

An Overview of Outreach.io and how sales can best use it

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Sales engagement software helps businesses streamline their sales process using tools, sales messaging management, and task and workflow automation. If your organization is looking for a way to combine its sales and marketing efforts to create automated, personalized sales journeys, a sales engagement platform is the way to do it.

3D2B is now an Outreach reseller, offering clients this innovative automation platform that eliminates repetitive tasks and busy work for sales representatives and other sales professionals, including business developers, inside sales, and sales management teams.

This post takes a closer look at what Outreach can do for your organization.

What is Outreach?

Outreach is a leading sales engagement platform that uses machine learning to help companies accelerate growth by optimizing every customer lifecycle interaction across email, voice, and social. And it does it while still meeting rigorous EU data security and data privacy requirements as supported by key independent third-party certifications.

Over 5,500 companies, including Zoom, SAP, Adobe, and DocuSign use Outreach to power their revenue organizations, and tens of thousands of sales reps use the platform.

How Sales Teams Can Leverage Outreach to Manage Customers and Grow

Outreach helps businesses of all sizes:

- Increase sales development rep work by up to three times.
- Collect data to test prospect messaging effectiveness.
- Keep sales teams on track using best practices and processes.

Here's what you can expect to achieve by using the Outreach platform.

1. Reach the Right Prospects at the Right Time

Outreach helps sales development reps make faster, more effective engagements, improve scheduling, and optimize coaching efforts. Sales reps can plan their strategy, or sales sequence, on a per-client basis.

For instance, a sales rep can:

- Send an email to a new prospect one day.
- Follow through with an InMail the next day.
- Send the prospect a follow-up text a day or two after that.

The platform makes these sequences simple to follow and easy to use. It also uses AI and ML-powered insights to suggest reps pause a sequence based on prospect behaviors. The result? More pipeline with less effort.

2. Track Critical Metrics

Tracking the right metrics helps you expedite growth and profitability. It also helps your sales team tell your brand's story correctly, maintain insight into operations and performance, uncover and resolve issues, and replicate wins.

- **Sales activity metrics** like number of leads created, number of emails sent, and number of meetings scheduled reflect your team's behavior progress and let you see how individual efforts contribute to the team's overall success.
- **Sales pipeline metrics** give insight into how deals are progressing and any issues that might be holding things up. Typical metrics include number of qualified leads, average deal size, average sales cycle length, pipeline coverage, and deal slippage.
- **Sales lead generation metrics** like cost per lead, conversion rate, and average lead response time help improve sales and marketing alignment, ensuring both teams are working toward the same goals.
- **Sales productivity metrics** that track and help improve a rep's efficiency and productivity include time spent on selling activities and manual data entry, as well as average number of sales tools used daily.

3. Easy Integration with Existing Software

Outreach integrates with other tools your business uses, making it easy to resolve data conflicts, track activities, and update information across platforms. By linking with your company data and CRM, it can also automatically identify when leads are converted and then use automation to remap interactions with the new customer. Sales teams love this feature, as it allows them to work within existing tools they're already familiar with.

4. Improved Productivity

Outreach's task management feature is one of the software's most highly rated by those who use it. Manual, repetitive, and often boring tasks are automated, giving sales team members more time to devote to tasks that support your business goals.

It can:

- Automatically update records across multiple databases.
- Flag potential leads.
- Move people to new sequences.

- Speed up the sales process.

5. Automation & Personalization

Sales teams no longer need to manually personalize emails daily. Instead, they can create templates that are automatically filled with relevant data, cutting down the time spent on email generation by up to 90 percent. And because Outreach scales easily with databases and other elements, there are no spreadsheets or other systems you need to create or track.

6. Custom Targeting & Sequencing

Outreach's use of multiple data sets and updated customer information makes it a great tool for building custom targets and giving them their own sequence. You can use the software to automate email, prompt teams to send emails manually, or assign individual team members tasks like phone calls or other outreach strategies.

You can also:

- Customize sequences to occur at specific intervals.
- Assign dates to each step.
- Save sequence information and reuse elements for future work.
- Revenue Forecasting

Outreach automates forecast preparation, so you get a consistent view across your entire organization. Instead of spending hours creating forecasts, sales professionals can focus on what they do best: selling. Scenario planning tools help you see how changes in factors like pipeline volume, sales velocity, and win rates impact your forecast. And you can leverage historical performance to pivot sales strategies.

3D2B and Outreach, the right choice for you! Outreach is an effective tool for anyone in sales but is specifically designed to meet the needs of:

- Sales development reps
- Closing reps
- Customer success managers
- Sales management and leadership
- Sales operation
- Marketing teams

As the largest and fastest-growing sales execution platform provider, Outreach can help your organization dramatically increase productivity and drive smarter engagement with prospects and customers. To learn more, book a consultation with 3D2B today to discuss how an AI-driven sales engagement solution like Outreach can deliver everything you need to build customer relationships and increase revenue.

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