

INFLUENCING DECISION MAKERS \ PLAYBOOK

Quarterly
Business
Review

**How Modern Leaders Connect with Decision-Makers
Intelligently and Authentically**

9 Proven Sales & Marketing Strategies for 2026

15-Minute Read. Backed by research from LinkedIn, McKinsey, Gartner, ITSMA, and Sam.ai



**Generating
Referrals & Warm
Intros with AI**

**Becoming
influential in your
ideal client's inbox**

**Be first to know
who's in-market
with intent data**

**Using Agentic AI to
run appointment
setting campaigns**

SAM_{ai}



NOVEMBER, 2025

ISSUE NUMBER 1111

Executive Summary

In business today, success often depends on access — specifically, access to the C-Suite. These decision-makers and senior leaders — assess opportunities through the lens of strategy, data, and long-term value. Traditional approaches built on persistence or personality alone no longer resonate. Modern executives operate in an environment defined by information overload, analytical rigor, and a clear preference for authenticity and relevance.

Over the past decade, the nature of business development has evolved. Building relationships remains vital, but it must now be guided by intelligence — both human and artificial. Engaging executives effectively requires the right blend of insight, timing, and precision. This principle has guided Sam.ai since its inception in 2016: empowering professionals to connect with decision-makers intelligently and authentically to drive measurable growth.

The strategies outlined in this eBook draw on real-world experience and research from LinkedIn, McKinsey, Gartner, eMarketer, and ITSMA. Together, they present a modern framework for executive engagement — one that emphasizes value over volume, context over contact, and intelligence over intuition.

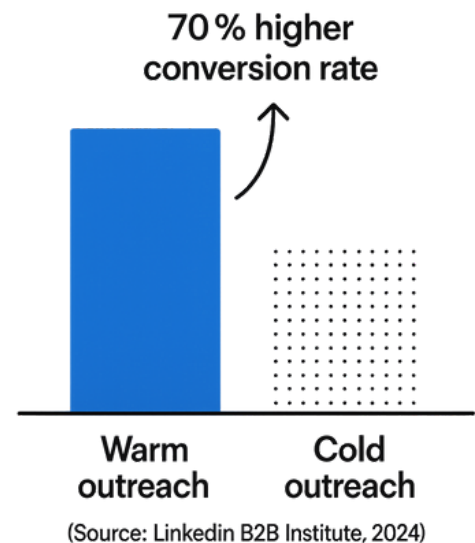
The final section, The Inside Track: The Shortcut to Smart Growth, provides a clear roadmap for turning these insights into action — bridging strategy and execution to achieve lasting, scalable success.

1

Warm Introductions & Referrals

Effectiveness: 70% higher conversion rate than cold outreach (Source: LinkedIn B2B Institute, 2024)

Executives buy from people they trust. Referrals remain the single most powerful path to new business because they accelerate trust formation. A McKinsey study found that 82% of B2B executives rely on recommendations from peers when choosing a new service partner (Source: McKinsey, 2024).



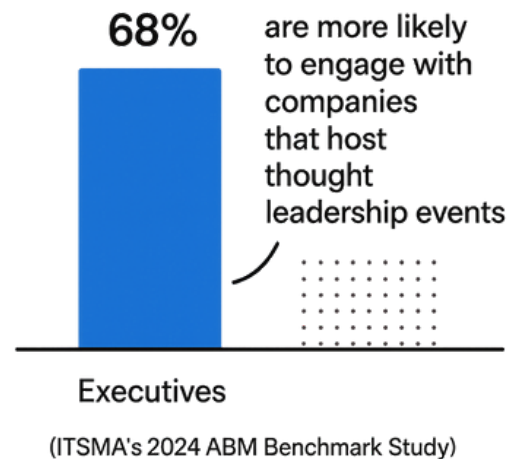
For professionals responsible for business growth, that means cultivating a network of satisfied clients, collaborators, and industry influencers. A single referral from a trusted relationship can outperform months of cold prospecting. Leverage platforms like Sam.ai & LinkedIn to identify shared connections, and encourage advocates—especially clients with measurable success stories—to make introductions. Combining social proof with personal endorsement humanizes your outreach and elevates your credibility instantly.

Thought Leadership & Roundtables

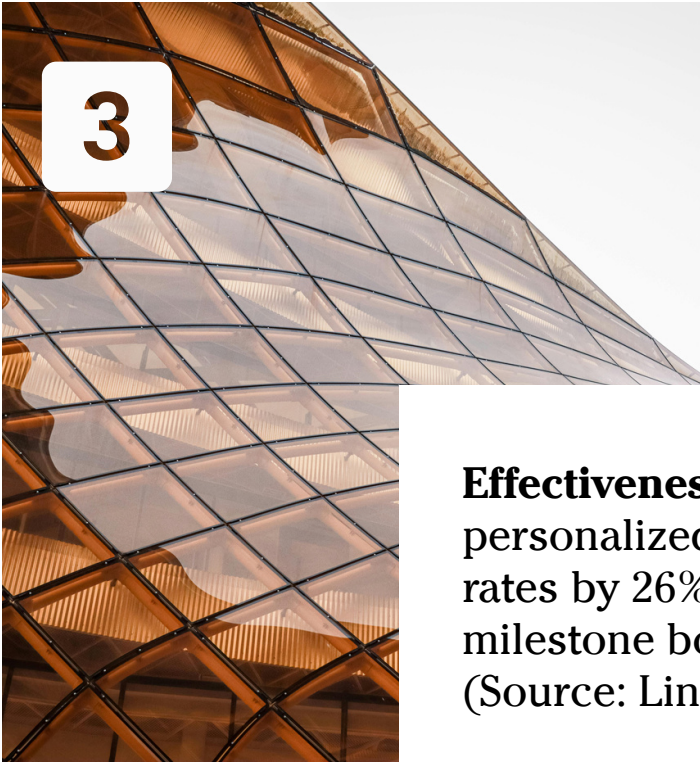
Effectiveness: 68% of executives are more likely to engage with companies that host thought leadership events

C-suite executives value dialogue, not sales pitches. Webinars and roundtables that focus on meaningful industry insights — such as emerging trends, market dynamics, or innovation best practices — position your brand as a peer rather than a vendor. According to ITSMA's 2024 ABM Benchmark Study, 68% of executives are more likely to engage with companies that host thought leadership events where peers exchange ideas and share real-world experiences.

Effectiveness



To succeed, focus on why these conversations matter — how industry shifts, technological change, or regulatory trends influence executive decision-making. Host sessions featuring respected voices, clients, and partners; invite targeted prospects; and foster open, insight-driven dialogue. These interactive forums create lasting connections and high-value follow-up opportunities. A well-executed thought leadership event turns participants into engaged relationships who view your brand as a trusted authority guiding the conversation.

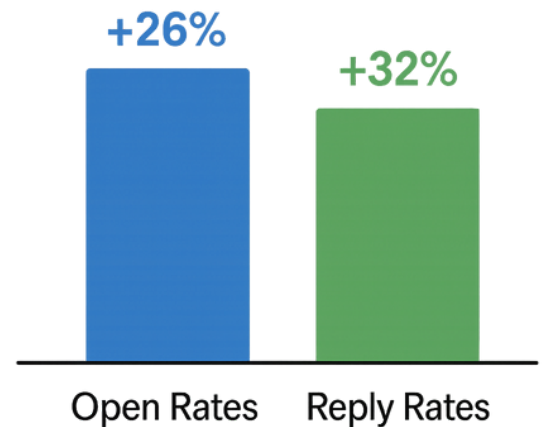


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Personalized Email Outreach

Effectiveness: LinkedIn data shows that personalized subject lines increase open rates by 26%, while referencing a company milestone boosts reply rates by 32% (Source: LinkedIn, 2024).

Despite the rise of automation, personalized email remains the backbone of C-suite engagement. The key is relevance. Executives respond when a message speaks directly to their priorities—portfolio optimization, tenant retention, sustainability, or capital efficiency. LinkedIn data shows that personalized subject lines increase open rates by 26%, while referencing a company milestone boosts reply rates by 32% (Source: LinkedIn, 2024).



(Source: LinkedIn, 2024)

Use specific business triggers to start meaningful conversations — such as a product launch, leadership change, market expansion, or strategic acquisition. Keep your outreach concise — ideally under 125 words — and focus on insight, not promotion. A strong message conveys awareness and curiosity: “I saw your recent expansion into the European market—several of our clients are navigating similar transitions and rethinking their go-to-market strategies. Would you be open to sharing perspectives?” That level of relevance and context earns genuine engagement.

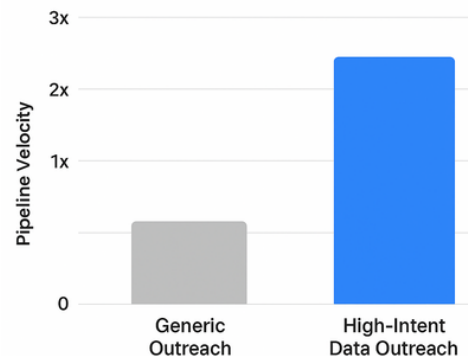
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High-Intent Data Outreach

Effectiveness: According to Gartner's 2024 report, organizations using intent data experience a 30% higher close rate.

Intent data reveals when executives are actively researching a topic or solution — an invaluable signal in any industry where timing influences outcomes. According to Gartner's 2024 report, organizations that leverage intent data achieve a 30% higher close rate. These insights can surface through indicators such as funding rounds, leadership changes, strategic partnerships, market expansion, or public initiatives — all signaling potential opportunity when approached with relevance and precision.

By leveraging high-intent insights, companies can prioritize outreach precisely when prospects are actively evaluating solutions. For example, a CFO engaging with content about “cost optimization” or “digital transformation” may signal a near-term buying window. Integrating these signals into your CRM or automation workflows ensures every call or email lands at the right moment — making your outreach feel predictive, not promotional.





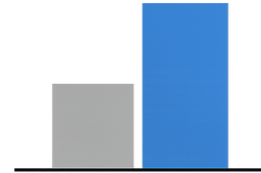
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Account-Based Marketing (ABM)

Effectiveness: According to McKinsey's 2024 study, firms that deploy ABM generate 208% more revenue from their top accounts.

In industries where deal values are significant and relationships are long-term, Account-Based Marketing (ABM) drives results by aligning sales and marketing around clearly defined target accounts. Rather than casting a wide net, ABM focuses on precision engagement — building meaningful relationships with decision-makers across a select group of high-value organizations.

208%
more revenue



(Source: McKinsey, 2024)

According to McKinsey's 2024 study, organizations that implement Account-Based Marketing (ABM) generate 208% more revenue from their top accounts. The key is personalization — tailoring outreach for each priority client with relevant insights, customized visuals, and coordinated multi-channel engagement across email, LinkedIn, and events. ABM transforms outreach into orchestration, where every interaction reinforces your understanding of the client's goals, challenges, and strategic direction.



LinkedIn Engagement

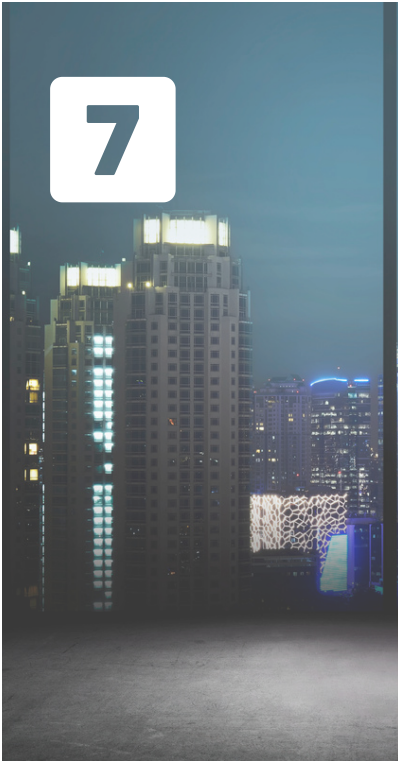
Effectiveness: Executives are 62% more likely to reply to messages from individuals they've seen interact on their feed multiple times.

LinkedIn remains the leading platform for building professional relationships with executives and decision-makers. However, effective outreach begins well before the first direct message. By engaging thoughtfully — liking, commenting on, or sharing relevant posts — you establish familiarity and credibility, creating recognition and trust before initiating a direct conversation.



(Source: LinkedIn, 2024)

Comment on leadership updates, share relevant insights, or tag executives in posts about market reports. According to LinkedIn's B2B Trends 2024 study, executives are 62% more likely to reply to messages from individuals they've seen interact on their feed multiple times. This approach mirrors real-world relationship-building: you show up, contribute value, and then introduce yourself naturally.



7

Personalized Video Messaging

Effectiveness: Vidyard's 2024 State of Video Selling report shows that personalized videos deliver 3x higher engagement rates.

In a world saturated with text, video humanizes communication. A short 60–90 second video can convey warmth, clarity, and professionalism that text alone can't. Executives appreciate the effort—it demonstrates intentionality. Vidyard's 2024 State of Video Selling report shows that personalized videos deliver 3x higher engagement rates.

personalized
videos
3x
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rates

(Source: Vidyard, 2024)

Use short, personalized videos to introduce a new offering, follow up on a proposal, or invite a prospect to an exclusive event. Speak directly to the camera, mention the executive's name, and reference a recent success, initiative, or industry trend. This personal touch breaks through inbox noise and leaves a lasting, human impression.

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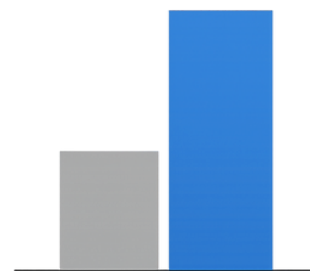
Cold Calling (with Intelligent Timing)

Effectiveness: Calls placed shortly after an executive interacts with your email, LinkedIn post, or webinar see up to a 4x higher success rate (Source: Gartner, 2024).

Cold calling is far from dead—it's just evolved. In 2025, effective calling isn't about volume; it's about timing and insight.

Calls placed shortly after an executive interacts with your email, LinkedIn post, or webinar see up to a 4x higher success rate (Source: Gartner, 2024).

up to
4x



(Source: Gartner, 2024)

For professionals selling to executives, intelligent calling can mean the difference between interruption and opportunity. Reference a specific article the executive engaged with, a recent company announcement, or an industry development they're connected to. Smart, well-timed follow-ups demonstrate attentiveness rather than persistence — turning cold calls into informed, meaningful conversations.



Retargeting Ads to Email Prospects

Effectiveness: According to eMarketer's 2024 study, retargeting increases lead-to-opportunity conversion by 26%

Retargeting keeps your brand within an executive's line of sight. In complex, high-value sales cycles, sustained awareness is essential. By layering LinkedIn or Google Ads alongside your email campaigns, you ensure decision-makers continue to encounter your brand as they research solutions, review partners, or engage with industry content — reinforcing familiarity and trust over time.

26%
lead-to-opportunity
conversion by

(Source: eMarketer. 2024)

This subtle reinforcement builds familiarity. According to eMarketer's 2024 study, retargeting increases lead-to-opportunity conversion by 26%. It's not aggressive marketing—it's intelligent repetition that makes your brand feel omnipresent yet organic.

Inside Track: Your Advantage with Sam.ai

C-suite outreach thrives on insight and timing — and that's where Sam.ai stands apart. Of the nine proven strategies in this playbook, six can be executed today with an authentic, agentic AI - unmatched by any other platform in the market - and built to help you realize your growth full potential

01 C-Suite Outreach & Ideal Client Persona

Sam.ai ICP Builder defines your Ideal Client Persona and pinpoints your best-fit markets — identifying up to 90% of total addressable contacts through precision filters and AI-driven data enrichment.

02 Warm Introductions & Referrals

Sam.ai Intro Generation uses advanced relationship science and neural network intelligence to map genuine connection strength—not just degrees of separation. It uncovers trusted pathways and recommends high-value introductions, redefining how professionals expand influence and trust.

03 Thought Leadership Roundtables

Sam.ai Roundtable simplifies thought leadership events with pioneering two-click registration and optimized turnout technology. It manages invites, reminders, and follow-ups seamlessly, helping you convene the right audience and strengthen your position as a trusted voice in your industry.

04 Persona Based Email Outreach (at scale)

Sam.ai Appointment Setter delivers persona-driven outreach by crafting hyper-personalized, context-aware messages tailored to each decision-maker. It uses engagement intelligence and optimized algorithms to schedule meetings with precision — ensuring every outreach feels relevant, timely, and authentic.

05 High-Intent Data Outreach

Sam.ai Intent Engine integrates live intent signals like funding rounds, expansions, and property activity — helping you reach decision-makers at the perfect moment.

06 Account-Based Marketing (ABM)

The Sam.ai Playbook Engine automates tailored multi-channel ABM campaigns, tracking engagement and refining strategy for continuous improvement.