

Revenue 

5 Sequences
Every Team Needs
In Their Playbook

Intro

There's more pressure on revenue teams today than ever before. In order to keep up with growing demands, teams are looking to execute multichannel, multitouch engagement with buyers.

It's no surprise that many high-performing sales teams are adopting and embracing AI-powered sequencing solutions like Revenue.io's Guided Selling to help them scale their efforts and drive more revenue. In fact, Gartner predicts that **75% of B2B sales organizations** will augment traditional sales playbooks with AI-powered guided selling solutions by 2025.

“Revenue.io is recommended for sales organizations seeking a Salesforce-embedded coaching, pipeline and deal management technology stack enhanced real-time guidance.”

Gartner

Market Guide for Sales Engagement Application

Why?

Because these solutions minimize the guesswork of sales so you can spend more time talking with customers and closing deals. You can execute the perfect playbook every time.

Of course, that's all good in theory, but what are those best-in-class sequences? **We're glad you asked.**

Below, we are giving away the proven Guided Selling sequences that we use at Revenue.io to engage more buyers and close more deals.

1: Hot Lead Sequence (Setup)

Overview

This sequence is used to follow up with leads that you want to contact immediately, such as demo requests. Why is speed to lead so important? Organizations that contact a lead within the first hour are seven times more likely to qualify the prospect than an organization that responds in two hours.

Type

Lead

Activation

Automatic

Channels

Email

Call

SMS

Voicemail

Task

People Involved

Selling Team

Buying Team

SDR

Hot Lead

Total Touches

8

Timeframe


14 Days

Entrance Criteria

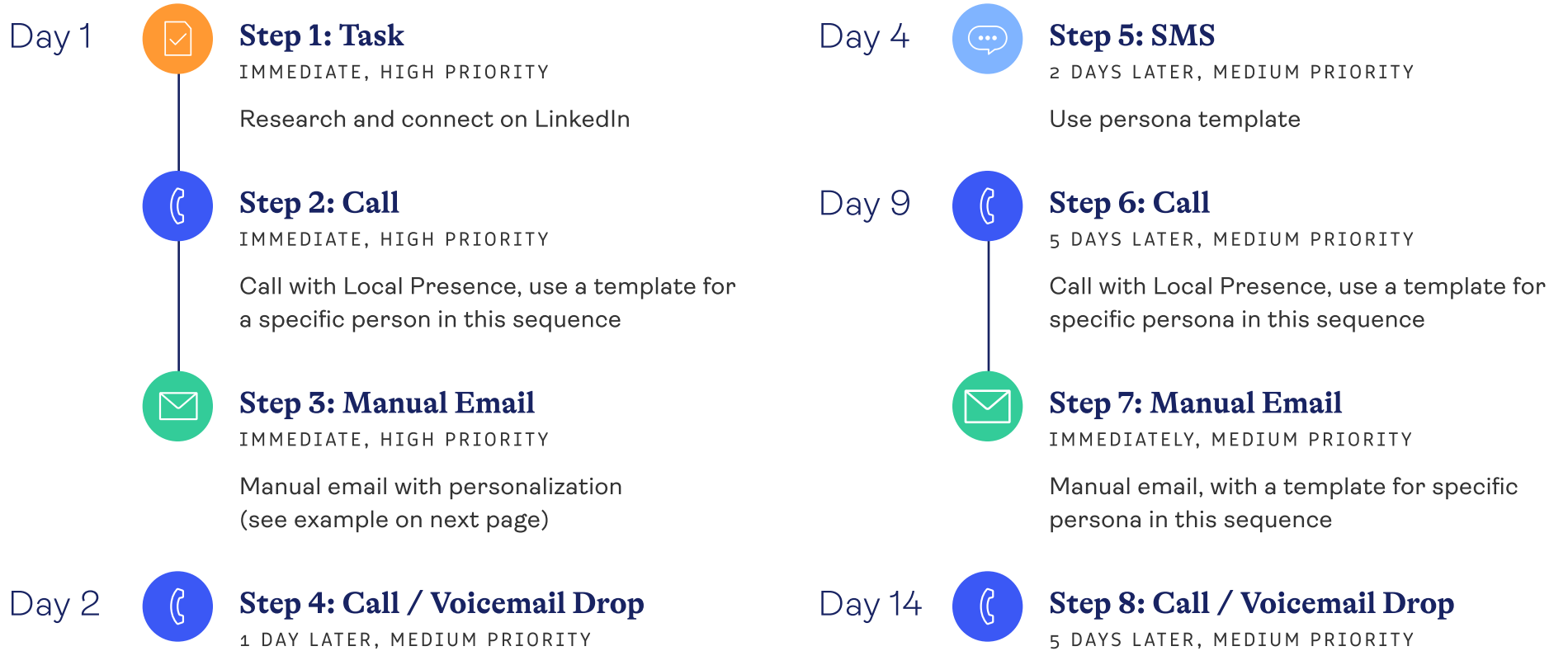
Lead Source = Demo Request and Lead Score is greater than 70

Exit Criteria

Lead Status = In Contact or Meeting Set

 **PRO TIP:** We know that the faster we can respond to leads, the higher the chances are that we will be able to connect with them. Therefore, we've set the priority for the first steps on day 1 to high, which means they will show up higher in the Engage view. You should use high priority sparingly and reserve it for those situations that require urgent attention.

Hot Lead Sequence (Steps)

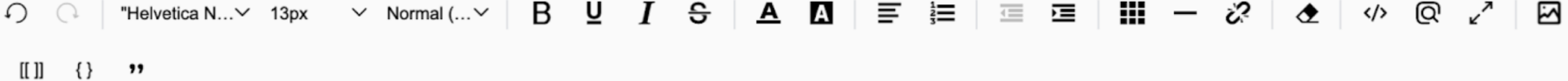


Hot Lead Sequence (Steps)

Email Subject *

Revenue.io Demo Request for {{{Participant.Company}}}

Email Body *



Hi {{{Participant.FirstName}}},

Thanks for submitting a Revenue.io Demo Request!



[[Personalize based on research.]]

I'd love to understand how Revenue.io can help you reach your goals for this year. Since we have a few different solutions built within our platform, let's schedule a quick call so I can learn about what an ideal solution would look like. Then we'll be able to tailor a demo to your needs.

Feel free to choose a time on my calendar here: {{{sender.revenue_url_c}}} or let me know when you're free to chat.

Thanks!

{{{Sender.FirstName}}} {{{Sender.LastName}}}
{{{Sender.Title}}}
{{{Sender.Phone}}}

Cold Outbound Door Opener Sequence (Setup)

Overview

This sequence is used when an outbound rep (typically an SDR) needs to reach out to a prospect cold and start a conversation.

Type

Lead

Activation

Manual

Channels

Email

Call

Voicemail

Task

People Involved

Selling Team

Buying Team

SDR

Target Key Person

Total Touches

12

Timeframe

25 Days

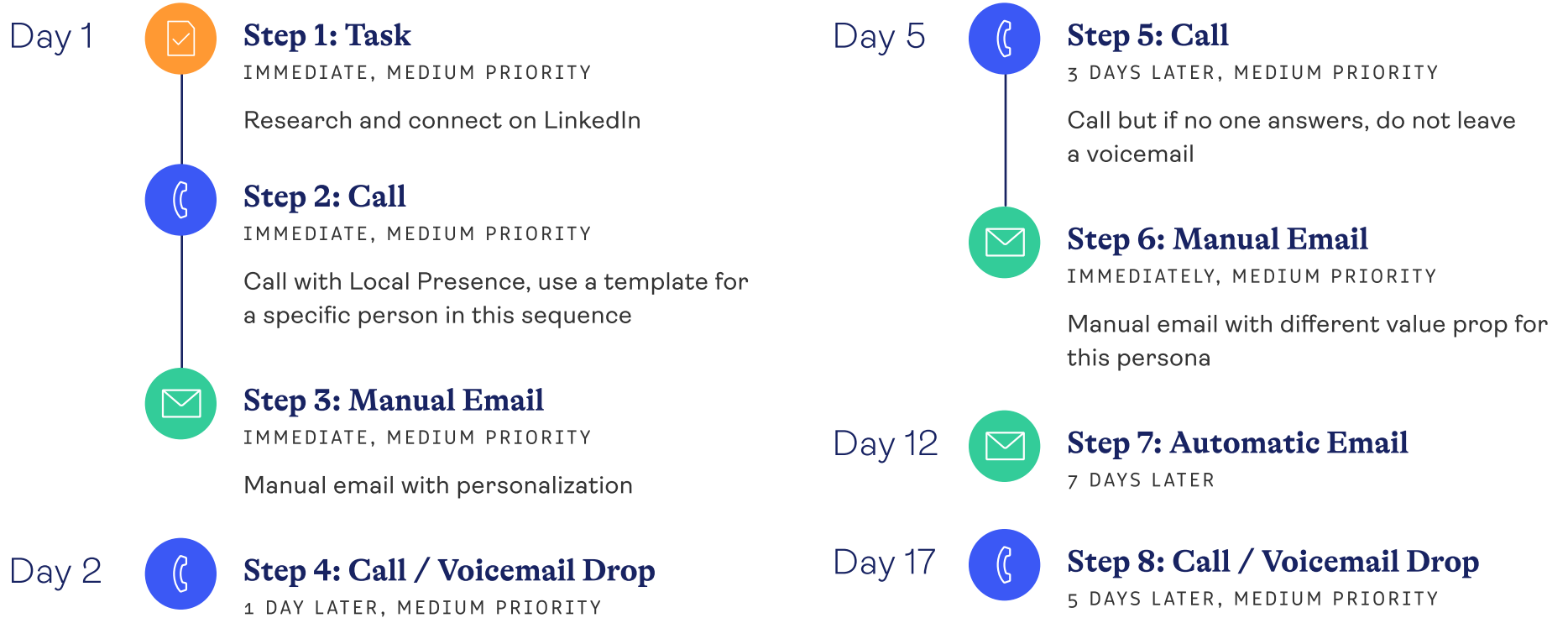
Entrance Criteria

Lead Status = Open





Exit Criteria

Lead Status = In Contact or Meeting Set

Cold Outbound Door Opener Sequence (Steps)



Cold Outbound Door Opener Sequence (Steps)

- Day 21  **Step 9: Task**
4 DAYS LATER, MEDIUM PRIORITY
Engage with their content on LinkedIn
- Day 22  **Step 10: Call**
1 DAY LATER, MEDIUM PRIORITY
Call with Local Presence
-  **Step 11: Manual Email with Personalization**
IMMEDIATE, MEDIUM PRIORITY
- Day 25  **Step 12: Automatic Email**
3 DAYS LATER
Automatic email, last attempt template

All done! Have a sip of your favorite tea, or stretch your legs. You're doing great.



Wake the Dead Sequence (Setup)

Overview

Use this sequence when you have a deal that is stalled out, your champion has gone dark, and you need to bring it back to life.

Type

Opportunity

Activation

Automatic

Channels

Email

Call

SMS

Task

People Involved

Selling Team

Buying Team

AE

Executive

Key Persona

Total Touches

8

Timeframe

21 Days

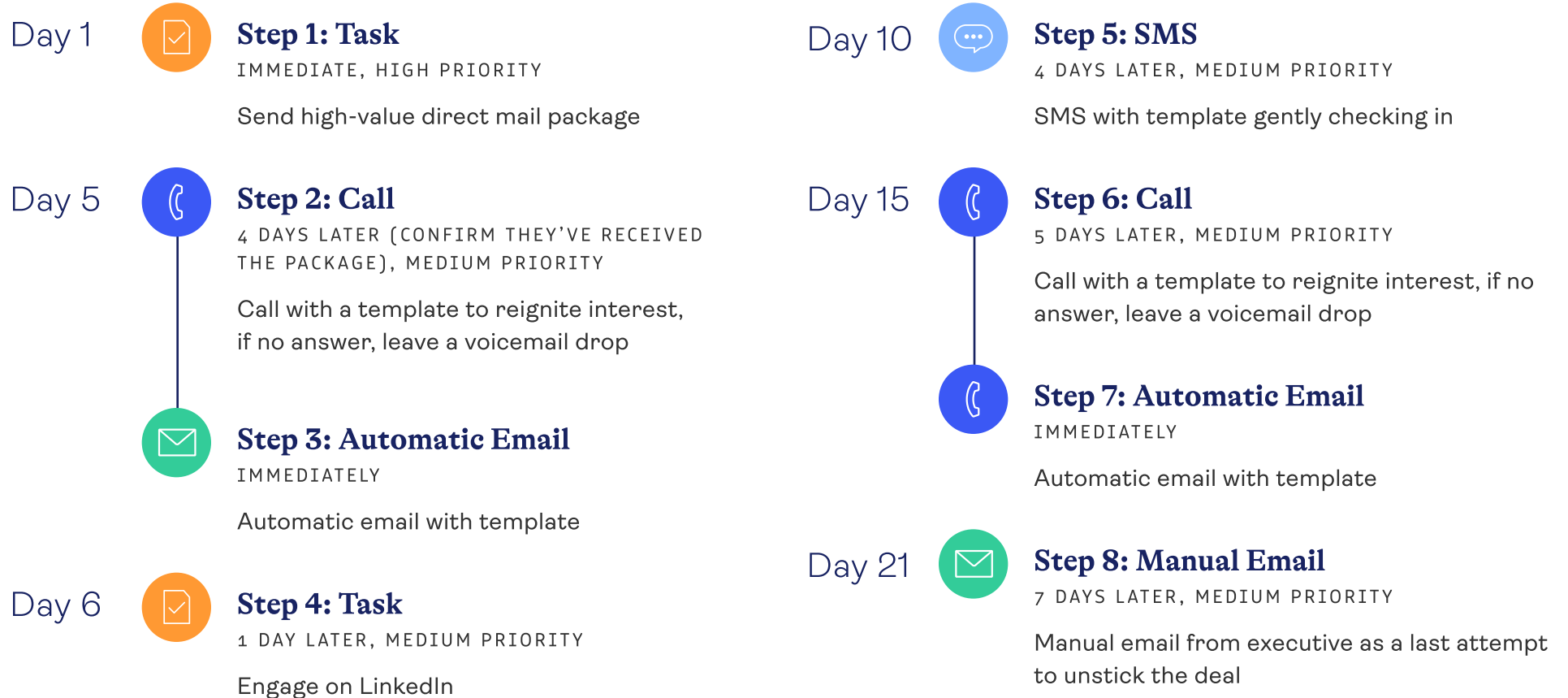
Entrance Criteria

- Days since last attempt (call or email) is greater than 30
- Last inbound call is greater than 30
- Last inbound call is greater than 30
- Opportunity stage: (set this to a stage that is late in your deal cycle)

Exit Criteria

Opportunity stage = Closed won or Closed lost

Wake the Dead Sequence (Steps)



Deal Acceleration Sequence (Setup)

Overview

Large, complex deals can take a long time to close, but it's important that reps are in constant communication with and providing value to their champions. Use this Sequence for late stage opportunities to continue building confidence with the buying team by providing valuable resources and positioning yourself as a trusted advisor.

Type

Opportunity

Activation

Manual

Channels

Email

Call

SMS

Task

People Involved

Selling Team

Buying Team

AE

Champion

Total Touches

8

Timeframe

20 Days

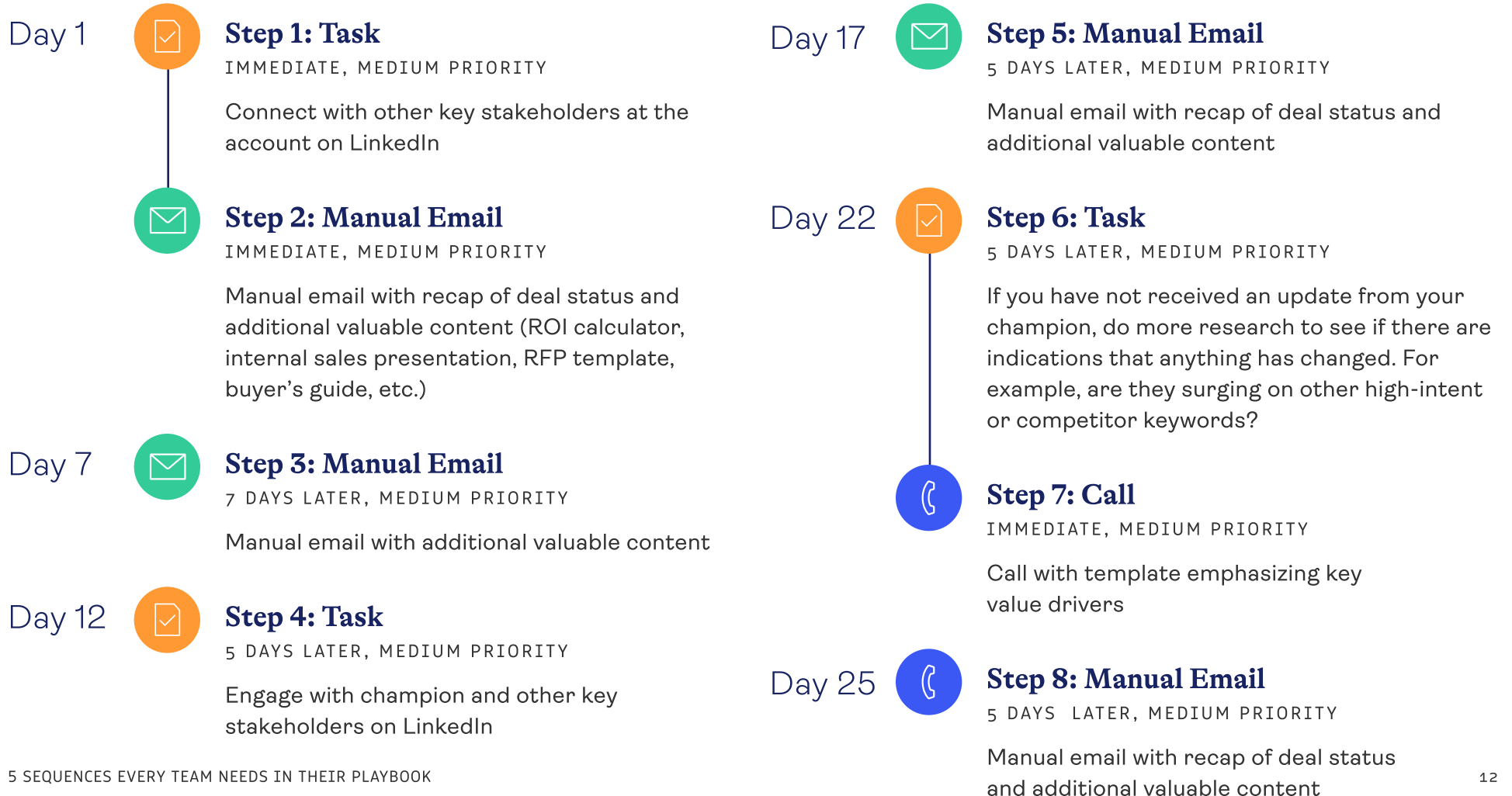
Entrance Criteria

- Status includes (choose a mid to late stage in your process, for example Business Case)
- Opportunity amount greater than or equal to (choose an amount that make sense for your team)
- Forecast close date is within 30 days

Exit Criteria

Status includes Closed Won or Closed Lost

Deal Acceleration Sequence (Steps)



Upsell/Cross-Sell Sequence (Setup)

Overview

Selling to existing customers is both much easier and cheaper than selling to net new customers, so it only makes sense to build Sequences to sell more into your customer base.

Type

Opportunity

Activation

Manual

Channels

Email

Call

SMS

Task

People Involved

Selling Team

Buying Team

AE

Champion

Total Touches

10

Timeframe

29 Days

Entrance Criteria

- Role includes Decision Maker
- Stage includes CSM Identified Opportunity, or equivalent in your Salesforce stages

Exit Criteria

Stage includes [anything past a stage 0 opportunity in your Salesforce stage]

Upsell/Cross-Sell Sequence (Steps)



Upsell/Cross-Sell Sequence (Steps)

Day 29



Step 9: Task

7 DAYS LATER, MEDIUM PRIORITY

Call with upsell/cross-sell template



Step 10: Manual Email

IMMEDIATELY, MEDIUM PRIORITY

Manual Email with different value props +
different use cases



Awesome job!

Want more sequence know-how?

5 SEQUENCES EVERY TEAM NEEDS IN THEIR PLAYBOOK

In our Best Practices Guide for Guided Selling, you'll find:

- 3 more sequences
 - Additional best practices & recommendations
 - Metrics & benchmarks to measure successful sequences
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With Guided Selling, you can rest assured that your reps are following proven playbooks, engaging buyers with best practices, and leveraging data-driven technology to minimize the guesswork and maximize revenue.

Learn how Guided Selling by Revenue.io can guide reps in real time with the only guided selling engine built exclusively for Salesforce.

[Learn more](#)