THE GUIDE TO

Buckets

It's easy to waste time on the wrong prospecting activities. There are lots of moving parts, and it can be very difficult to effectively manage your time. We use a technique called "buckets." This is how we ensure that we're always maximizing our prospecting time. This guide will show you how each bucket works.

BUCKET 1 - UNCONTACTED

These are people you’ve never spoken with, including both cold outbound leads and new inbound leads who have yet to be researched.

PRIMARY BUCKET 1 ACTIVITIES:

- Removing any accounts outside your swimlane
- Attempting to contact leads via phone, email, and social media
- Performing additional research or preparation

This is the most important bucket in the entire process.

Garbage In = Garbage out.

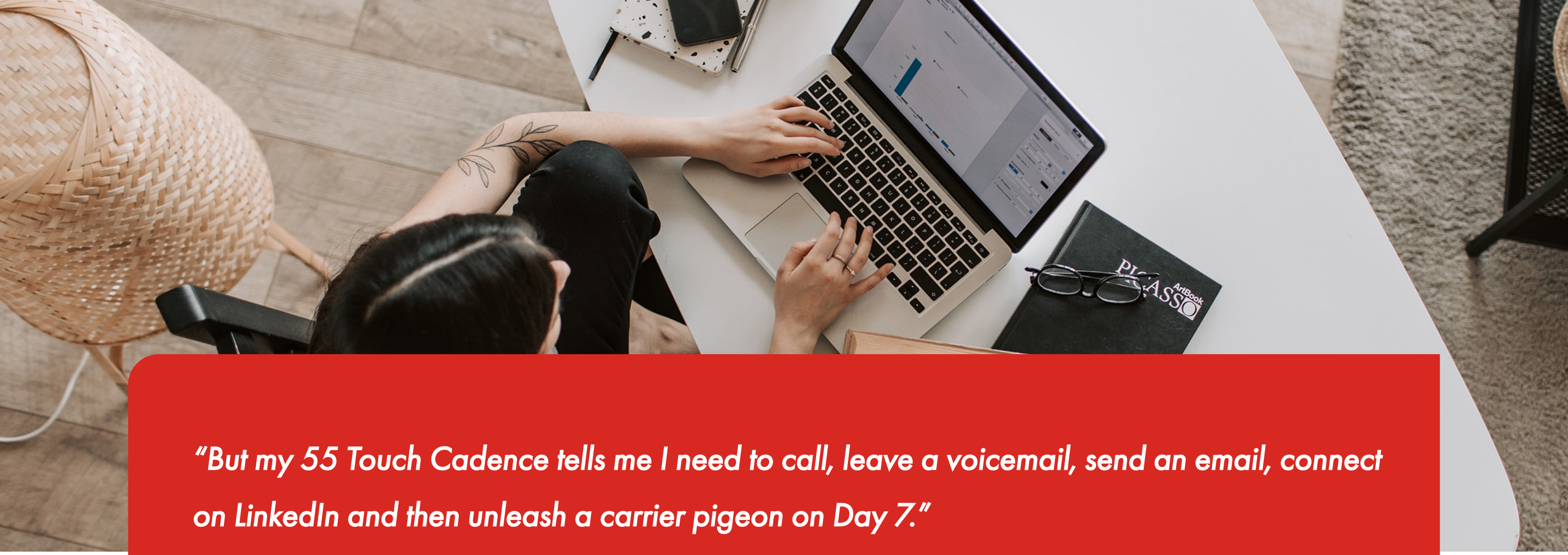
As we move leads from Uncontacted to Working, we will work leads through the phone validation process.

Sales professionals should always be prospecting for new business using any channel available to engage and start new conversations with their next best customers.

The challenge is that most prospecting lists, whether generated from an internal CRM, provided by marketing, created via manual research, or purchased from a data vendor, have a poor dial-to-connect rate and lots of bad or out-of-date contact information.

Reps spend a lot of time calling leads who never pick up the phone, send emails that are never opened, or waste hours on social media looking at profiles of prospects who are not active.

It is impossible to know who answers the phone, who opens emails or who is active on social media until we work the validation process moving leads either forward to bucket 2 or remove them from our list.



"But my 55 Touch Cadence tells me I need to call, leave a voicemail, send an email, connect on LinkedIn and then unleash a carrier pigeon on Day 7."

This is where sales engagement platforms or "Sequencers" get it wrong. Hours are wasted completing or skipping tasks in channels without validated paths to meaningful conversations.

Each lead and every phone number should be attempted by a human and segmented into Phone Ready Leads™, Validated, Not Validated, or Bad.

Emails should be tested for deliverability and should not include any personalization until you know a lead opens emails.

Social media engagement should only happen with leads who are actively using social media.

Top sales professionals understand that more conversations with targeted buyers equals more sales. Getting those conversations takes a lot of dials, emails and social outreach — often as many as 30 dials and more than 1 hour to earn 1 meaningful conversation.

Prioritizing phone numbers in the Phone Ready Leads™ buckets, sending personalized emails to only leads who have recently opened an email, and spending time on social media profiles who are actually active and avoiding those in the Bad buckets saves time, labor costs, and frustration.

This simple change in focused and prioritized outreach at the very top of your funnel can more than double the number of quality meaningful conversations you are able to start every day. This translates directly into more completions, referrals, meetings and follow-up opportunities — the lifeblood of any sales team.

BUCKET 2 - WORKING

These leads were researched and ran through the validation process in Bucket 1 and already have at least one outbound call attempt. A validated dial is when you can confirm that the number associated with that person actually reaches them.

For full-time appointment setters, this bucket should consistently hold at least 100 validated leads so you have enough people to contact regularly. For full-cycle sales reps or closers trying to supplement their pipeline, this bucket shouldn't drop below 50 leads.

PRIMARY BUCKET 2 ACTIVITIES:

- Calling regularly (as often as multiple times daily) to make contact
- Documenting phone tree path on first attempt (e.g. "Dial 1, then 314, then 1")
- Continuing with other outreach (email, social, etc.)

BUCKET 3 - PRIORITY

These are the prospects who meet any of the following criteria:

- You spoke with them but couldn't schedule a meeting.
- They engaged heavily with your email outreach in Bucket 2, but never replied.
- They are in your swim lane and attended a webinar, event or recently engaged with any of your content.
- They're an inbound lead and are in your swim lane.
- They were once in your deal pipeline but failed to close over the last 6-9 months.

The only activity in this bucket is continuing with outreach via phone, email, and social to schedule an appointment.

BUCKET 4 - SCHEDULED

This bucket consists of all upcoming appointments you have scheduled. These prospects are where the money comes from, so you have to watch this bucket like a hawk to ensure that they show up for the meeting.

PRIMARY BUCKET 4 ACTIVITIES:

- Confirming any appointments scheduled 1 or more weeks out, during the week the appointment is due
- Confirming all appointments within 12-24 hours via email
- Calling to confirm 2-3 hours before the scheduled time if the prospect doesn't respond to final email confirmation

If your prospect misses the appointment, they go back to Bucket 3 until their appointment is rescheduled.

In order to optimize your effectiveness, you work the bucket system in reverse.

HERE'S A TYPICAL WORKFLOW:

Bucket 4: Call to confirm any appointments due in the next 2-3 hours not yet confirmed via email.
Bucket 4: Confirm any appointments due in the next 24 hours via email.
Bucket 4: Confirm any appointments set more than 1 week out that are due this week.
Bucket 3: Contact anyone you've already spoken with who's asked to be contacted today.
Bucket 3: Call through the remaining leads in this bucket.
Bucket 2: Call through the entire list in this bucket.
Bucket 1: Call through any leads you've already researched.
Bucket 1: Research all brand new leads to ensure they're in your swimlane.

If the only prospecting you do today is confirming tomorrow's appointments, you're much better off than if you had started by sending cold emails to brand-new leads in Bucket 1.

Priority follow ups rule of thumb: Always cut any stated follow up request date in half and never wait longer than one quarter for follow ups. For example, if a lead asks you to follow up with them next month, set your follow up date for 2 weeks out. If they ask you to follow up in 2 weeks, set your follow up date for 1 week out. And if they ask you to follow up in Q4 and it is currently Q1, set your follow up date for Q2.

Business changes rapidly and if you are not connecting with your leads at least every quarter you do not have a lead and you might as well kick it back to marketing for nurture.