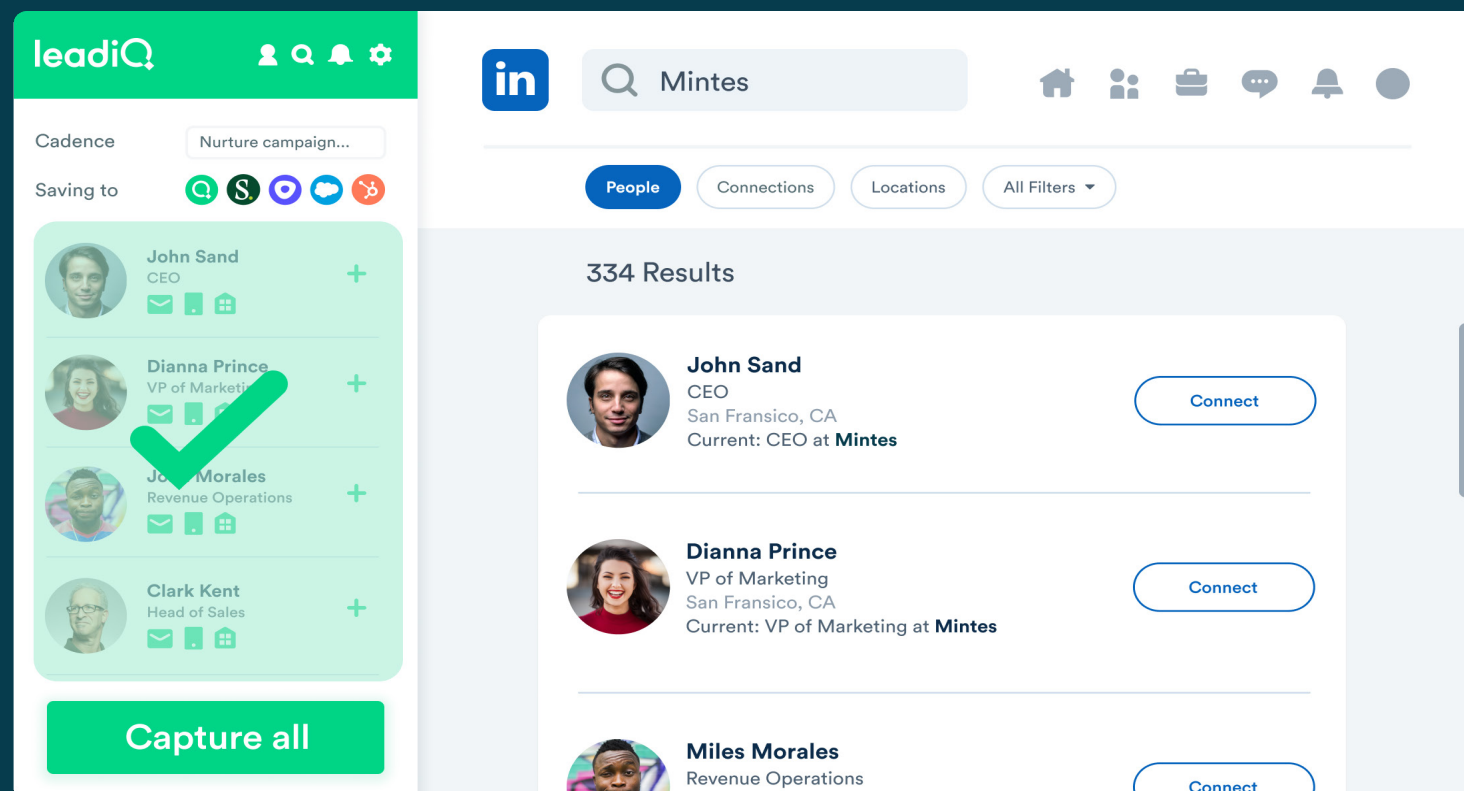
Find, capture, and sync contact data in one click

The first step in quality prospecting is knowing where to look. LeadIQ's Identify capability helps teams find and sync accurate contact data for ideal prospects in seconds. It works alongside LinkedIn Sales Navigator, allowing teams to locate real-time information on qualified prospects and upload it to your CRM.

From there, prospecting becomes as easy as 1-2-3. Begin your outreach directly from LeadIQ by simply choosing a sequence or cadence.

A day in the life of a seller

- Start your day off on the right foot using LeadIQ Identify to capture and sync contact data in one click.
- Begin outreach by placing those contacts in a sequence, cadence, or flow within your engagement tool of choice.
- Save hours each week. Get a cup of coffee, stretch your legs, and return to prospecting.



The right data makes your outbound motion smarter.

We started off as a data company, and believe that accurate contact data should be a given. That's why our platform provides data-driven insights to make prospecting more effective and efficient.

This includes alerts to surface timely reasons to engage accounts. Job changes can become a part of your strategic outreach to build a warmer pipeline. Get notified of relevant job changes for target accounts and contacts. Maintain relationships with past champions and buyers as they move.

Prospect smarter, not harder.

Contact information to reach your ideal buyers

Contact data is the foundation of any outbound sales motion. Without it, it's impossible to reach your ideal buyers. Considering how often people change jobs these days, having verified contact information in an up-to-date database is paramount for sellers being able to prospect confidently.

LeadIQ speaks to this need by taking a trust-but-verify approach to data. We verify information in real time as users search, thoroughly evaluate and test our data partners, and use our proprietary deliverability algorithm to check email addresses and provide a confidence level for everyone. We also use feedback loops that allow users to flag incorrect contact info for a manual check.

Monitor role changes within target accounts

Get notified when an ideal buyer joins, leaves, or is promoted within your target account list. AEs multi-threading into key accounts, CSMs maintaining relationships with account, and SDRs/BDRs timing cold outreach for relevancy will all benefit from this ability.

Follow former champions for warm leads

Get notified when a former buyer, champion, or power user joins a new company. Why? Because previous buyers are three times more likely to buy again.

LeadIQ makes this easy by sending users monthly updates on contacts who changed jobs, as well as their new contact data: Including job title, company, email, and mobile phone.

LeadIQ Track

Track key sales triggers in one place

The more organized and up-to-date you are on your prospects, the easier it is to effectively engage them. That's why we invented Track. This capability lets you know when someone on your list changes jobs or their role in a company.

Why? Because those moments are ripe for action. Significant career changes are ideal times to touch base and explore new ways to work together.

Track also ensures your contact information is up to date so that making a connection is a cinch.

In an era where relationships count more than ever, Track is a vital resource for keeping in touch with contacts with timely, accurate outreach. Connecting with those who matter most allows you to close deals faster and win more business.

Rockstar SDRs use Track in their daily

- **Stay tuned on key insights:** Follow your target accounts and contacts. Know when contacts get promoted, leave a company, or start a new job.
- **Time outreach perfectly:** Get notified of sales triggers in real time. Open doors and build relationships with quick, timely outreach when it matters most.
- **Close deals faster:** Spend your time engaging with the most receptive leads while multithreading into accounts most likely to convert.

The screenshot displays the LeadIQ Track interface, which is designed to monitor contact activity and job changes. The main section, titled 'Jobs Changes (25/2268)', lists contacts who have recently changed roles or companies. Each entry includes a contact's profile picture, name, email, and a summary of their previous and current roles. For example, John Sand is shown as a CEO at Mintes, having previously been a CEO at Dryden IT. The interface also features a 'Filters' sidebar on the right, allowing users to refine their search by criteria such as 'Track' (Past Customer), 'Title Keyword', 'Seniority', and 'Function'. A 'Reset' button is provided for clearing filters. Additionally, there are several floating contact cards that provide more detailed information about specific contacts, including their engagement overview and a list of target accounts like Apple, Autodesk, Cloudera, Everbridge, Google, LeadIQ, and Microsoft.

Personalize every message for more replies and better results.

Personalization is essential, and proven to get better results. But what works best isn't easy. Personalization takes time, research, and creative skills.

It can take 20 minutes to perform the due diligence that earns a response – per email. Without that effort, sellers aren't likely to get back to you.

LeadIQ conducts that research in a matter of seconds. Its research capabilities allow you to personalize each message on the level of an industry, company, or individual. AI technology crafts hyper-personalized messages that go beyond the gimmick and speaks to prospect's exact interests and pain points.

Streamline personalization research

Learning about a prospect requires sellers to visit multiple sources, determine what information is valuable, then compile all that research into a thoughtful, personalized message. That's a lot of work — and it's easy to see how sellers might skimp on the details or risk burnout.

LeadIQ solves this problem by performing all the research and instantly compiling it in one place. The platform even organizes

Tailor messages based on insights

Once users have relevant information at their fingertips, they can tailor a message that speaks to their audience. Once again our platform helps by singling out the most relevant insights and helping craft them into a compelling message.

All of this is accomplished with the help of AI, boiling down time spent on writing a message to a matter of minutes, if not seconds.

Keep reps on message with value props

When reaching out to hundreds of prospects, it's easy to get your wires crossed on what you're trying to convey. Keeping reps on track is easy with the assistance of shared and approved value props that are automatically generated through AI.

Given that extra time and clarity, reps have greater opportunity to multi-thread and work accounts.

LeadIQ Scribe

Effortlessly craft on-point, personalized messages using AI

Scribe generates messages directly in Outreach, Salesloft, or Gmail using the LeadIQ extension. Simply input your prospect's email address or LinkedIn URL, choose a pre-built value proposition, and select up to three insights to personalize the message. After that, Scribe generates three distinct emails and subject lines.

This rocks for more reasons than one. You can craft complete, well-written messages from scratch, saying goodbye to flimsy templates and surface-level personalization. The insights are tied to your value prop, ensuring each message resonates with a prospect.

But most importantly (from a workflow perspective), Scribe integrates directly into your tech stack, allowing you to get a prospect directly into a sequence.

Scribe makes it possible for everyone to be a great prospector, no matter how good they are at personalizing emails. It boosts your top performers, and speeds up the onboarding process for new reps so they can get straight to work building more pipeline.

Your sellers can be great writers too

- Write pitch-perfect, cold emails in a matter of seconds.
- Uncover personalization insights that can not only be used to generate messages, but be used to better understand a buyers needs and pain points.
- Work directly within the sales engagement tools you already use, or use our web app. The choice is yours!
- Prospect like a rockstar, no matter who you are.

The screenshot displays the LeadIQ Scribe interface, which is used for generating personalized messages. It features several key components:

- Message 1:** A preview of a generated message: "Hi Michael - Saw the article about Paper raising a \$30 million Series B round. Seems like a great opportunity to grow your business and expand your reach! As a regional manager, I'm sure you..."
- Recipient Info:** A section for inputting prospect details, including Name (Michael Scott), Title (Regional Manager), Company Name (Paper Co), Location (New York City), and LinkedIn URL (https://www.linkedin.com/in/juliantong/).
- Select Value Proposition:** A dropdown menu showing "DO - High level overview" as the selected option.
- Description:** A text area providing context for the value proposition: "Some things that also translate well for hitting quota is equipping your sales teams with the ability to increase the quality and quantity of their outreach..."
- All Insights:** A section for selecting personalization insights, with tabs for "About Michael", "LinkedIn", "Company Facts", "News", "Job Postings", "Financials", "Twitter", and "Freeform".
- Subject Line 1:** A preview of a generated subject line: "What's next after your series B round".
- Subject Line 2:** A preview of another generated subject line: "The Gettysburg Address at Cornell Uni".
- Message 2:** A preview of a second generated message: "Hi Michael I noticed you university. I ch Rare ry has one of When it nuscripts,".

Amplify your team

Working with LeadIQ makes your team more powerful. It maximizes their time and effort, leading to higher productivity levels. The platform as a whole allows teams to do more with less. LeadIQ's ability to personalize at scale also amplifies its efficacy and results.

Establish territories and boundaries

Reps need to know the parameters of their outreach. Otherwise, they risk wasting time prospecting the wrong people or — even worse — compliance and legal issues if they capture and prospect leads in countries that are off limits.

LeadIQ's platform allows admins to control what countries reps capture contact data from. This creates internal alignment and a smooth, safe, workflow that empowers teams.

Ensure data governance

Not all data providers allow you to set customized guardrails. Without that control, it's possible to run into all sorts of issues.

LeadIQ solves this problem by granting admins granular privacy control that allow them to meet internal guidelines, while staying flexible to adapt to future needs.

Minimize time spent on manual tasks

When reps have fewer clicks, fewer tabs, and spend less time manually entering information, they're free to spend that time more productively. They can work more accounts at a time, prospect more contacts within those accounts, make more cold calls, and spend more time personalizing emails.

It's almost as if the efficiencies you gain with LeadIQ add up to having extra SDRs on staff.

LeadIQ Refresh

Enrich contacts and prevent data decay

Refresh makes it possible to maintain up-to-date Salesforce data. It helps users eliminate incomplete and outdated records, while also granting them a complete data picture by enriching records with 40+ firmographic data points including company location, employee count, revenue, and more.

This capability holds several benefits. It accelerates speed to lead for more pipeline. Inbound leads are instantly enhanced so workflows and routing work faster. Refresh can also help reps identify new opportunities as companies grow and change to fit your ideal customer profile.

When reps have hold of the right data, they're better equipped to succeed. It's as simple as that.

Why Refresh makes a difference

- Sales conversations benefit, as reps can reach the right people with the right message.
- Better territory management and analysis that allows users to identify new hotspot geographics, industries, and more.
- Time savings from more accurate outreach can be reinvested in other quality prospecting tasks.

leadIQ Refresh

LeadIQ Setup

Leads

Accounts

Contacts

LeadIQ Transaction Logs

Field Mappings Instant Enrichment Schedule Enrichment

Configure Field - Mappings For Enrichments

LeadIQ Fields	Salesforce Fields	☒ Enrich	☐ Always Override
Company Id		☒	☐
Company Name		☒	☐
Company Domain		☒	☐
Company Description		☒	☐
Industry		☒	☐
Email Domain		☒	☐
Type		☒	☐
Phone		☒	
Company Address		☒	

Now what?

Get prospecting!

At LeadIQ, we believe the best and most effective prospecting workflow will enable your sellers to identify the right prospects, capture their contact information, know the right time to reach out, and be able to compose messaging that resonates, all within the tools they already use every day.

Working together with tools like LinkedIn Sales Navigator, Outreach, Salesloft, Hubspot, and Gong, you can create a modern workflow that gives SDRs time in their day to focus on building genuine relationships and becoming the guide your buyers need and trust along their journey.

Explore our full prospecting platform and book a demo at [leadIQ.com](https://www.leadIQ.com).



Identify prospect data

Find, capture, and sync contact data to your system of record faster.



Compose personal messages

Identify the right time to reach out to key accounts and buyers for warmer outreach.



Track sales triggers

Generate tailored, complete sales messages in seconds — and stand above your competition.

