SRENE

PLAYBOOK · PROSPECTING

The Prospecting Playbook

A structured, repeatable framework for identifying, engaging, and converting your best-fit opportunities, from first signal to first meeting.

P The Seller's Mindset

Frameworks and tools are only as good as the mindset behind them.

Be Prepared, Not Lucky	Every great call is 90% preparation. Prospects can feel the difference between a rep who did the work and one who winged it. Preparation is respect.
Earn the Right to Advance	Never push for next steps you haven't earned. Move forward when the customer gives you a signal, not because your pipeline says a deal should close this quarter.
Your Champion Wins with You	The best sellers make their champion look like a hero internally. Their success is your success. Protect them, arm them, and never put them in a position they can't defend.
Silence Is a Signal	When a deal goes quiet, something changed. Don't wait. Investigate. A week of silence is a warning. Two weeks is a problem. Three weeks is a lost deal you didn't know was lost.
Own the Process or It Owns You	In any real deal, someone is always in control of the buying process. Make sure it's you, by defining next steps and keeping both sides accountable.
Data Over Intuition, Curiosity Over Assumptions	Build your case on the customer's own numbers. Ask more questions than you answer. The reps who ask the best questions close the most deals.

01 Research & Account Intelligence

Before the first call, the best sellers know more about a prospect than most people who work there. Research turns cold outreach into a credible, contextualized conversation, even when the account doesn't have a public filings history to read.

Company-Level Signals

Business Context

- Website, About page, and any public mission or roadmap statements
- Recent local press, funding announcements, or industry newsletters
- Team size and growth trajectory, visible through LinkedIn headcount trends
- Reviews and testimonials, they reveal what the business actually values

Operational Signals

- Visible tech stack (job postings, careers page, integration badges on their site)

- Open roles, especially anything hinting at a new initiative or team build-out
- Recent leadership hires or departures
- Seasonal timing relevant to their business, budget cycles, busy seasons, slow periods

Stakeholder Signals

At this size, there's often one real decision-maker, not a formal committee. Find them directly rather than mapping a large org chart.

- Owner, founder, or department head, whoever actually owns the budget
- Their recent LinkedIn activity, posts, comments, or shared content
- Shared connections who could offer a warm introduction
- Any team member who'd be the day-to-day user, they can be a real ally even if they're not the buyer

Trigger Events Worth Watching

- New funding, a new location, or a stated expansion
- A new hire in a role connected to your product
- A product launch or public announcement
- Any moment they've publicly described a problem your category solves

02 Call Preparation & the 3x3

The 3x3 framework is a structured pre-call discipline: identify 3 meaningful insights about a prospect in 3 minutes or less. Used consistently, it raises the quality of every first conversation, without turning prep into a research project.

3 Insights in 3 Minutes

INSIGHT TYPE	WHAT TO LOOK FOR
Business insight	A recent priority, a growth target, or a challenge they've mentioned publicly
Personal insight	A recent post, comment, or career move that signals what they care about right now
Shared context	A mutual connection, shared tool, community, or reference customer in their space

Pre-Call Checklist

- Research complete (3x3 done)
- Hypothesis on their pain or priority formed

- Personalized opener drafted
- Value hypothesis tied to something they actually care about
- Likely objection thought through in advance
- Next step defined before you dial

03 Outreach Strategy & Sequencing

Effective outreach is multi-channel, personalized, and persistent without being aggressive. Each touch builds on the last, adding a reason to respond rather than just repeating the ask.

A Six-Touch Sequence

Day 1	A connection request with a personalized note referencing something specific about them.
Day 3	Email #1: a short, personalized opener tied to a real signal you found.
Day 7	A call, plus a 15-second voicemail that adds one new detail beyond the email.
Day 10	Email #2: share a relevant story, benchmark, or piece of insight, no ask attached.
Day 14	Engage with something they posted, or share something genuinely useful.
Day 18	Email #3, the graceful close: a clear value line, one easy next step, and an honest exit.

Channel Notes

CHANNEL	WHAT ACTUALLY WORKS
Email	One clear idea, four sentences max, a subject line that earns the open, a low-friction CTA
Phone / voicemail	Keep it under 15 seconds, reference the email by name, give your number twice, slowly
Social / LinkedIn	Engage with their content before connecting, reference something specific, don't lead with a pitch

04 The 5-15-3 Prospecting Model

A structured daily discipline for a healthy, self-sufficient pipeline. It balances top-of-funnel activity with focused attention on the accounts most likely to move.

THE RHYTHM	WHAT IT MEANS
5 focus accounts	High-priority accounts that get daily attention, each with a defined next action, rotated weekly based on real signals
15 daily touches	A mix of email, phone, and social, each one intentional and tracked, quality over volume
3 new conversations / week	The benchmark for a healthy pipeline. Below 3, diagnose your targeting or messaging. Consistently above 3, protect that momentum

Pipeline Health Benchmarks

METRIC	TARGET	WARNING SIGN
Pipeline coverage	3-4x quota	Below 3x heading into a period close
Average deal age	Aligned to your typical cycle	Deals lingering 2x past that average
New opportunities / week	2-3 qualified new opportunities	Zero new opportunities for 2+ weeks

This framework draws on ideas from established sales methodologies (including Sandler, the Challenger Sale, and MEDDIC-style qualification), adapted for teams building a self-sufficient, structured process without a large enablement function behind them.