



Module 23: Dynamic Prospecting



Dynamic prospecting is an extension of the Accounts and Lead List module, particularly around the use of triggers. When breaking into strategic accounts, it is important to set up the system you'll use to identify, sequence, and prioritize outreach.

1. What is Dynamic Prospecting?

<https://share.descript.com/view/HBtKvWLnfg>

Static prospecting is the traditional way of segmenting a list – demographics, firmographics, technographics. Great broad strokes that build your Qualified TAM list. But it doesn't answer – why now? And it requires manual refreshes.

Dynamic prospecting is using automated triggers, events, and other data sources to prompt your outreach. It is event-based data (instead of "object-based data").

Think of it this way: most static data will not change in a 60-90 day window. The company will still be in the same industry, their CRM tech stack will still be mostly the same, their growth rate won't substantially change.

Most dynamic data will change in a 60-90 day window. They will hire a new senior leader, they will raise funds, they will layoff or hire a lot of people, they'll purchase new tech, they will get inundated with poor G2 reviews, etc.

This dynamic data is what demonstrates it's a good reason to reach out **today vs. 60 days from now.**

Republishing the example trigger ideas from the [Account and Lead Lists](#) module here:

▼ Example Triggers (Table of Ideas)

Full credit to [Jesse Oulette](#) for this wonderful list. We could add a couple but honestly... this is a great starting point.

Expansion / Relocation	New job / position for a current contact
Increase / Decrease in Customer Base	Dissatisfaction with Current Vendor
Increase in Hiring Velocity	Positive / Negative Press Coverage
Creation of New Job Title	Increase in positive / negative employee reviews
Increase in Business Expenses	Increase in positive / negative reviews on G2
Competitor Launched a New Product	New website / major website changes
New Executive	Lawsuits
Merger/Acquisition	Website security issues / prospect website issues
Layoffs	Increase in demand for prospect's product
Change in Management Strategy/Restructuring	Selling Assets / cutting losses
Shift in Sales Channel (Inbound vs. Outbound)	Company facing piracy issues
Increase/Decrease in Marketing Budget	Creation of new job title
Entrance into New Markets	Bad quarter
Change in Marketing Channel	Good quarter
Funding Rounds	Increase in software expenses
Major Customer Announcement	Change in web traffic
New Product/Service Announcement	Q&A threads related to prospect questions
Major Industry Development	New technology trend
New Legislation	Event Announcements

Awards/Recognition	Change in Marketing Agency
Analyst Report	New Tool Adoption

2. Automate Your Dynamic Prospecting

The good news: data is your friend. When prospecting into larger accounts, you do not want to manually scrape for this data. Instead, you will want to create an automated workflow that allows you to gather the trigger data without additional effort.

We're outlining two key automation tools that are fairly simple to setup for dynamic prospecting, but there are many additional ways to create this automation stack.

The goal is simple: create a flow of information, based on key triggers, that indicate the timing is right to start warming up the account and reaching out.

3. Dynamic Triggers with Sales Nav Saved Searches

Account Searches

Use Sales Navigator to create an Account search based on the qualification criteria you laid out in the Account and Lead Lists module.

Now, save the search in the top right corner.

Search keywords

Saved searches

☐ Select all
 [Save](#)
[Unsave](#)
[View current employees](#)
348 results
[Save Search](#)

LinkedIn will prompt you to save this account. The important thing is to **give it a descriptive name.** Don't settle for just a bunch of meaningless data points. You'll want to provide future you the context.

Save your account search

×

This search will be saved to your saved account search page. Results are updated daily and you will receive emails on saved search alerts weekly.

Name	Created on
<input type="text" value="Account Search 1"/>	10/13/2022

Cancel

Save search

Now you can find these saved searches at the top on the right hand side of the search bar.

Lead filters +

Account filters +

Saved searches

Lead Searches

Use Sales Navigator to create a Lead search within a Qualified TAM list. As mentioned in Account and Lead Lists, we're not a huge fan of using Lead lists for effective outbound.

But, as you're prospecting into enterprise accounts, lead searches are an excellent opportunity to more effectively prospect into organizations.

- Filter the search by your saved Qualified TAM Account List
- Search for specific leads by Job Titles, Mentioned in the News, and/or Seniority Level (or any other lead filter that makes sense)
- Save the search with a context-providing name

Imagine these scenarios.

Scenario 1: A CEO of a company in your Qualified TAM list was mentioned in the news for a big transformative push they're championing inside their organization. LinkedIn will now update that saved search for you with that CEO so you can do deeper digging.

Scenario 2: A Senior Director of Data Analytics was just added to a company. These roles are usually great champions for your product. LinkedIn will update that saved search for you with the new Senior Director so you can view their profile, tier their profile (Tier 1, 2, 3), and start engaging with them effectively.

How It Works

LinkedIn updates every saved search daily. So as new accounts or leads fit the criteria based on the available data inside LinkedIn, there will be new results in your saved search.

- Use account searches to identify new accounts that meet your base level of qualification (Qualified TAM) and spark further research
- Use lead searches to identify new personas within your Qualified TAM list to spark further research and conversation

4. Dynamic Triggers with Google Alerts

Google Alerts helps you scrape the web for insights.

Let's say we're prospecting into Walgreens. We're going to set up a Google Alert based on the CEO (Roz Brewer) and "acquisition" to keep tabs on when the CEO is talking about acquiring companies.

This is what it looks like:

Alerts

Stay informed when your name appears online

 Roz brewer acquisition



How often	At most once a day	⬆️⬆️
Sources	Automatic	⬆️⬆️
Language	English	⬆️⬆️
Region	Any Region	⬆️⬆️
How many	Only the best results	⬆️⬆️
Deliver to	morgan@getalignd.co	⬆️⬆️

Create Alert

Hide options 

Alert preview

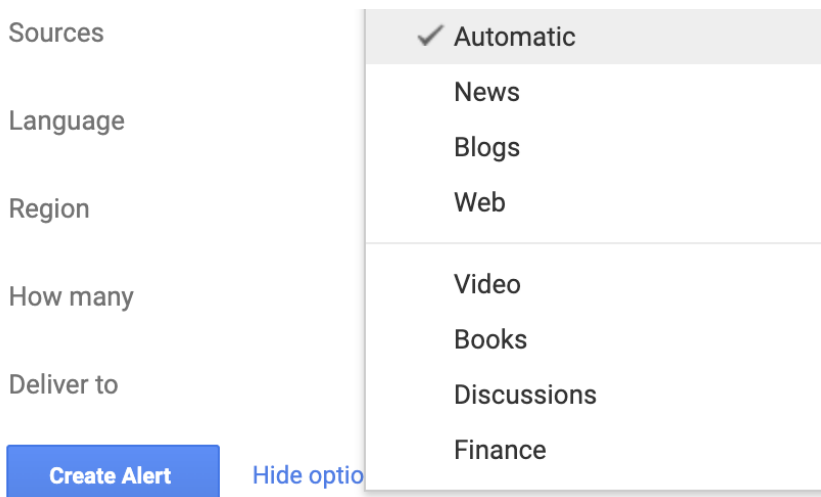
NEWS

Walgreens buys the rest of CareCentrix for \$392M - Advisory Board

Advisory Board

... Walgreens announced plans to **acquire** the rest of the company—a deal ... from our partnership with CareCentrix," said Walgreens CEO **Roz Brewer**.

I can use the provided optional filters to filter down my results – only getting news from certain regions of the world, how often I want to receive this update, what languages, etc.

A screenshot of the Google Alerts settings interface. On the left, there are labels for 'Sources', 'Language', 'Region', 'How many', and 'Deliver to'. Below these is a blue 'Create Alert' button and a 'Hide options' link. A dropdown menu is open, showing a list of sources: 'Automatic' (selected with a checkmark), 'News', 'Blogs', 'Web', 'Video', 'Books', 'Discussions', and 'Finance'.

You can also filter by specific sources on Google – only looking for new videos, for example, or only alerts from News instead of everything else.

There are **so many** ways to use Google Alerts. It might feel overwhelming, so here are some of our favorites:

- CEO's name + podcast = alerts when there's a new feature of a CEO on a podcast
- Company + acquisition = alerts when the company is acquiring another company (or being acquired)
- Company + key phrase = alerts when there are press releases using that key phrase. Especially useful if you sell in niche industries ("Walgreens interoperability") where the stakeholder is using the same language you sell with.

5. Other Dynamic Triggers

There is a **plethora** of sales intelligence and sales data tools that can offer other triggers. Every major intelligence platform has some version of automated, dynamic triggers that can prompt outreach.

We recommend **staying away from** funding round and leadership change announcements. These “triggers” have been used and abused by automation tools. They are not sufficiently meaningful anymore and outreach based on those triggers will likely be ignored because it will be viewed as spam.

Use these dynamic triggers to identify new high-value accounts and leads within those accounts for your prospecting motion.



Remember! If the new leads from your saved searches seem like good fits, then make sure to save them to your lead list and tier them out (Tier 1/2/3) as explained in the previous module, Module 22. That way you know what outbound strategy you’ll use to work with the profile.

Next:

 Module 24: Using Social for Account Research