

Using trigger
events for
outbound
sales

What are trigger events?

Any change in a company data point or mention in any document can act as a trigger that leads to an automated action in a workflow.

Trigger events indicate an opportunity for you as a salesperson to reach out to a prospect, and do it, at the right time and with the right angle.



Why use triggers events

Companies are living organisms: always in flux. They expand, they merge, they hire new people, increase revenue, or simply move offices. Any of these events can trigger a need for a product or service on their end.

When you reach out to a prospect based on a trigger, you have all the information you need to deliver a tailored offer. The person you're talking should not doubt why you're reaching out to them now and why you consider them to be a good fit for your offering.

Use triggers to:

- Find the best prospects.
- Prioritize the right companies.
- Carry out smarter conversations.
- Find the right timing.

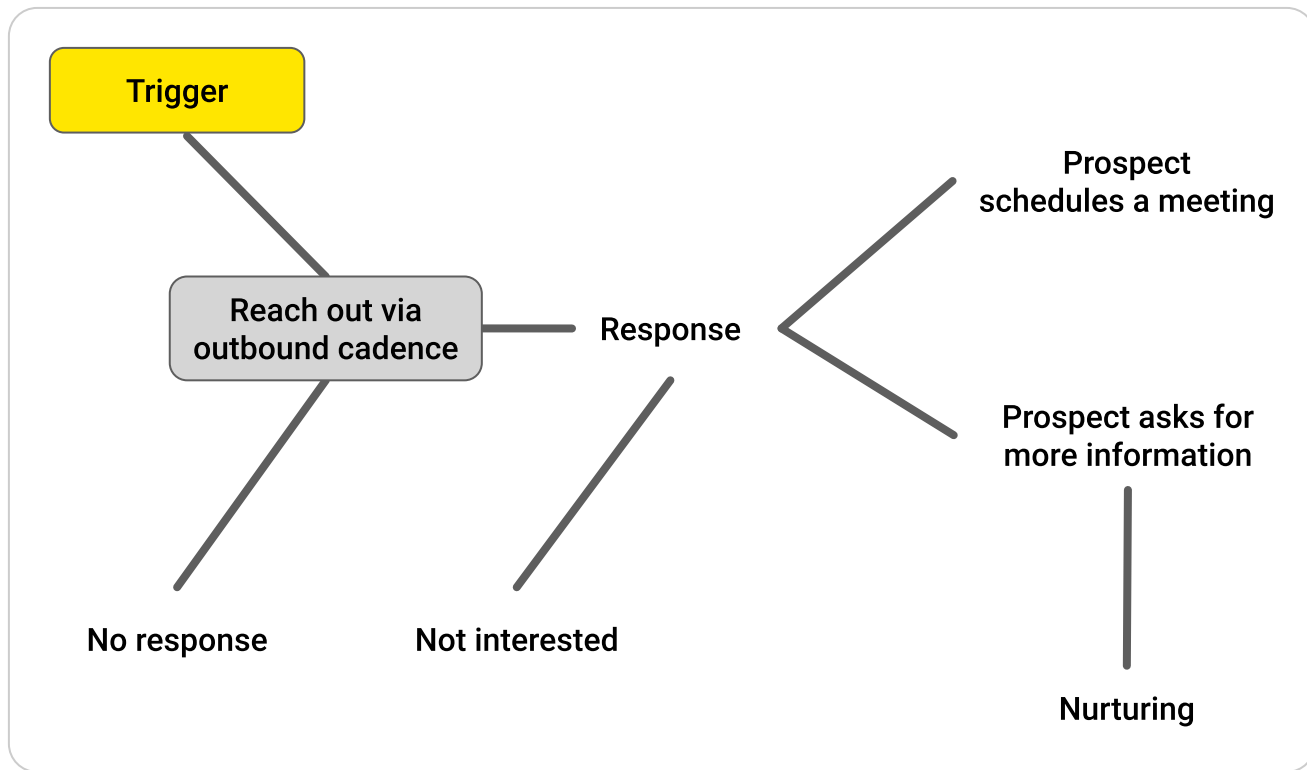


Use cases

1. Automatically add new accounts to your target lists as soon as they meet certain criteria (for example, your ideal customer profile).
2. Initiate bespoke marketing campaigns and tailored sales pitches any time a relevant change at a company's end occurs (for example, a company registers an auxiliary name).
3. Keep your databases fresh and updated by tracking any changes in a particular data point in a selected group of companies (for example, your CRM is updated whenever one of your customers relocates its corporate headquarters).



What to do when an outbound trigger event occurs



Prepare a solid plan to act quickly as soon as an outbound trigger event occurs, preferably within 24 hours from when you receive a lead.



Adapt your pitch to the trigger

Here's an example.

Predefine your messaging according to each trigger.

Be relevant—There's a reason you're reaching out.

Trigger: New Sales Director

Reason to reach out

Congratulations on your new role as a Sales Director!

I follow COMPANYNAME and noticed that you started as a Sales director.

We know your first 90 days are critical in setting the team up for success.

We've helped people in similar situations build up their sales process from scratch, and would love to show you how we can help in practice.

Pitch

We've met thousands of sales directors in the past five years and we can confidently say we know a thing or two about how to set a sales team up. At Vainu, we excel at using actionable company information to improve sales quality and results. That's what we call real-time sales.

Share content

For example, here's a piece we've written based on the discussions and collaborations, including a template to create your own sales playbook: <https://www.vainu.com/blog/sales-playbook/>

Next Steps

I'll call you *TIMEFRAME* again to see if we could discuss this further.



Which triggers to look for?

Any change in any data point can be a trigger. To get started, look closer at your existing customers: What happened in their organizations before they became customers? Depending on the services you provide, the triggers you're looking for will change accordingly.

Next, you'll find a list of the most common triggers you can follow in Vainu. Pick out what you think will work for you!



Trigger: Changes in management

Definition

Someone in a key leadership position has either left the company, or a new manager is appointed.

Desired action:

Send an email

Destination:

Inbox

What it indicates

New leaders will typically aim to leave their mark on the organization as quickly as possible.

This often means hiring new team members, evaluating existing processes and investing in new ventures to achieve the desired impact.

What to say

Congratulate them on the role, and highlight how your services help decision-makers in their first 90 days.



Trigger: Expanding the business

Definition

A company expands their business either geographically, or through new product lines or services.

Desired action:
Create a lead

Destination:
CRM

What it indicates

Succeeding in expansion requires a lot of new skills and capabilities, and that acquiring those capabilities requires investment.

Expect new investments into everything required to enable the expansion: consulting, people, legal, technology, you name it.

What to say

Congratulate them on the new venture, and share your insight on how to succeed in a critical part of the launch (along with how your offering fits in with this).



Trigger: Mergers and acquisitions

Definition

Transactions where the ownership of companies or their units are transferred or consolidated.

Desired action:

Create a task

Destination:

CRM

What it indicates

When joining forces, companies are forced to adapt to the new co-existence. This often means evaluating all the existing aspects of the business and deciding on what to cut down on and where to invest further.

What to say

Ask how the new circumstances will impact how business is done, and share any relevant resources on how you've helped companies during times of transition.



Trigger:

New web domain registered

Definition

A company registers a new web domain with the local authorities.

Desired action:

Update data

Destination:

CRM, Marketing automation platform

What it indicates

A new web domain could indicate the launch of a new product or service, a rebranding, or some other strategic project.

It's usually an early indicator of something marketing-related coming out soon.

What to say

Once you understand the reason for the new site, express excitement for the new venture and share any feedback or tips with the new initiative.

When pitching, explain how you can help with the objectives of the campaign in question.



Trigger: Layoffs

Definition

Temporary or permanent unemployment of company staff.

Desired action:

Send an email

Destination:

Inbox

What it indicates

The company is looking to create savings, either across the business or in certain areas.

While it's often an indication of rough times ahead, it can also suggest a new direction.

What to say

Offer resources in how to navigate through the tougher times, and come out on the other side stronger than ever.

Highlight how you've facilitated that change with customers in the past.



Trigger:

New financial statement

Definition

The company has filed a new financial statement with the government, made publicly available.

Desired action:

Update data

Destination:

CRM

What it indicates

The financial statement will show you everything you need to know about the company's trajectory: are they growing, are they profitable, do they have a comfortable cash position, and so on.

For some companies, key initiatives will also be listed in writing.

What to say

Tailor your message to the objectives related to the financial position they're experiencing: if they're growing, explain how you can help them grow faster. If the company is burning cash, explain how you can help them cut costs.



Trigger:

Changes in hiring volume

Definition

The number of open positions at the company has significantly increased over the past few months.

Desired action:

Create a task

Destination:

CRM

What it indicates

Upswings in hiring volume are a great indication of the increased importance of a certain department, or the overall growth trajectory of a company. The more a company is hiring, the more likely they will be to expand (and likely invest even further).

What to say

Acknowledge the growth and share resources on how to successfully onboard new hires, get the most out of the team and tackle any growth-related challenges, positioning your offering in the process.



Trigger: Changes in tech stack

Definition

The company has adopted a new technology or switched vendors—either one particular of interest, or any from a category of software.

Desired action:

Launch targeted ad campaign

Destination:

Marketing platform

What it indicates

New technology suggests increased interest in the topic, and often presents needs in using the tool.

For example, a marketing automation platform will likely lead to an increased need in content to help with conversions.

What to say

Mention your understanding of their tech stack and the challenges associated with using the tool, along with your tips on how to succeed.

Associate your product with the key metric that tool aims to increase.



Trigger: New funding

Definition

The company gets a new round of funding—either from investors or from public procurement.

Desired action:

Create an opportunity

Destination:

CRM

What it indicates

When companies receive additional funding you know they're positioned to grow and scale.

They might be looking to improve their tech stack, add headcount, or open new offices.

What to say

Offer your help and experience to make sure they use that funding to the best of their capability. Show how your offering can really prove a return on investment for their investors.



Use case template: [Select trigger event]

Definition

[What happened in the organization]

Desired action

[Choose the action that this event triggers]

Destination

[The platform where a workflow is initiated]

What it indicates

[The reasons why the prospect more likely to purchase now]

What to say

[Adapt your pitch to what happened in the organization]

[Select relevant content to share]



How to monitor trigger events

Industry news, company websites, social media, and company registers are traditional sources of buying signal information.

You can automate this process by tapping into sales intelligence tools. This technology works around the clock to collect and make sense of company information from millions of data sources.

Today, in a sales intelligence like Vainu you can track and monitor any data point. When a change in a specific data point occurs, users get alerted of company changes that can open up a window of opportunity for them within one of their target accounts.

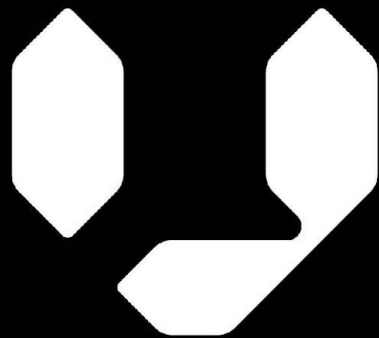
Connect your CRM to a sales intelligence platform to automatically create tasks and workflows based on triggers.



Additional resources

- [Real-Time Sales: The Future of B2B Sales eBook](#)
- [The 100 Best Sales Tools](#)
- [Sales Playbook template](#)
- [Don't Blame the CRM! How to sell more with company insights eBook](#)





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