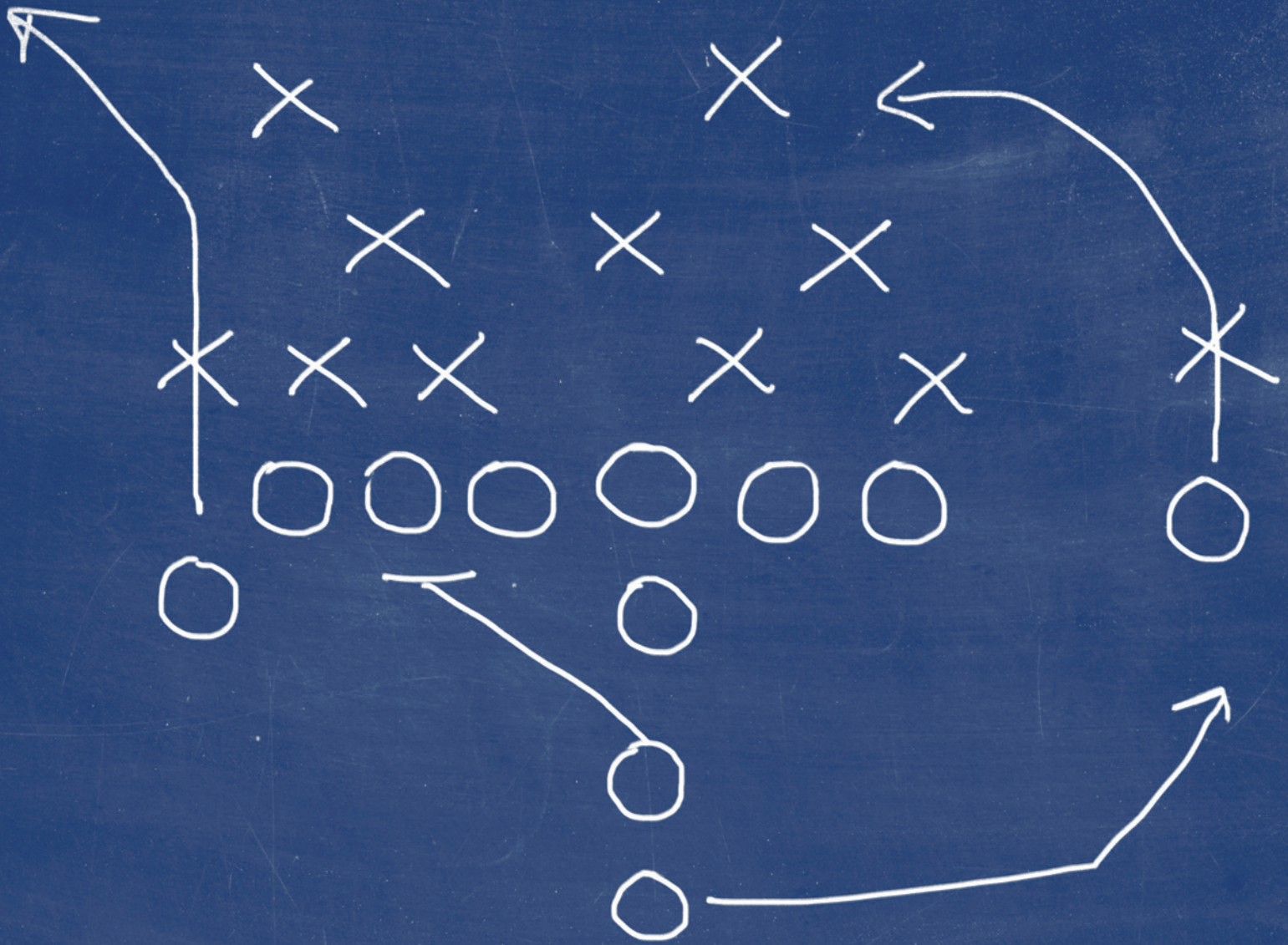


# Playbook



**artesian**<sup>TM</sup>

Turning insights into sales opportunities

The world of B2B sales has changed. Social media, mobile, and digital resources have helped business buyers become significantly better informed, connected and, ultimately, more in control.

Buyers use these digital resources to progress over halfway through their decision-making process before they even contact a seller. What they want when they do pick up the phone is for you to listen to their situation, understand their pains and offer a tailored solution.

Sales professionals are responding to the digital buyer by combining the traditional relationship-building approach with new digital technologies and information.

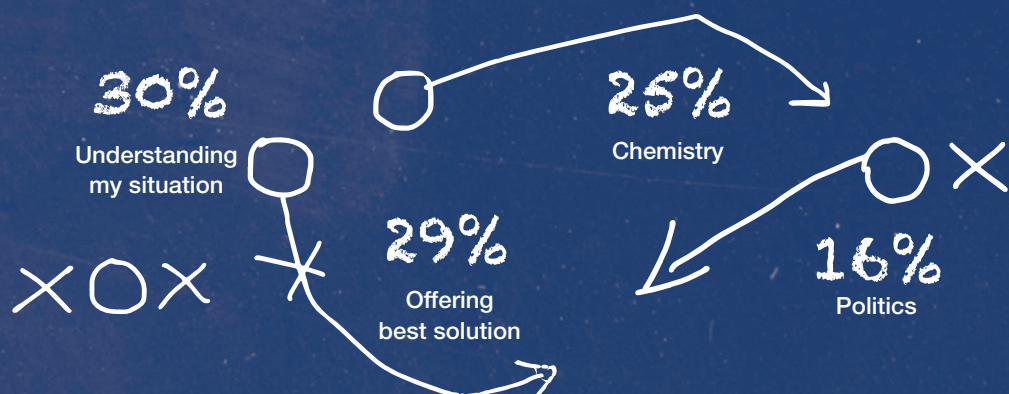
And they are reaching successful commercial outcomes by using professional social networks such as Twitter and LinkedIn to find customers, listen to their evolving needs, relate to their challenges, and engage them in conversations.

Sellers who have embraced this change and formed new habits reported that they were **26% more competitive** on average, according to our latest customer survey<sup>1</sup>.

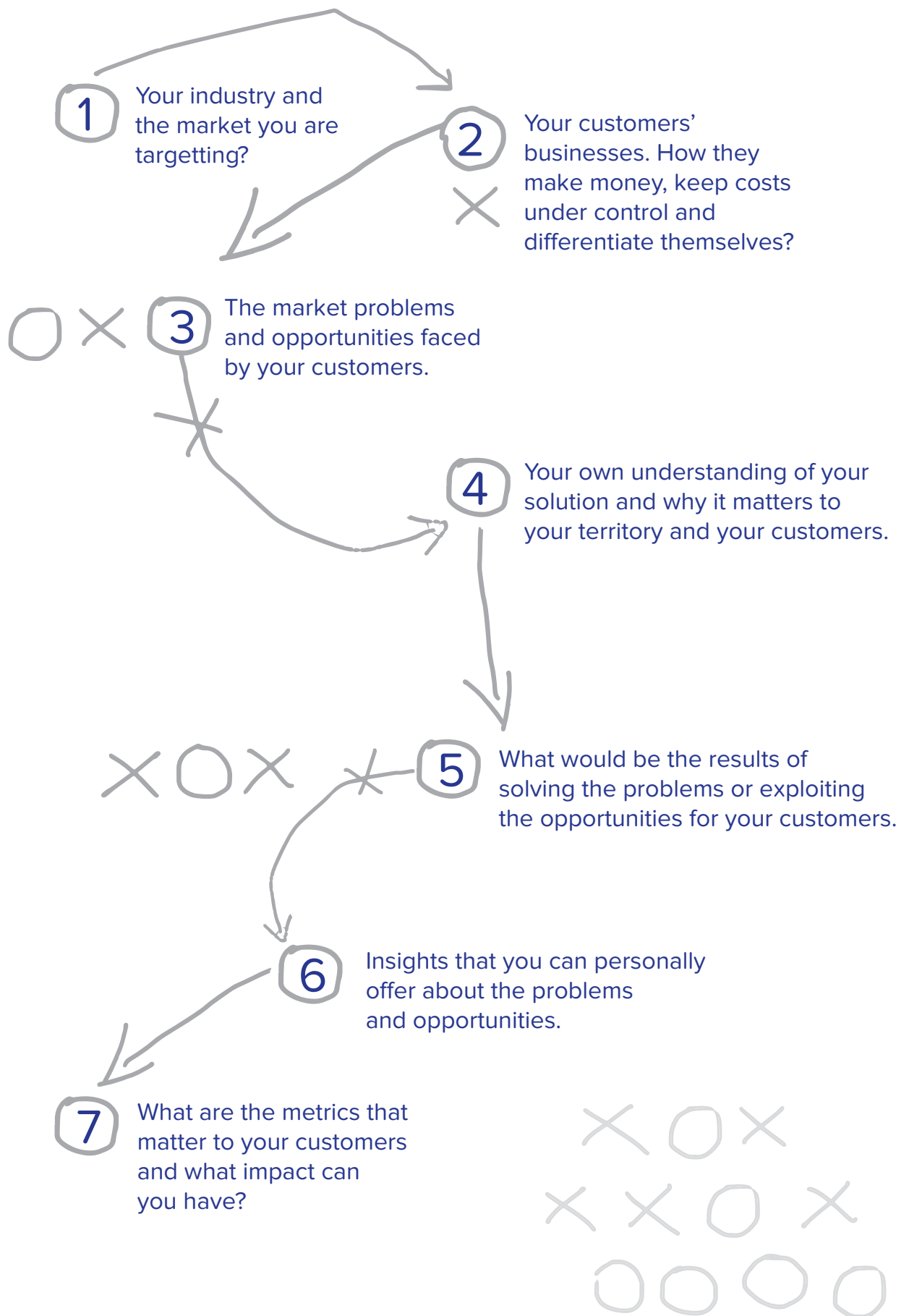
But there's a gap between information and action that only you can traverse.

Turning insights into positive sales behaviours is not always obvious – but when you get the hang of spotting sales triggers and turning them into insights, you will quickly reap the rewards.

## Key factors in the customer buying decision:



# The 7 things to research:



## Sales Triggers to Spot

Behaviours are almost infinite in variety, but the sales triggers they represent aren't. This playbook will outline all of the major triggers you should be looking out for, what they mean, and how to convert them into actionable insights.

### Click on any trigger to jump to that play...

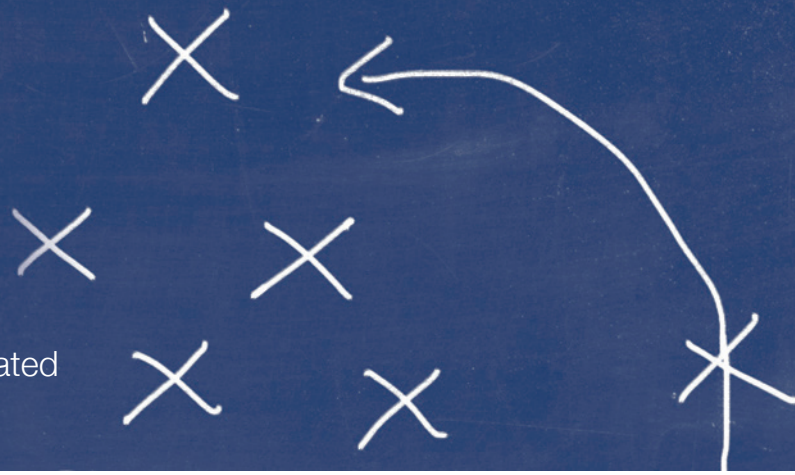
Trigger #1	New Executives and New Critical Positions Created
Trigger #2	New Job or Role for Current Contact
Trigger #3	Large Customer Announcement
Trigger #4	Company Expansion or Relocation
Trigger #5	New Product or Service Announcement
Trigger #6	Competitive Product/Move
Trigger #7	Dissatisfaction with Current Vendor
Trigger #8	Good/Bad Quarter
Trigger #9	Mergers and Acquisitions
Trigger #10	Legal Problems
Trigger #11	Significant Changes in Hiring Velocity
Trigger #12	New Organisational Strategy/Initiatives
Trigger #13	Buyer Opens Your Email
Trigger #14	New Legislation
Trigger #15	Change in Price/Availability of Essential Resources/Materials
Trigger #16	Winning an Award
Trigger #17	Evidence of Interest
Trigger #18	Analyst Report Released
Trigger #19	Additional Funding/IPO
Trigger #20	Press Coverage – Event Announcement
Trigger #21	Entering Into a New Market/Market Development

“ The key to success is not the information it provides but how we are using that information to enhance relationships ”



# Trigger #1

New Executives and New Critical Positions Created



C-suite executives have ample authority to shake things up and, if they're new, they'll be keen to prove their value quickly. If it's a completely new and critical position then they won't be restricted by established traditions, so they'll be much more open to fresh ideas than most business leaders.

Either way – it's a perfect time for you to pitch.

It's not just executive leadership shifts you need to watch out for – new roles can signal new strategies. New departments need to buy new tools, processes, and support, and they have much more leeway. Get in on the ground floor.

Spotting this trigger using Artesian:

- Read the prospect's latest News in *Watchlist News*, or click on the company name
- Check the topic cloud to identify management changes in *Watchlist News* or in the *Company News* tab
- Click on the *People* tab to identify key individuals and use the launch buttons to view them from your LinkedIn profile
- Use the *People* tab to identify key roles and other directorships
- Check the *Social Media* tab for latest updates and look to follow the individual on Twitter
- Share the article in Artesian and track if the recipient has opened it in *Your Influence*



## Trigger #2

New Job or Role for Current Contact

The only person more likely to buy than an interested and engaged prospect is a customer who is already delighted with your product or service.

If a satisfied customer assumes a different position in their company or moves to a new organisation, reach out to them and see if they'd like to bring your product or service along for the ride.

If your offering made them look good in their last role, they'll be eager to spread the gospel in their new one.

Spotting this trigger using Artesian:

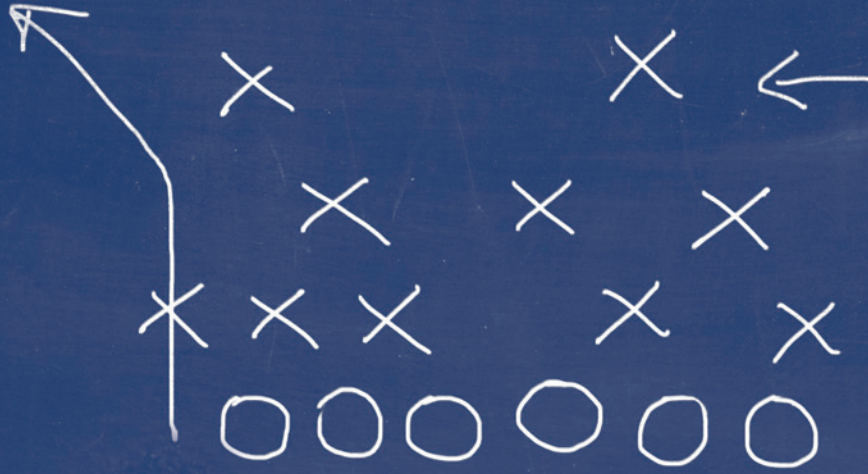
- Set up *Email Alerts* to fire when a customer posts new job information
- Read the latest News in *Watchlist News*, or click on the company name
- Follow the customer's new company in Artesian for the latest news
- Track the new company's competitors
- Check *Social Media* for latest Blogs/Tweets
- Use *Market News* to understand the new company's position within the sector
- Share insight with them and track if they have opened your message in *Your Influence*

“The time to build relationships is before you need them. When you need those relationships, it's too late to start building them”

*Anthony Iannarino, International speaker, author and sales leader*

# Trigger #3

Large Customer Announcement



If your prospect has just landed a significant account, they're about to have a lot more money rolling in. They may also need to expand the level or range of services they buy from you in order to fulfil the account.

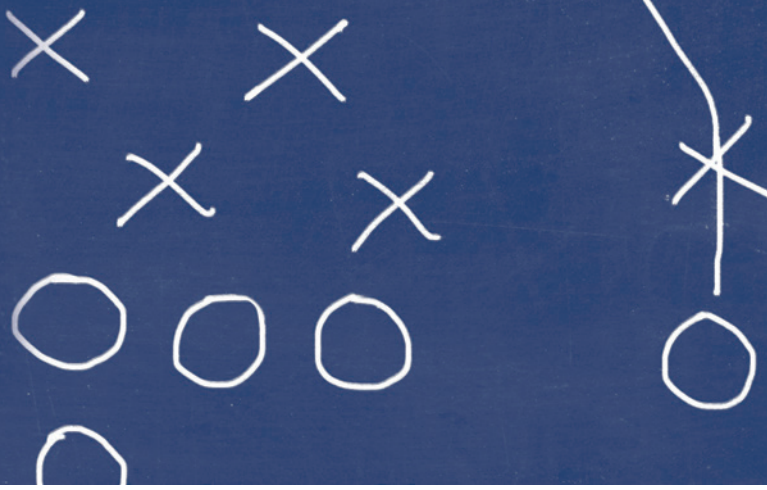
Time to give them a call and congratulate them...and to reach out with a suggestion on how to burn some of that cash on scaling up their services.

Spotting this trigger using Artesian:

- Click on the company name for recent press releases
- Track Financial Changes in *Company Info/Data Changes*
- Check the company's latest *Social Media*
- Use *Prospector* to identify new opportunities for your prospect
- Follow your prospect's new account to alert them to any significant developments

# Trigger #4

## Company Expansion or Relocation



Whether they're opening new offices, expanding their current office, or even relocating, they'll need a glut of new supplies and services. If they are already a customer, they may need to expand their resources to keep up with their growth objectives.

Depending on your product or service, this can be a primary upsell or introduction opportunity. Sending an office-warming gift or branded stationary to open lines of communication can be followed up with a call or email. They might even offer you the chance to stop by and see your gift in person.

Spotting this trigger using Artesian:

- Artesian *Email Alerts* will flag this opportunity within your inbox
- Read the latest News in *Watchlist News*, or click on the company name to find out about anticipated moves
- Use *Prospector* to identify new prospects in the area for your client to go after

“ I read a client were opening a new site in Warrington, I saw in the article who the Commercial Director is. I sent him an email and got a response saying he will be in touch! ”







# Trigger #5

## New Product or Service Announcement

A new product or service roll-out is uncharted territory for any business, and uncharted territory calls for different types of support and potentially new vendors.

Find out as much as you can about the new product or service – the reason for the change, the supply chain involved, any new markets they're moving into, etc. – if you can help, get in touch.

Spotting this trigger using Artesian:

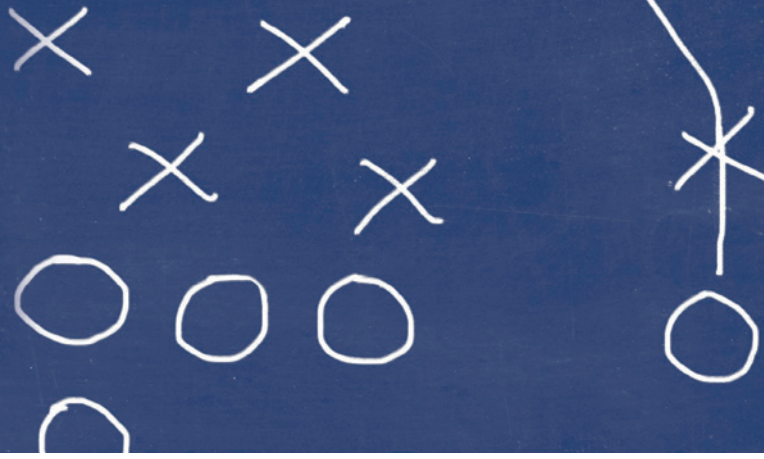
- Use *Market News* to identify sector headlines announcing new products
- Create Artesian *Email Alerts* to get updates to your inbox
- Read the latest News in *Watchlist News*, or click on the company name
- Check *Social Media* for latest Blogs/Tweets

“ Previously I would have had to visit 6 or 7 different sources for research. With information downloading in seconds via Artesian, it saves me a huge amount of time ”



# Trigger #6

## Competitive Product/Move



This includes any significant activity that falls outside the bounds of a product launch – a new marketing campaign, piece of advertising, customer win, or leadership change, for example. When one player moves, competitors won't be far behind.

Maybe a competitor beat your prospect to the punch with a new product announcement, or perhaps stole their thunder entirely. Either way, you can be sure that if a rival made a bold move, your prospect will be looking to make a bold response.

If you can help in that aim, your message will be welcome. Just make sure you are being specific in your communication – that way it is relevant to their activity, not a distraction.

Spotting this trigger using Artesian:

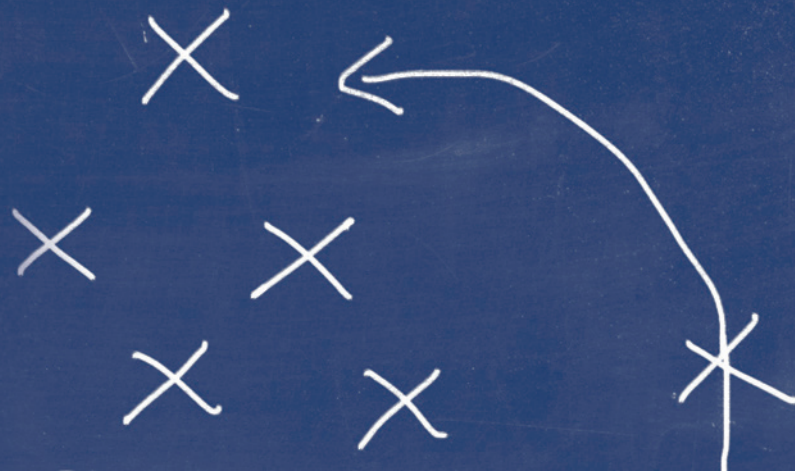
- Follow *Competitor* for key developments
- Follow *Industry Influencers*
- Create Artesian *Email Alerts*
- Read the latest News in *Watchlist News*, or click on the company name
- Use *Market News* to identify sector Headlines
- Check *Social Media* for latest Blogs/Tweets

“Helps you align what you are selling to what they need. Artesian brings you closer to your prospects so that we are the first point of call”

**sage**

# Trigger #7

## Dissatisfaction with Current Vendor



If your prospect is so kind as to announce openly that their current provider isn't working out, jump on the opportunity immediately. It's a prime opportunity to steal the business away from them.

Bear in mind that this trigger could present itself in forms other than a straightforward social media post; look for news articles or legal actions that speak to a souring relationship.

Say, for example, Company X post on Twitter apologising to its customers for downtime. This indicates that its vendor has delivered less-than-amazing service – something you'd be more than happy to rectify.

### Spotting this trigger using Artesian:

- Check *Social Media* for latest Blogs/Tweets
- Use the launch buttons in the *People* tab to view the prospect on your LinkedIn
- Check out the *Company Info* tab to view Company House Documents (UK only)
- Use *Market News* for the latest press releases
- Follow the company's current provider for any news
- Read the latest News in *Watchlist News*, or click on the company name

# Trigger #8

Good/Bad Quarter

Is the company's bank balance looking exceptionally healthy? If so, it will be more receptive to projects that could help the business continue down the path to success or accelerate its growth. Introduce yourself.

Or perhaps the company is losing money fast? Do you sell a product or service that could reverse the trend? Introduce yourself.

Spotting this trigger using Artesian:

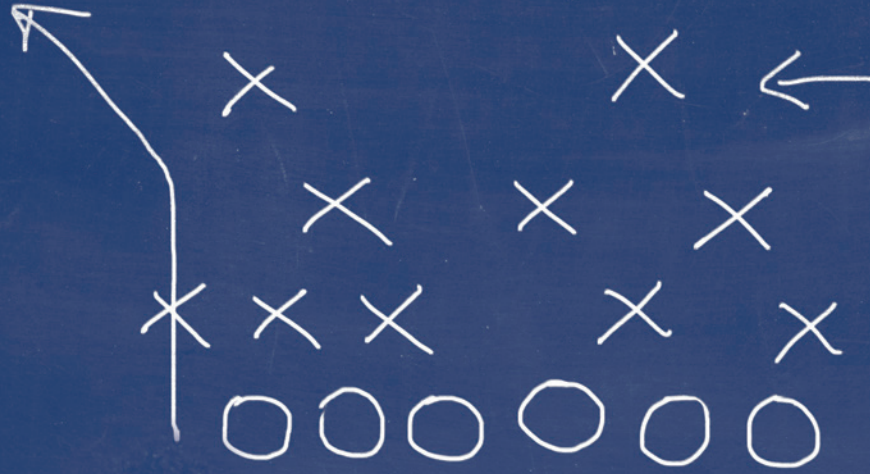
- Check *Company Info* for any financial changes
- Check *Company Info* for Annual Reports
- Create *Artesian Email Alerts*
- View *Company News* for latest annual reports
- View *Market News* for the latest press releases
- Check *Topic Cloud* for any new Management changes at C-Level

“ It's a really intelligent research and very sophisticated information gathering tool, which helps me build better relationships with key contacts ”

**SCOTTISH WIDOWS**

# Trigger #9

## Mergers and Acquisitions



The merger of two organisations is a golden chance to earn additional revenue. If one organisation is already a happy customer, they will be a great ambassador for you in the other organisation. They may simply need to scale up their service, licences, or product quantity to align the two companies. Either way, it should be a relatively easy sell.

To make your pitch as specific to their needs as possible, be sure to find out as much as you can about the new organisation, their processes, systems, and suppliers. Tailoring your pitch around this information helps solve their needs before they arise – a great way to impress your clients.

Spotting this trigger using Artesian:

- View *Market News* for the latest press releases
- Check *Social Media* for latest Blogs/Tweets
- Use the launch buttons to view the new company on LinkedIn
- Artesian alerts, press releases page, and industry news will help spot these signals

# Trigger #10

## Legal Problems

If a company gets penalised for compliance issues, it'll be looking for a product or service that can keep it out of trouble in the future.

An entertainment company, for example, may regularly have its IP stolen and distributed. If your security software can restrict movement of key files, then you have the perfect solution to the company's problems.

The salesperson who can swoop in to offer help amidst a disaster will look like a hero.

Spotting this trigger using Artesian:

- View *Market News* to identify key headlines
- Create *Artesian Email Alerts*
- Check Twitter for updates leaked by employees

“*Artesian ensures a joined up approach in terms of how the different teams hit an organisation based on a piece of news*”





# Trigger #11

## Significant Changes in Hiring Velocity

Whether the company is recruiting all the new talent it can get or making massive layoffs, any major shift in hiring can be a worthy trigger event – depending on what you sell, of course.

Mass recruitment may be a sign of expansion, in which case the company will need new software licences, more services, or hardware. It might even need a better recruitment consultant if the hires coincide with layoffs.

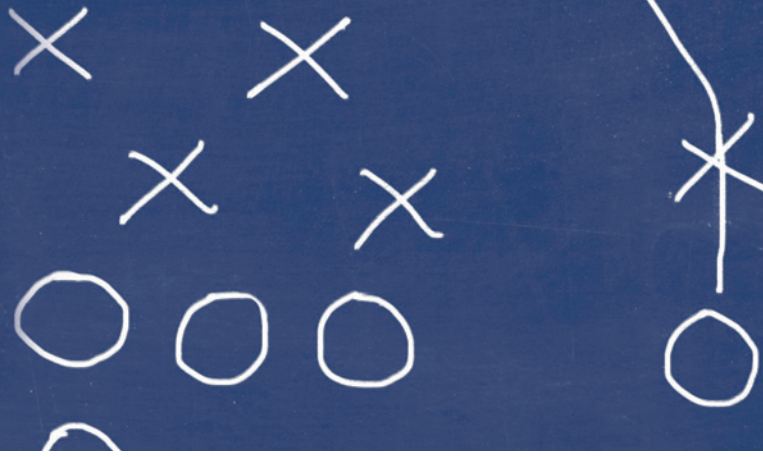
Mass layoffs may be the result of a bad financial year leading to downsizing. This can be a great opportunity to help the company save money and outsource some of its service provision. Dig around to understand the company's situation, then present a finely honed proposal.

Spotting this trigger using Artesian:

- Create *Artesian Email Alerts*
- View *Market News* to identify key headlines
- Read the latest News in *Watchlist News*, or click on the company name
- Check *Social Media* for latest Blogs/Tweets

# Trigger #12

New Organisational Strategy/Initiatives



Strategy is a tough one to gauge from the outside – most organisations don't upload their strategy to their blog. It's hard to get a glance inside a company to see which projects are getting funded and which are being punted to another time or cancelled entirely.

You may, however, be able to glean these insights from a social post or change in social media behaviour. If one of the senior management team is speaking at a series of industry-specific conferences, for example, the company may be expanding into new sectors or services. Tweets that promote another company might signal a new partnership.

Picking up on these signals and positioning your offering accordingly will impress buyers with your seemingly psychic senses.

Spotting this trigger using Artesian:

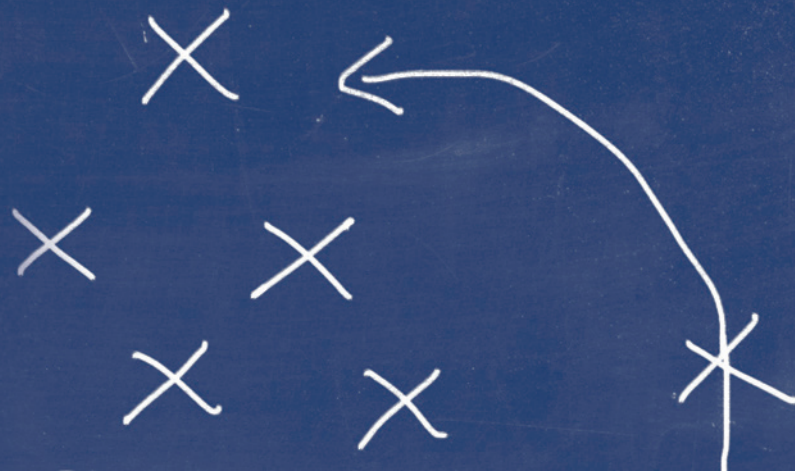
- Check *Social Media* for latest Blogs/Tweets
- Read the latest News in *Watchlist News*, or click on the company name *Your Influence*

“ I think it's fantastic, I'm getting information I never would have had before ” **Deloitte.**



# Trigger #13

Buyer Opens Your Email



When are you definitely top of a prospect's mind? When they're physically looking at an email you sent. It could be a piece of insight you've gained or a short introduction email – if you're in front of them, they're primed.

Can you hold their attention while you still have it? Maybe you want to follow up with a perfectly-timed call? Exactly how you respond will depend on your processes and what works for you. The best thing is to experiment and record your results for others to follow.

Spotting this trigger using Artesian:

- Check whether a buyer has opened your email using *Your Influence*

“ It allows me to keep regular contact with a company, Artesian gives me an earlier heads up where I might have missed it before ”



# Trigger #14

New Legislation

When the Affordable Care Act came in, businesses that never previously had to offer health insurance to employees were suddenly mandated to by law. In order to determine which employees were eligible and which were not, these organisations had to scrutinise the amount of hours employees worked according to very specific rules. And if the company didn't have a sophisticated time tracking system in place? Ouch.

This is just one, albeit rather massive, example of how new legislation can turn a business upside-down. The time, resource, and effort it takes to deal with the fallout can be huge – so if you can swoop in and save the day with your solution, they're likely to bite your hand off.

Just be sure to research prospects and personalise their emails. Generic emails sound salesy and opportunistic, not like you're offering a solution tailored to their needs.

Spotting this trigger using Artesian:

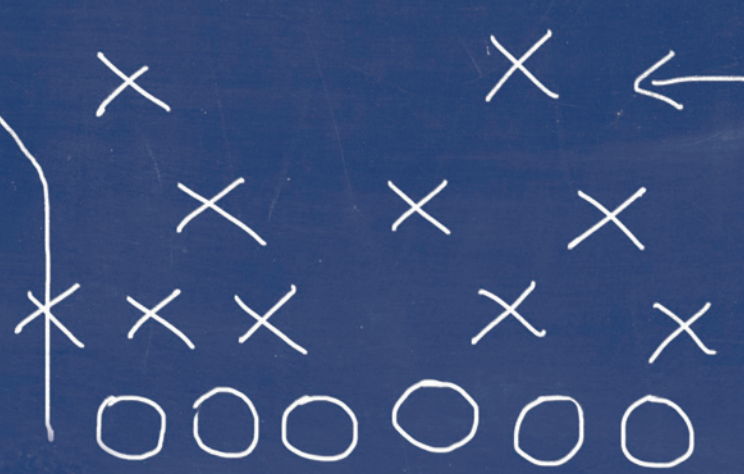
- View *Market News* to identify key headlines
- Track key *Industry Influencers*
- Track key *Competitors*

“Artesian helped me to connect with people I didn't know about before and I haven't thought about it before”



# Trigger #15

Change in Price/Availability of Essential Resources/Materials



If a material central to a business's model suddenly vanishes or becomes cost prohibitive, the company will be looking for alternate ways to get its hand on it – or replace it with something else.

These changes often happen suddenly in response to geopolitical events, so they are hard to predict. Keeping an eye out for these changes and being ready to respond, however, positions your business as responsive and understanding of industry needs.

Spotting this trigger using Artesian:

- View *Market News* to identify key headlines
- Track a company's ecosystem (e.g. follow partners, suppliers, and competitors)

# Trigger #16

## Winning an Award

Recognition within an industry or niche feels great. If they're a customer, you can share in their success and remind them how you've contributed. If they're not, perhaps they could win more awards with your help?

Reach out while they're riding a high and inform them of how you can help them continue to top their competition – or even put more distance behind them.

Spotting this trigger using Artesian:

- Read the latest News in *Watchlist News*, or click on the company name
- Check *Social Media* for latest Blogs/Tweets
- View *Market News* to identify key headlines

“ I'm using it every day, very informative and a great way to know what's going on with my customers and prospects ”





# Trigger #17

## Evidence of Interest

If you sell a new kind of software and a prospect posts an article on Twitter about the benefits of that kind of software, they're displaying their interest in your product for the whole world to see.

Carefully monitor what prospects are posting, sharing, and liking on social networks. And if the topic coincides with what you sell? Pounce on it.

It may be that they already own the software. If they're your customer, they could become a social media champion. If they bought from a competitor, there's a chance to steal the business.

If they're interested but not already a customer, this is the ideal opportunity to get in touch and make sure they know the benefits of your solution.

Spotting this trigger using Artesian:

- Check *Social Media* for latest Blogs/Tweets
- Click on the *People* tab to identify key individuals, and use the launch buttons to view their profile on your LinkedIn

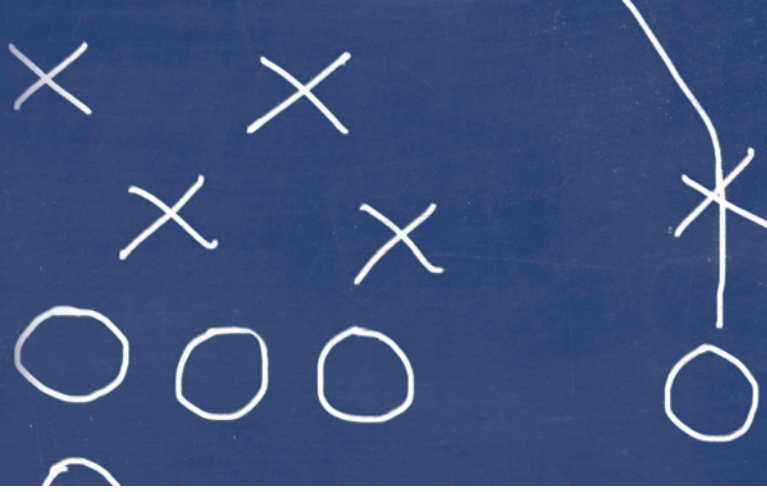
“ In the past we'd buy a huge amount of data from agencies. We'd have no way of validating information and it would be very time consuming. Prospector has saved me a week's worth of work ”



sage

# Trigger #18

Analyst Report Released



Every industry has analysts that periodically research and rank companies in their vertical. Once you identify the notable analyst firm(s) in the market you sell to, keep an eye on their new research releases.

Organisations that rank highly will be looking to capitalise on their status, and organisations that fall to the bottom of the heap will be looking to disrupt the order. Both situations provide an excellent opportunity for you to engage buyers.

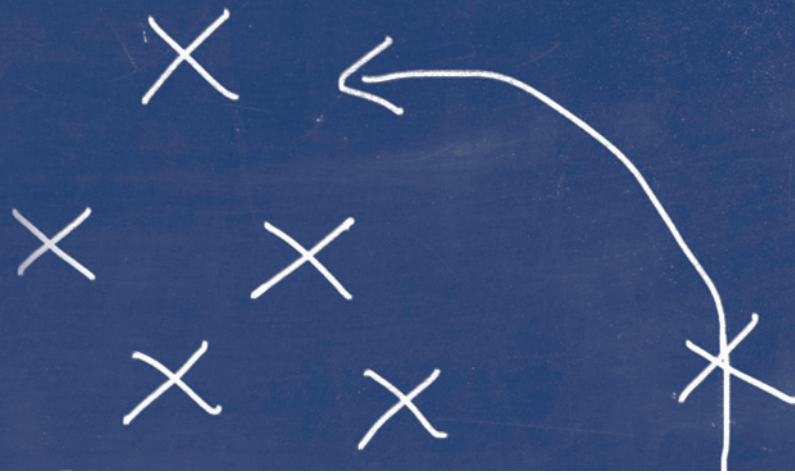
Tailoring your message will help you appeal whether they're at the top or bottom – it's all about positioning. Your solution can help small businesses disrupt the status quo? Great! Your solution can keep them ahead of the smaller disruptors? Perfect!

Spotting this trigger using Artesian:

- Read the latest News in *Watchlist News*, or click on the company name
- View *Market News* to identify key headlines
- Create Artesian *Email Alerts*

# Trigger #19

Additional Funding/IPO



Money is scientifically proven to burn holes in pockets. Don't be shy about reaching out to a company that has recently come into some cash and suggesting ways to spend it wisely.

It might be worth following the investor for news, as well. If they're known for wanting to see an immediate return, you can position your organisation as the perfect partner to help achieve that growth. If they're more cautious, you can demonstrate how your solution minimises risk.

Whatever their approach, there's an angle you can approach from that will make you appear understanding and responsive.

Spotting this trigger using Artesian:

- Create Artesian *Email Alerts*
- Read the latest News in *Watchlist News*, or click on the company name
- View *Company Info*
- Check *Social Media* for latest Blogs/Tweets

# Trigger #20

## Press Coverage – Event Announcement

Whether positive or negative, an article from a third-party publication will cast a certain light on a company. Be there to help them maximise positive coverage or turn around negative sentiment.

There may also be opportunities *within* the content of the coverage that could play to your advantage. A spotlight interview with a prospect CEO, for example, could reveal the philosophy, ethos, and future plans behind a brand – great for aligning your product or service with their long-term vision.

Press is ultimately about perceptions. Everything an organisation does contributes to its perception. So get involved and help make coverage positive where possible.

Spotting this trigger using Artesian:

- Create *Artesian Email Alerts*
- Identify key events using the *Topic Cloud* in *Watchlist News* or in a targeted company
- Use *Market News* to identify industry headlines
- Check *Social Media* for latest Blogs/Tweets

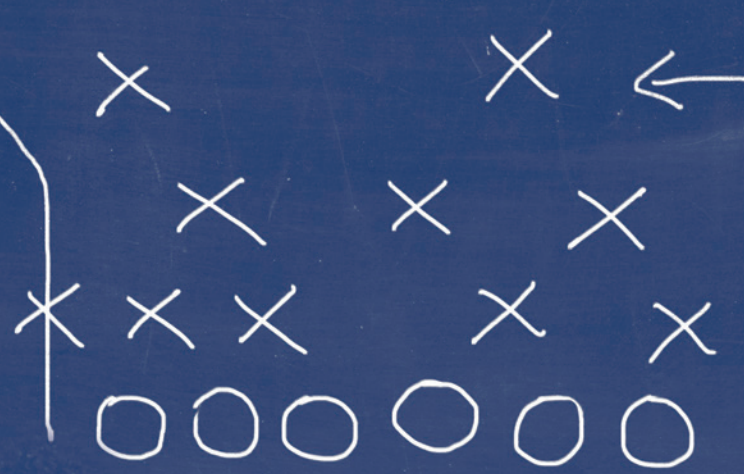
“*Artesian is saving my team an enormous amount of time – it’s a really concise and helpful way for the team to understand what is happening with their customers*”





# Trigger #21

Entering Into a New Market/Market Development



Every industry has news that makes huge waves within the category and registers barely a blip to the rest of the world. New problems to contend with, new needs, budgets, and timelines – the perfect atmosphere for a new sales opportunity.

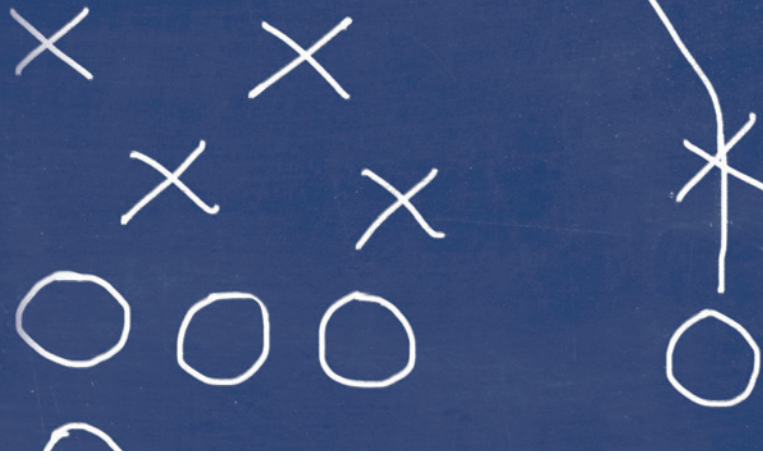
Whatever these events may be, make sure you're tracking them. A seismic industry shift will mean that all businesses within the vertical need to take action to either capitalise on an opportunity or avoid a risk. If you can help with either goal, reach out quickly.

Spotting this trigger using Artesian:

- Use Market News to identify industry headlines
- Follow key Industry Influencers to highlight key developments to your customer/prospect
- Check Social Media for latest Blogs/Tweets

# Triggers

## Putting Triggers to Use



Triggers lead to insights; insights lead to actions. Ultimately, how you go about actioning the insights you gain by spotting sales triggers is completely dependent on you and your personality.

If you are naturally witty and charming, then fire over a brief message on LinkedIn referring to the trigger. If you are naturally more reserved and technical, dazzle them with some expert advice related to their specific problem.

There is no point pretending to be someone you're not – at some point, you will likely have to talk to the prospect on the phone or in person. If you're not the person they expected, they're likely to be put off.

For more practical guidance on identifying and using triggers:

- Register for Artesian's Trigger Training Masterclass on 1st December at Connections16 – the annual B2B conference for sales and marketing excellence.

[Find out more and book your tickets today >>](#)

## About Artesian

Artesian's powerful platform equips B2B professionals with the market and business insight they need to understand their audiences and have relevant and timely conversations. The prospecting tool enables you to build lists from over four million companies and filter by industry, geography, revenue, size, growth, credit rating and more. Artesian gathers real-time business information from millions of sources to present commercially valuable and actionable insights that make client-facing teams more customer centric.

## About the Author



James Reid is the Chief Sales Officer at Artesian. He leads the go to market teams, responsible for new and existing customer relationships through the Sales and Customer Success teams.

James has managed world-class sales teams for over 20 years, with a focus on customer success. Prior to joining Artesian, James was the GM and AVP at Hybris an SAP Company, an innovative Omni Channel Commerce and CRM platform that was sold to SAP in 2013. Prior to SAP, James spent 3 years as the Head of Enterprise Sales UKI at Salesforce.com and held senior management positions at Vodafone, Sap and HP. James has particular experience in rapidly developing and scaling businesses. James holds a Bachelor of Science degree with a major in Economics from the University of Bath.

### Reference

1 Artesian Customer Survey, June 2016

Artesian clients include American Express, Adobe, Barclays and HSBC.



[Request a demo](#)

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