Intersight Sales Success Kit

Steps to Get You Up To $10K Payout

Introduction: How to Use This Success Kit

Welcome to the **Intersight Sales Success Kit**—your guide to referring sales and revenue leaders who need AI-powered deal intelligence to improve their teams' performance.

Your objective is simple: **Refer someone into a sales call.** Intersight will take it from there.

In some cases, you won't need all the material here. But if your referral needs more convincing—or if you want to maximize your earnings by referring as many people as possible—this kit will be invaluable.

Why Intersight?

We know there's a big gap between top-performing sales reps and everyone else, and sales teams struggle with:

- Prioritizing the right deals
- Understanding buyers and tailoring messaging
- Creating sales documents quickly
- Spending too much time on CRM updates and admin work

Intersight solves this by using AI to surface deal insights, create sales documents, automate CRM updates, and help every sales rep operate like a top performer.

How to Get Paid

- **Earn $100** when your referral completes a qualified meeting.
- **Earn 10% of the first-year contract value** if they become a customer.
- **Get a $1,000 bonus** on your first referral that closes.

Payouts are processed within 30 days of Intersight receiving payment from the referred company.

Step 1: Decide Who to Refer to Intersight

Target Audience

Ideal referrals are sales and revenue leaders at B2B companies that:

- Sell software or services to other businesses
- Use Salesforce or HubSpot as their CRM
- Record and analyze sales calls and interactions
- Want to improve sales efficiency and effectiveness

Best-fit titles include:

- Chief Revenue Officer (CRO)
- Vice President or Director of Sales, Revenue Operations, or Sales Enablement

Challenges They Face

We want sales and revenue operations leaders to empower their sales reps (account executives) to overcome the day-to-day challenges keeping AEs from winning more:

- Difficulty identifying the right deals to focus on
- Lack of visibility into what top performers are doing differently
- Trouble crafting personalized sales documents efficiently
- Struggling to quickly respond to buyers with the right information
- Too much time spent on non-selling tasks like CRM updates and admin work

Example Prospect

Name: Sarah Thompson
Title: Vice President of Sales Operations
Company: GrowthTech Solutions (a mid-sized B2B SaaS company)

Sarah is responsible for streamlining sales processes and ensuring her team is efficient. She knows some of her reps are closing deals faster than others but struggles to pinpoint why. She is also under pressure to improve forecast accuracy and reduce time spent on CRM updates. She has tried training programs but sees inconsistent results.

Sarah is looking for a way to give her team more structured deal insights, automate repetitive tasks, and ensure every sales rep is as effective as the top performers.

Step 2: How to Talk to the Prospect

One important note on the conversation prompts below:
Intersight does not encourage you to say anything that isn't true.

These prompts are designed to help you steer the conversation naturally and engage with the prospect based on their real challenges and experiences.

Encourage These Dreams

- Imagine if your entire sales team could operate at a consistently high level.
- What if your reps had a way to prepare for meetings that didn't take hours?
- Wouldn't it be great if sales teams had clear insights into what makes deals successful?

Example conversation starter:
"It seems like every sales leader I talk to wants more consistency across their team. Do you think your team has all the tools they need to be at their best in every deal?"

Allay These Fears

- You're not the only one feeling pressure to improve efficiency without adding more work.
- No system or process will ever be perfect—sales teams are always evolving.
- It's normal to worry that tools or strategies might add complexity instead of reducing it.

Example conversation starter:
"I've heard from a lot of sales leaders that they're hesitant to introduce new approaches because they don't want to add friction. Do you feel the same way?"

Justify These Failures

- Most sales teams struggle with identifying what actually moves deals forward.
- Even the best reps sometimes miss important deal signals.
- It's hard to get reliable insights on what sales tactics and messaging are really working.

Example conversation starter:
"I've seen so many teams try to improve forecasting or pipeline visibility, only to realize they don't have the right data to work with. Have you run into that before?"

Confirm These Suspicions

- There’s probably a gap between what leadership expects and what’s happening in the field.
- Some reps are figuring out ways to win deals more efficiently, but it’s not always clear why.
- A lot of sales data exists, but making sense of it in real time is difficult.

Example conversation starter:
"It seems like every company has a few top performers doing something different from the rest, but it’s not always easy to pinpoint what that is. Do you think that’s happening in your team?"

Throw Rocks at These Enemies

- Endless manual CRM updates that take time away from selling.
- The constant feeling that there’s no single source of truth about deals.
- The frustration of having data but not knowing how to use it effectively.

Example conversation starter:
"One thing I hear all the time is how much time reps spend updating systems instead of selling. Do you feel like that’s an issue for your team?"

Step 3: Understand the Value You Can Offer

This step comes after understanding the prospect’s challenges.

Your success in making a referral depends on **helping the prospect recognize their own needs before introducing a solution.** Once they see the gaps, the value of Intersight becomes obvious.

The Reality Sales Leaders Face

- Sales teams spend too much time on admin work instead of selling.
- Reps struggle to personalize outreach and tailor messaging effectively.
- Leadership lacks visibility into what makes deals successful.
- The best reps are doing something different, but their strategies aren’t easily shared (and the rep may not even know what they do differently).
- The top sales reps use business cases to create momentum in deals; they can distill key information about the prospects’ challenges and reasons for investment into a

compelling business case, but not enough reps do this because it's time-consuming and painstaking work.
- CRM data is often incomplete, making forecasting and coaching more difficult.

The Shift That Needs to Happen

- Sales reps need insights that help them approach every deal with confidence.
- Leadership needs a clearer understanding of why some deals close and others don't.
- Teams need to cut down on the busywork that pulls them away from selling.
- Instead of guessing what works, companies should be learning from their own best deals.

What Happens When These Problems Are Solved

When sales teams have access to the right deal insights, they:

- Win more deals, more consistently.
- Spend less time on admin work and more time selling.
- Create better sales documents, faster.
- Improve team-wide performance by learning from past successes.

This is where Intersight comes in. It's not just about adding another tool—it's about **removing barriers that slow sales teams down and unlocking the strategies that actually work.**

The best sales reps are the ones who are creating business cases and collaborating with their champion on them - which is a key thing they do to drive momentum in the deal. But over half of reps don't create business cases because they are time-consuming. Intersight addresses this problem.   Further, the best reps are just more organized and responsive / communicative - that's how they win more deals. Intersight helps all reps become more responsive by helping them create relevant messages and docs faster.

Once the prospect understands this, the next step is simple: **introducing them to Intersight so they can see it in action.**

Step 4: Reach Out

Now that you know who to refer and how to guide the conversation, here are outreach templates you can use.

Each message is designed to **start a conversation, not pitch**—your goal is simply to introduce the prospect to Intersight.

Cold Outreach

Use these templates when reaching out to someone you don't know well.

LinkedIn DM Templates

1. Connection Request + Follow-Up
Connection Request:
Hi [First Name], I came across your profile and saw your work in [Company/Industry]. I'd love to connect and exchange insights on sales efficiency and revenue growth. Looking forward to staying in touch.

Follow-up (After Connection Accepted):
Thanks for connecting, [First Name]. I've been talking to a lot of sales leaders about challenges with [prioritizing deals, CRM admin work, sales team consistency, etc.]. Curious—how are you thinking about solving that at [Company]?

2. Straight to the Challenge
Hi [First Name], I've been hearing from a lot of revenue leaders that [common pain point, e.g., sales reps spend too much time on admin work]. Have you been running into that at [Company]?

3. Insight-Based Opener
Hi [First Name], I saw your post about [or noticed that your company is focused on] [topic related to sales/revenue operations]. I've been having a lot of conversations about this—curious how you're thinking about it at [Company]?

Email Templates

1. Subject: Quick question about [Company's] sales process

Hi [First Name],

I've been speaking with a lot of revenue leaders who are looking for better ways to [understand what's driving deal wins and losses, improve team's capacity, increase their span of control, etc.]. Curious—are you thinking about making any changes in that area at [Company]?

I'd love to introduce you to a team that's been working on some interesting solutions in this space. Let me know if you'd be open to a quick chat.

Best,
[Your Name]

2. Subject: How are you analyzing call recordings for deal insights?

Hi [First Name],

I'm speaking with revenue leaders who want to better understand what's driving their **deal wins and losses** based on actual customer conversations. Many teams record sales calls, but getting **actionable insights** from them—without hours of manual review—remains a challenge.

Curious—how are you currently analyzing call recordings to identify patterns behind successful deals? Are you finding that process efficient?

Would love to hear how you're approaching this at [Company Name] and share what we're seeing across other teams. Let me know if you're open to a quick chat.

Best,
[Your Name]

3. Subject: How are you thinking about [specific sales challenge]?

Hi [First Name],

I saw that [Company] is [mention something relevant—scaling, hiring, recently raised funding, etc.], and I imagine you're focused on making sure the sales team is operating as efficiently as possible.

I've been talking to a lot of revenue leaders about [specific challenge, e.g., making sure sales teams are spending their time on the right deals]. Curious—how are you approaching that at [Company]?

Let me know if you'd be open to a quick chat.

Best,
[Your Name]

Warm Outreach

Use these templates for existing connections or past conversations.

LinkedIn DM Templates

1. Following Up on a Past Conversation
Hi [First Name], I remember we talked about [previous topic] a while back, and I recently came across something that reminded me of that conversation. A lot of sales leaders are looking for ways to [specific challenge], and I'm curious—has anything changed for you since we last spoke?

2. Check-In Message
Hi [First Name], I saw [something relevant about their company, like a new product launch or hiring initiative]. That must be keeping you busy. How's everything going on the revenue side?

3. Referencing a Shared Contact or Insight
Hi [First Name], I was speaking with [mutual connection] about [relevant topic], and your name came up. They mentioned you're working on [specific sales challenge]. Curious—how's that going for you?

Email Templates

1. Subject: Following up on our last conversation

Hi [First Name],

Hope you've been doing well! We spoke a while back about [specific challenge], and I recently came across something that made me think of you.

I've been talking to other revenue leaders about how they're handling [pain point], and I'd love to catch up and hear what's been working for you. Let me know if you're up for a quick chat.

Best,
[Your Name]

2. Subject: Quick question on [Company's] revenue team

Hi [First Name],

I saw that [Company] is [mention recent development—hiring, funding, expansion, etc.]. Given that, I imagine you're thinking a lot about how to [relevant goal].

Would love to reconnect and hear what's top of mind for you. Let me know if you'd be open to a quick chat.

Best,
[Your Name]

3. Subject: Checking in—how's [specific challenge] going?

Hi [First Name],

We spoke a while back about [specific challenge], and I know a lot of revenue leaders are still looking for ways to tackle this. Just wanted to check in—have you found a good approach, or is this still something you're working through?

Let me know if it'd be helpful to chat.

Best,
[Your Name]

Referral Introduction

Use these templates when making an introduction to Intersight.

LinkedIn DM Templates

1. Direct Introduction
Hi [First Name], I wanted to introduce you to [Intersight Contact Name]. They've been working with a lot of revenue leaders on [specific challenge], and I thought it might be relevant for you.

I'll let you two connect from here, but I think it's worth a quick chat.

2. Soft Intro With Permission
Hi [First Name], I was speaking with [Intersight Contact Name] about [specific topic], and I think they could offer some useful insights for what you're working on. Would you be open to an introduction?

3. Framing It as a Thought Partner
Hi [First Name], I know you're thinking about [specific challenge], and I recently met someone who has been working on similar problems. Let me know if you'd be open to a quick intro—I think it could be a good conversation.

Email Templates

1. Subject: Introduction to [Intersight Contact]

Hi [First Name],

I wanted to introduce you to [Intersight Contact Name]. They've been working with sales and revenue leaders on [specific challenge], and based on our past conversations, I thought this might be something relevant for you.

I'll let you both take it from here—hope it's helpful!

Best,
[Your Name]

2. Subject: Thought this might be relevant for you

Hi [First Name],

We've talked before about [specific challenge], and I recently connected with someone who's been working on similar issues.

If you're open to it, I'd love to introduce you to [Intersight Contact Name]. Let me know if that would be helpful.

Best,
[Your Name]

3. Subject: Quick intro—thought this could be useful

Hi [First Name],

I was speaking with [Intersight Contact Name] about [relevant topic], and I immediately thought of you. I think you'd have an interesting conversation, and I'd be happy to make the intro.

Let me know if you're open to it!

Best,
[Your Name]

Conclusion: How to Get Paid

Now that you have everything you need to refer the right people, here's what to do next to ensure you receive your payouts.

Steps to Earn Your Commission

1. **Make the introduction**
   - Use the LinkedIn or email templates provided to start the conversation.
   - Once your prospect is interested, introduce them to the Intersight team.
2. **Register the lead in our HubSpot Registration Form**
   - https://info.intersight.ai/referral-lead-registration
3. **Earn your rewards**
   - **$100** for every qualified lead that completes a meeting within 45 days.
   - **10% of the first-year contract value** for every referral that becomes a customer (paid within 180 days of referral).
   - **$1,000 bonus** on the first referral that closes.

Payout Process

- Payments are made **within 30 days** of Intersight receiving payment from the referred customer.
- You'll be notified once your referral has reached the next payment milestone.

Maximize Your Earnings

- **Refer more people:** The more revenue leaders you introduce, the more you earn.
- **Follow up:** If your prospect hasn't responded, check in after a few days.
- **Use warm introductions:** If you have mutual connections, leverage them to increase success rates.

Final Reminder

Your job is simple—**start the conversation and make the introduction.** Intersight will handle the rest.

Let's get started. **Sign up, refer, and get paid.**