



SalesPlaybook

The Ultimate Outbound Guide for B2B Entrepreneurs.

**How to build AI powered outbound sales as a
B2B entrepreneur without prior knowledge**

Florian Lussi



Transparency & References

You will find that I've copied a lot from thought leaders and practitioners in the field. My primary objective with this book is to provide you with the best resources there are on the topic of B2B cold outreach without altering them if they are on point. I give credit where credit is due; however, this is not an academic publication.

Warning!

B2B cold outreach is only one puzzle piece of a great go-to-market strategy or overall sales and marketing strategy. For some companies and industries, such as IT outsourcing and cybersecurity, cold outreach is notoriously difficult, and the ROI is often not there. Other industries and products will require trial and error, even for someone experienced with B2B cold outreach.

The space is evolving fast, and the innovators will survive. The best cold outbound talent understands that this is a process, and a learning mindset is the key to be successful.

Lastly, the book covers quite a bit of information on automation and AI tools. However, if you have only a few potential buyers (e.g., thirty Big Pharma accounts) you must take a hyper-“surgical” approach and do manual research for each prospect!

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Author: Florian Lussi, florian@thesalesplaybook.io

Website: www.thesalesplaybook.com

Sparring and Input: SalesPlaybook Team

This publication is designed to provide accurate and authoritative information regarding the subject matter covered. It is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional advice. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

This handbook is dedicated to entrepreneurs who often trade stability with constant change, stress, and long hours to drive change. I am privileged to collaborate with some of you.

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Structure of the Handbook

This handbook is broken into eight sections that build on each other. Let me quickly walk you through the main chapters:

- 01

Mindset: learn why the right mindset is vital to success in B2B cold outreach.
- 02

B2B Sales Fundamentals: learn the underlying fundamentals of every cold outreach, with concepts such as ideal customer profile (ICP) and total addressable market (TAM) and why they are important and set the stage for anything that follows.
- 03

Messaging: learn step by step to craft the “Ideal Messaging”
- 04

List Sourcing and Data Cleansing: learn to build a list with various data providers and then clean and/or filter it.
- 05

Enriching: learn to enrich the clean list with more data points & if useful AI.
- 06

Engaging by Channel: learn how to specifically reach you by Email, LinkedIn or Phone.
- 07

Landing Page Conversion Optimization: learn how to optimize important landing pages to increase the conversion of your outreach.
- 08

Thought Leader Interviews: learn how practitioners see cold outbound in 2024 and beyond.

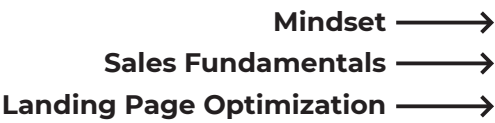
Market Segmentation
Total Address Market (TAM)
Ideal Customer Profile(s) (ICP)
Buyer Persona

Messaging
Ideal Message
Sales Story
Lead Magnet

List Sourcing
Sourcing
Triggers & Filters
Cleansing

List Enrichment
Contact Data
Prompt Engineering
Sanity Checks

Engaging
By Email
By LinkedIn
By Calling



Note: In practice, finding messaging, list sourcing & enriching is often an iterative process and not linear.

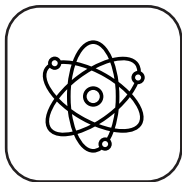
Symbols



Practice: Let's see how it's done in practice.



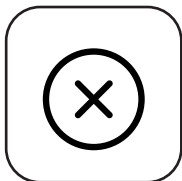
Case Study: Let's review a real outreach example



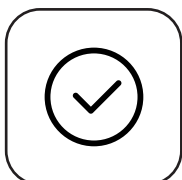
Theory: Let's see how it's theoretically done.



Important: Carefully read this.



Don't



Dos

Foreword

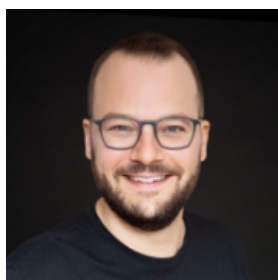
We are in times of economics uncertainties: budgets are getting tighter, margins becoming smaller and capital efficiency is the new buzzword. This has not only an impact on startups and scale-ups, but also professional service providers and agencies, who traditionally relied on their network and warm introductions.

Today, it's paramount that B2B entrepreneurs with growth ambitions develop new business beyond their own network & warm introduction. As the economic environment has become more demanding, the importance of efficient, effective, and innovative sales strategies becomes vital to grow.

This handbook is a comprehensive cold outbound guide that aims to empower B2B entrepreneurs, whether you're a seasoned B2B entrepreneur or first time startup founder.

The world of B2B sales is no longer just about knowing your ideal customer profile & your sales story; it's about leveraging technology to reach your target audience more effectively at lower costs.

Throughout the book, Florian provides real-world examples, case studies, and actionable advice. He lets you in on the of research & methodology that the team at SalesPlaybook has developed over the last years.



Jeremias Meier

Former CEO & Co-Founder Bexio
Partner session.vc

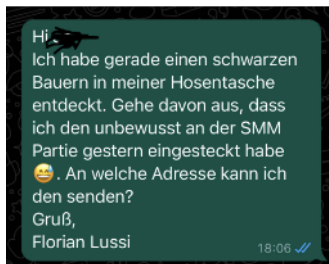
Intro

What Is Possible Today

The Pawn

A few years ago, I was playing a long chess game in the Swiss Team Championship. The next day, I found a black pawn in my trousers. Oops, I accidentally pocketed my opponent's pawn. What did I do next?

I've visited the website of my opponent's chess club, found a mobile phone number, and sent a WhatsApp message:



Now, you are probably wondering what this has to do with cold outreach. Bear with me for a few more seconds.

The Wallet

A while ago, my colleague Moritz found a wallet—no mobile number, no email, just an ID. He called the city police, who told him to bring the wallet to the station. That was not solution oriented enough to Moritz. He got the job done himself, and a few minutes later, Moritz had the wallet's owner on the phone and was ready to return it.

I asked him about it. "Moritz, that's really cool! How did you do that, exactly?" With a casual shrug, he said, "Easy. I found his LinkedIn profile, then enriched it in Clay with email and phone number. A quick call, and that was it. Thinking about it, it's actually quite cool how I can leverage my outbound skills in my private life." I nodded my head. "True," I replied, "It's time that I learn more about the topic."

If you've been around B2B cold outreach, that's not all that impressive. Still "The Pawn" and "The Wallet" are how solid cold outreach should ideally work, in my opinion:

- **Problem and timing:** You can solve a highly relevant problem for the wallet owner.
- **Data and channel:** You actually talk to the right person and leverage the most effective channel.
- **Messaging:** Your messaging or offer is on point, "Hi, I found your wallet and am happy to return it."

Relevant and Hyper-Personalized Outreach

Now, what's actually possible in 2024? Let me show you an illustrative example by one of my B2B cold outreach heroes, Eric Nowoslawski, who really opened my eyes to what's possible today in B2B cold outreach.



Imagine you want to run cold outreach for taplio.com, an all-in-one LinkedIn solution, including writing and scheduling LinkedIn posts.

How would you go about it?

Here is Eric's approach (shortened):

Email 1

Subject: saw your post

{{First name}} – Saw one of your recent LinkedIn posts about {{AI generation}}. Seems like the last time you posted was {{number of days}} days before that though.

If you're trying to build your brand on LinkedIn, have you considered using a scheduling tool?

Our scheduling tool can help write your posts and help you monitor social trends that you can riff on as well.

Let me know if this would be useful to you and I can send over access!

Signature

Email 2

{{First Name}} – I just saw your post about {{AI generation}}. It reminded me to follow up and see if you saw this!

Where Is B2B Cold Outreach Coming From?

To develop a better intuition of good and bad cold outreach practices, let's look at the following list by Alan Ruchtein (adapted) detailing the cold outreach of the past (bad) with the more effective cold outreach of today:

Cold Outreach in 2019:

- Sending copy/paste general emails to your whole contact list
- Talking about features and one problem at a time
- Sending a lot of: "I didn't hear from you" messages
- Not a trigger-based approach/strategy
- Automating all your sales processes
- Being product-feature-centric and overwhelming the prospect
- Pushing your company benefits and demanding a meeting
- Sending unlimited emails without any interaction on other channels
- Giving up after the first email sent
- Using hard calls to action (CTAs) (What about a one-hour meeting today?)
- Using long, non-relevant, salesy subject lines
- Always sending the same sequence to all the prospects no matter what

Cold Outreach in 2024:

- Sending highly targeted and relevant emails
- Talking about one problem and one solution per email thread
- Sending value and bump emails to leverage the familiarity law
- Sending short and mobile-friendly emails (50–100 words max)
- Creating customer-centric messages—using "you" and "your" instead of "me" and "I."
- Offering free value in your messages (resources - articles - blogs)
- Using a multichannel strategy (email, LI, phone and video)
- Utilizing a social selling strategy in your sales game
- Using interest-based CTAs (Mind if I share a resource?)
- Using short and boring subject lines (3–5 words)
- Multi-threading to multiple buyer personas per account

This handbook's objective is to enable you to run cold outreach for 2024 and beyond.

Mindset

Regardless of how sophisticated your cold outreach is, you will not be successful if you do not bring the right mindset to the table.

Sales Mindset

Often, salespeople are portrayed in movies as slick and manipulative. Stick to the following two fundamentals to not be put into this category of seller (adapted from Ryan Reisert):

Fundamental #1:

Nobody cares about your products. People care about themselves and their problems.

Now you may object and say, "That only holds true for bad products or without product-market fit." To which I'd direct you to fundamental #2:

Fundamental #2:

Wrong, solve a problem or go away.

Sounds pretty harsh, but this really must sink in. Your job is to source, engage, and close buyers who have problems that your product or service is solving.

From the Fear of Rejection to the Right Mindset

If you have never done cold outreach, regardless of cold calls, cold LinkedIn, or cold emails, it feels just strange. Every week we hear clients say:

"I don't want to be pushy or aggressive like those salespeople who call and try to sell something."

Right mindset: Your role is to provide value and solutions. You are reaching out to potentially help businesses overcome problems and challenges, not just to make a sale.

"I don't want to annoy people with my calls or messages."

Right mindset: You are offering relevant information and opportunities that could be beneficial. If it's not the right fit, that's okay. Your intention is to be helpful, not intrusive.

"What if they reject me outright?"

Right mindset: Rejection is not personal. It's a normal part of the sales process, and each no brings you closer to a yes. Every interaction is a learning opportunity.

"I'm concerned I'll say the wrong thing and ruin the opportunity."

Right mindset: Every conversation is a chance to improve. Mistakes are part of the learning process, and each interaction helps you refine your approach.

And it's true, you probably also receive some terrible cold emails and calls on a weekly basis, but are you really bothered by them? Usually not. Actually, if I receive a half-decent cold email or call, my interest is usually piqued.

Change of Perspective

Most of the cold outreach I receive is really bad and not targeted at all. Have you ever received a cold call **without** background noise and the cold caller actually invested five minutes in researching you? Or have you ever received a cold email that was succinct and relevant to you?

It still rarely happens to me, but if I get something halfway decent, I usually answer. Why would you not answer someone who understands your current situation and problems and does this with an uplifting tone? It's really not so difficult to stand out.

Yes, there will always be a few a-holes that give you a hard time. But most successful professionals will tell you either, "Yes, that's interesting," if you are really relevant to them, or, "No, but thanks for the outreach."

Cold outreach is not rocket science. It's quite simple but not easy. Let's look at the 3Cs that will help you tackle it with the right mindset.

The 3Cs to Success

In today's rapidly changing cold outreach environment, the right mindset is key. This includes having curiosity, courage, and creativity.

Curiosity: The space of cold outreach is changing faster than ever before. New tools, new automations, and new databases become available, and others become irrelevant or very expensive. The key is to stay curious and relevant. If you reach out to a new ICP (ideal customer profile), your first script won't be the best—continue to A/B test and stay curious. The best in the cold outreach game have an approximate idea of what can work in a certain industry and buyer persona, but then they let the data speak for itself and iterate fast.

Courage: If you are new to this, that's really a tough one. Reaching out to total strangers can be quite a challenge. "Oh, I don't want to annoy people." "What if they are pissed about my message?" Blah, blah, blah—this is all mental noise. If you had a gun to your head, you wouldn't think a single second about that. What we've seen again and again is that successful entrepreneurs and sellers act in the realm of what they can control: you can control input and your intention. You can't control your reaction and others' emotions.

Creativity: If you leverage artificial general intelligence alongside powerful databases, triggers, tools like Clay.com, and creativity, you can construct an exceptionally potent outreach engine. It's really about combining these resources with the right ICP and relevant messaging that drives results.

Now, as you understand what I consider the right mindset for cold outreach, let's dive into the fundamentals of B2B cold outreach.

B2B Cold Outreach Fundamentals

Sales Strategy Fundamentals

Even though this is a handbook for outbound sales, outbound is only a part of your overall sales (-marketing) strategy and success. Broadly speaking, there are three pillars you have to consider when defining your overall sales strategy:

1. **Generating a qualified pipeline:** Cold outbound can massively contribute to this, but there are other important sources that generate a pipeline. Your job is to find the most effective channel(s):

- LinkedIn, email, calling
- Inbound-led outbound (white paper: thesaelsplaybook.com/out-in)
- Paid ads (demand gen and lead gen)
- Referral and partner programs
- LinkedIn content, webinars, events, white papers

2. **Closing:** Cold outbound can generate a qualified pipeline, but you must have a team in place that can close deals predictably by leveraging the following:

- Seller enablement and coaching
- Discovery quiz: Only talk to prospects that are ICPs
- Case studies/testimonials and reference calls to increase trust and conversion

3. **Scaling:** Cold outbound generates new contacts. You want to have a single source of truth in place and the right tooling around it to enable your team and cut down on manual labor.

- Single source of truth = CRM including the following:
 - Integration of outbound tools
 - Workflows to enable sellers and keep the CRM clean
 - Dashboard to understand where your business and outbound motion is going

You want to allocate your finite resources where they bring you the highest ROI. This may or may not be cold outreach. Often you only find out by running smart experiments.

Outbound Strategy Fundamentals

Before we dive into the technicalities and details of cold outbound, let's take a step back and understand three important concepts.

An important concept that you should keep in mind when designing your outbound strategy is *demand generation versus demand capturing*:

- **Demand capturing:** Focuses on the 1–3% of buyers who are actively considering a purchase.
- **Demand generation:** Focuses on 97–99% who do not show buying intent right now. But you still want to build awareness and interest so they will think about you when they are ready to buy.

Typically, with an outbound motion, you want to **capture demand**, and that is the focus of this handbook. However, you can also use cold outbound for demand generation by asking prospects to participate in industry events or benchmark surveys. These are much more about educating your prospects rather than getting them onto a call. (See thesalesplaybook.com/out-in.)

A second important concept is buyer awareness, how aware your potential buyers are about your product. If buyers are unaware of your solution, much more education and nurturing is required before you are even on their radar. On the other hand, if a prospect is highly aware of a solution, multiple solutions often exist, and you need to come at them with an excellent offer.

A third important concept is *inbound versus outbound customer journey*.

I like to think about it in terms of how much energy it takes to bring water to boil. So if a prospect already came to your website, watched your content on LinkedIn, and then booked a meeting including a discovery quiz, the prospect is much closer to the boiling point than someone you reach out to cold. Meaning, in cold outbound, you often need much more energy to convert the prospect to a customer, which you should take into account when you design the customer journey.

Again, only a fraction of your total addressable market (TAM) is ready to buy today. Let's look at how you can define your TAM and how this is important for your outbound motion.

Total Addressable Market (TAM)/Per Lead Resource Allocation



*TAM in cold outreach is usually referred to as the **total number of companies that could become your customer**.*

In B2B cold outreach, it's really important to understand how many target accounts you have. Why? Because it determines the type of outreach motion and resources you spend per target account.

For example, if you are running a typical B2B DACH mid-market/enterprise sales motion to one hundred to one thousand target accounts, you don't want to burn through your target accounts by sending them a plain seven-step sequence every month that they are so annoyed by you that they will never reconsider. Instead, you should spend more resources on your ideal message and a more sophisticated outreach to make a lasting impression.

At the same time, if your TAM is eighty thousand companies, you can burn through quite a few target accounts, which means even if you are reaching out to five thousand accounts a month, you will only reach out to the same five thousand companies sixteen months from now.



Let's review a recent illustrative client example:

We found that our client roughly has to outreach to 100 target account in order to book a discovery call. Their goal is to book 25 discovery calls per month from cold outreach.

100 outreaches = 1 discovery call

2,500 outreaches = 25 discovery calls

It makes a huge difference if their TAM is 10k target accounts or 50k target accounts.

With a TAM of 10k target accounts, they've "burned" though all the target accounts, and it makes little sense to reach out to the target accounts again after four months, as not enough has changed in their business. You'd rather allocate more resources for a more sophisticated outreach with higher conversion.

On the other hand, with a TAM of 50k target accounts, you will only burn through all the target accounts after twenty months, which means (a) Most people forgot that you've reached out and (b) the business could have change enough that your value proposition makes sense.

Alright, you've learned about TAM and why it's important for the cold outreach. Let's now segment your market and understand your ideal customer profile (ICP).

Market Segmentation and Ideal Customer Profile (ICP)

In this section, we will quickly go over the key concepts of market segmentation and ideal customer profile (ICP). Understanding these are crucial—get them wrong, and your outreach effort could yield very weak results.

Imagine you're selling a basic, non-customizable bookkeeping CRM solution which is only available in German



Now you are reaching out to CFOs of large French corporations with complex accounting needs. You won't get many positive replies. Why? Wrong ICP.



A much better approach would be targeting Swiss B2B companies in German-speaking Switzerland with two to fifty employees, in software sales and professional service, and reach out specifically to CEOs and CFOs. Or alternatively, reach out to the accountants of these companies.

Yes, this is a dull example, but if you don't reach out to the ideal customer, you won't succeed with cold outbound. What if you don't know your ICP? Then it's high time to run hypothesis-driven experiments and interviews to find your ICP. (Check out thesalesplaybook.com/out-icp.)

Deconstruction of the ICP

The ICP consisting of a target account and buyer persona is the result of your market segmentation:

Target account: The specific companies you want to target. For example: IoT companies in Germany, 1M–10M EUR in revenue.

Buyer persona: The specific buyers within that target account you want to reach out to. For example: head of sales with 0–1 year of experience in this role, with the objective to double sales in 2024:

Market Segmentation

Here is a step-by-step guide to segment your market and narrow your ICP:

Step 1: Broadly define your TAM with the following criteria:

- Geography and language
- Size of business/revenue
- Industry

Step 2: Find further criteria to define your market even tighter:

- Age of business
- Software tool stack
- Sub-industries
- Business growth/decline
- Organizational complexity
- Any special criteria to narrow your ICP

Step 3: Define your buyer persona:

- Job titles
- Activities and objectives
- Budget authority
- Pain points

Important, for your ICP you are (a) important problem (b) they budget to pay you! It's always both! Typically, you arrive at a mix of classical, custom, and strategic criteria.

You can find our worksheet under thesalesplaybook.com/out-icp.

Anti-ICP

Defining the opposite of what you want makes your ICP even clearer.

ICP Hypothesis

Depending on where your business stands and who your customers are, you may understand your ideal customer profile (ICP) or you may still be working with one or multiple hypotheses. Either way, you can begin your outbound efforts.

However, if you're still figuring out your ICP, you want to conduct several parallel outbound experiments. This approach helps you test various hypotheses about your ICP, allowing you to (de-)validate based on the results.

Let's close this chapter with fundamental truths about cold outreach.

Cold Outreach Axioms

What is fundamentally true and will stay true about cold outreach (adapted from Ryan Reiser).

Fundamental #1: Most communication channels are useful, some of the time, with some prospects.

This can be tricky. If you suck at cold calling or can't craft an effective cold email, how will you be able to effectively evaluate the channel?

Fundamental #2: No one waits for your cold outreach.

Businesses and buyers don't set up emails, phones, or LinkedIn to get a cold outreach pitch.

Fundamental #3: despite fundamental 2#, cold outreach can be incredibly successful.

Yes, cold outbound is an intrusion of some sort. All forgiven, if you are solving a problem for the target, if you reach out to your ideal customer profile for whom you solve a real problem, you have a great shot at helping them instead of bothering them.

Now, as you understand to whom to outreach and what the underlying cold outreach fundamental are, let's craft the ideal message to this buyer persona.

Messaging

Alright, you've got your ICP nailed or have a solid hypothesis, but what's the formula for great cold outreach messaging? Let's start with the sales story, which later will help you to craft your ideal message.

Sales Story

- **Problem (Why?):** What problem do you solve for the company? Why has your target customer not yet solved that? What happens if the customer does not solve the problem within three months?
- **Solution (What?):** What exactly can you do for the company? How do you fit into the customer's setup (org. structure, goals, roles, and responsibilities)?
- **Buyer (Who?):** Who at the customer needs you and for which reasons? "What's in for me?" for the company's CEO, CFO, head of R&D etc.?
- **Objection handling (Why still yes?):** What concerns may your contact have for you? How can you resolve these proactively?
- **Testimonials (Why trust?):** How can you leverage social proof and testimonials to build trust with your target customer?
- **Risk reversal (Why now?):** How can you reduce risk for your customer?
- **Differentiator (Why you?):** What is your biggest selling point? For this deal, what is the one relevant thing you can do better than anybody else?



Let's review a practical example of this for the SalesPlaybook Outbound Service:

Problem:

- No outbound mindset, skillset, or toolset: You and your team have never been successful in outbound sales.
- No scalable approach: You source and contact people manually, with low success but high effort.
- No path from lead to customer: You get some replies to your outreach but fail to convert these to customers.

Solution:

- Outbound lead engine: Generate new leads consistently with a repeatable, automated, and insight-driven process.
- Qualification engine: Understand if somebody is a fit without the need for a thirty to sixty minute call.

Buyer:

- B2B SaaS and professional service entrepreneurs between EUR/CHF 1 and 20 million in annual revenue, willing to invest EUR/CHF 20k–100k per year.

Testimonial

- 50+ subscriptions from <10 projects by building outbound lead generation from 0 (Airica)
- 30k ARR deal from leveraging video sales letters and LinkedIn (care4IT)
- 18% booking rate on cold email, accelerating market validation by months (iCEEP)
- <5% to 80% opening and 30%+ reply rates on scalable outbound sales (TRESIO)
- 90% reply rates on cold email campaigns (Classtime)
- 30% booking rates on cold email campaigns (Wowflow)
- 5x SQLs in 6 months (Morphotonix)"

As you understand to whom you are reaching out and what your overall sales story is, you are now ready to craft the ideal message.

The Ideal Message

What would you say to your ICP prospect if you had all the resources in the world to craft a message? Or more realistically, what would you say if you had fifteen to thirty minutes of research available per message?

These are your guiding questions to get to the ideal message. Once you know the ideal message, you can work backward to see what's possible with reasonable effort.

Now, you probably wonder what your ideal message even looks like. Let's check out two powerful frameworks that helped me craft many cold emails.

Another way to think about your ideal message is to ask this question: What can you say that your competitor cannot?

1. The Trümpi Cold Outreach Messaging Framework

I learned this framework a while back from seasoned and highly successful head of sales Patrick Trümpi. Patrick is still using it in 2024.

- **Relevant social proof:** Show proof that you've solved problem x consistently for similar customers.
- **Challenge/problem:** Describe the problem the prospect currently faces (in their language!)
- **Solution and impact:** Describe your solution and the business impact it achieved.
- **Call to action (CTA):** Ask the prospect if they are facing similar challenges. Do not ask for a call right away (hard CTA).

Let's check out the framework in action:



Unique Case Study

Unique is a Swiss B2B SaaS company that aims to increase productivity by automating manual workload through AI and ChatGPT solutions.

Bad outreach example:

Hey Alexander

My name is Patrick and I am the CSO at Unique.

We built a state-of-the-art revenue intelligence platform that help our customer make more money and reduce admin.

The following features could be interesting for you:

- Automatic call summaries
-
- Transcription in Swiss German

I would really like to set up a call with you and discuss potential opportunities and hear your challenges.

Are Do you have time on the 3rd March or 4th March at 2pm?

Kind regards,

Patrick



They can read that in the signature. No "me" focus, nobody cares



No marketing blabla. Nobody knows what that means



No feature dump



Nobody cares what you would like



No hard CTAs

Actual Outreach and Good example:

Hey Alexander

Many contact centre managers in the financial sector with whom we work (e.g. Allianz, Raiffeisen, PostFinance, AXA, Pictet) have the following challenge:

The agents typically need between 1-5 min for the follow-up of the calls, partially for taking notes. This can amount to up to \$640,000 per year.

With our solutions, you'll get live transcription and summaries of calls with direct CRM entries. This method cuts the note-taking time to 15-20s. Additionally, it standardises CRM data storage.

Are you facing a similar challenge?

Kind regards

Patrick

Source: Patrick Trümpi



This framework is pretty straightforward and still works pretty well in Switzerland and Germany in 2024. However, you really have to nail the wording (speaking in the language of your prospect) and be spot on with the challenge.

There is a second cold outreach framework I really like that we deploy at SalesPlaybook.

2. The Nowoslawski Cold Outreach Messaging Framework

The second framework is a bit more elaborate. I learned about it from Eric Nowoslawski (who adapted it to my knowledge from Alex Hormozi's book \$100M Offers).

Let me quickly walk you through the three components before we dive into the specifics:

- 1. Problem “sniffing”:** Do research to infer that your ICP has an important problem and has a budget.
- 2. Extremely relevant social proof:** Give proof (i.e., case studies and testimonials) that you've done work for similar companies/industries with consistently great results. You could run entire campaigns based on that.
- 3. Lead magnet:** Give a free offer of value to prospects in return for call or contact details. The lead magnet is often a fallback strategy if you can't do powerful problem sniffing.

Problem sniffing and extremely relevant social proof are both great but have limitations:

Sometimes there's no way to infer a problem or you do not have the right case studies. If this is the case, then use the lead magnet as a fallback strategy (catch-all).

1. Problem Sniffing



Example Parking Lot Holes:

Let's imagine you fix holes in the parking lots of restaurants. What could be an ideal message to the owner of a restaurant with holes in the parking lot?

How about:

*Hi Matt,
I've seen that a few of your customers left a review complaining about the holes in your parking lot. Shall I come by and fix them?*

Let's now work backward from the ideal message. We want to find restaurants that have holes in their parking lot. In cold outreach, this is also called problem sniffing. You essentially try to predict who has the problem and reach out only to them.

How is it done? Scrape Google Reviews of all restaurants in your region for the last six months, and let ChatGPT search through all the reviews and pinpoint comments on the parking lots.

Example OneSchema: Let's imagine you are the head of sales for **OneSchema**, and their product is a CSV importer: "Stop manually fixing your customer's data and delight them with frictionless CSV import."

What could be an ideal message you could send to their buyer persona (CTOs and heads of products)?

*Hi Christoph,
I've seen that a few of your customers left a review complaining about your CSV import function...*

Again, we could reverse engineer that by scraping G2 and Capterra and use ChatGPT to search through all the reviews and pinpoint the relevant ones.

Example Source: Eric Nowoslawski

Both examples greatly illustrate the following:

- Sales Fundamental 1: focus on the problem.
- Relevancy trumps anything else.

Obviously, the above examples come pretty close to an ideal world with perfect information. In reality, though, it's not always that easy.

We will cover problem triggers in more depth in the chapters “Sourcing” and “Enriching.” Here are some other ideas to develop your intuition for problem sniffing. Look for clients doing the following:

- Doing a funding round
- Expanding/relocating
- Experiencing declining web traffic
- Hiring for specific roles/layoffs
- Getting negative online reviews
- Getting negative press coverage
- Using specific tools

Problem sniffing requires a deep understanding of your ICP. Sometimes problem sniffing is just not possible. That's why the next two components in the framework are extremely important.

2. Extremely Relevant Social Proof

What is extremely relevant social proof?

It's proof that you've solved problem x consistently for similar customers. You typically do this with quantified case studies and testimonials.

- **Average example:** We helped another SaaS company increase their revenue by 150%.
- **Good example:** We helped another DACH B2B SaaS in the mobility sector to increase their revenue by 150% by building up their cold calling outbound engine. The strategy can be copied and pasted in your market.

A good case study always states the problem you've solved and what metrics you've impacted (ROI estimator).

Don't have powerful case studies available? Check out the “Case Studies and Testimonial” section in the “Landing Page” chapter.

If you were not able to infer a relevant problem and do not have relevant social proof, then your fallback strategy is a lead magnet.

3. Lead Magnet

Lead magnets are free and offer real value to prospects in return for call or contact details.

Ideally, you create a lead offer with low effort for you and high value for your prospects. The lead magnet should be so good that an ICP prospect can't say no, so typically it's not yet another webinar or standalone white paper unless it's really good.

Here are two lead magnet examples for a B2B sales implementation partner and training boutique:

- **Sales sparring session:** SalesPlaybook has worked with over three hundred B2B companies on their B2B sales challenges. Some prospects appreciate a thirty-minute sparring session, where we share our B2B sales insights/market trends but most of all try to understand the prospects' challenges better.
 - **Effort:** High | **Prospect Impact:** High
 - **Messaging:** Hey, I saw that you recently raised 2M in funding. I figured as you are hiring for new 3 SDRs and 2 AEs you're building your sales engine. We have helped over 300 startups scale sales. Happy to jump on a 30-min call for sparring and evaluate if it makes sense to collaborate.
- **Startup sales summit:** A virtual event with 13 top-notch keynote speakers, discussing the latest trends in B2B sales but also sharing their hands-on tactics and how-to guides.
 - **Effort:** Medium | **Prospect Impact:** Medium
 - **Messaging:** In 2023, we hit capacity with 1,000+ registered participants. This year, we're leveling up. The impact is high, seats are limited. Secure your spot now: register now for free!

To come up with your lead magnet, think about something you are uniquely positioned for that is currently charged for in the market, and you can provide it for free at reasonable costs for your company.

Typically, a low-effort lead magnet is free elsewhere as well (webinar, white paper, etc.), whereas a high-value lead magnet is lots of effort (real sparring session, on-site events, etc.)

Here is how to create your lead magnet step by step:

1. **Dream outcome:** Define the dream outcome for your prospect.
2. **Problem and solutions:** List every possible problem and solution for your customer.
3. **Delivery method:** Think through how you can deliver what you are offering in the best way possible.

Example ICP: B2B SaaS companies struggling to integrate AI into their sales strategies.

Dream Outcome for Prospect: Seamlessly integrate AI into their sales process to enhance lead generation and customer engagement and ultimately drive revenue growth. The ideal scenario is a sales process that's more efficient, predictive, and personalized, leading to higher conversion rates and customer satisfaction.

Problem and Solutions

- **Problem:** Need tailored advice on integrating AI into their sales process.
 - **Solution:** Offer a thirty-minute personalized consulting session to discuss specific challenges and opportunities regarding AI in their sales strategy.
- **Problem:** Difficulty in understanding and leveraging AI for sales.
 - **Solution:** An in-depth guide or webinar on the basics of AI in sales, including case studies of successful integrations.
- **Problem:** Inadequate tools or platforms for effective AI integration.
 - **Solution:** A comparison sheet or toolkit that reviews the best AI tools for sales, tailored to various business sizes and industries.
- **Problem:** Uncertainty about the ROI of AI in sales.
 - **Solution:** An ROI calculator or interactive tool that helps businesses estimate the returns of implementing AI in their sales processes.
- **Problem:** Lack of skilled personnel to manage AI-driven sales processes.
 - **Solution:** Access to a training session or e-course on upskilling sales teams for AI integration.

Delivery Method

For consulting session: Set up a call-booking page (e.g., Calendly). Ensure that prospects complete a short discovery survey before they are eligible to book the session. Run the session. Ensure the session is structured yet flexible enough to address the unique concerns of the prospect. Automate the follow-up as much as possible.

For guides/webinars: Host these on a dedicated landing page on your website. Use a simple sign-up form to collect lead information. Ensure the content is easily accessible yet gated to capture leads.

For toolkits/comparison sheets: Create downloadable PDFs or interactive web tools. These should be visually appealing and easy to understand and provide actionable insights.

For ROI calculators: Develop an interactive digital tool embedded on your website. This tool should be user-friendly, allowing prospects to input their data and see potential ROI from AI integration in sales.

For training sessions/e-courses: Offer sign-up through a webinar platform or your website. Ensure there's a follow-up system to engage those who sign up, possibly through a series of emails providing additional value and insights.

Lastly, I want to share another lead magnet that I was on the receiving end of recently and I like. It's an invitation to participate in a benchmarking study that is relevant to me. Results, insights, and recommendations were provided in real time and tailored to my answers.



Benchmark Lead Magnet Example :

Hallo Herr Lussi

In Gesprächen mit COOs wird das Dilemma diskutiert: schnelle Marktreaktion und Widerstandsdurchbruch. Steigende Anforderungen an SaaS, Startups, B2B-Vertrieb.

Wir haben Einblicke von Experten und aus Praxisprojekten in einem Benchmark zusammengetragen, die ich gerne mit Ihnen teilen möchte.

Investieren Sie 60s in das Online-Assessment: Kurzumfrage starten

Was springt für Sie dabei heraus?

- Entdecken Sie, welche Führungsinstrumente im Wettbewerb um Kunden und Mitarbeiter überzeugen.
- Vergleichen Sie Ihr Unternehmen mit der Branche und gewinnen Sie strategische Einblicke.
- Erhalten Sie exklusiven Zugang zu unseren anonymisierten Studienergebnissen.

Beste Grüsse

Reto

P.S.: Nach Abschluss der Umfrage erhalten Sie automatisch generierte Vorschläge zu passenden Management-Tools (Beta).

Führungsinstrumente im Check – Was überzeugt Kunden und zieht Talente an?

Die Anpassung bewährter Führungsinstrumente an die dynamischen Veränderungen der digitalen Ära & KI

Die Herausforderung in Unternehmensberatung:

Management-Tools müssen dringend für das digitale Zeitalter und KI-Einsatz aktualisiert werden. Es gilt, schnell auf Veränderungen zu reagieren, KI einzubinden, Innovationskulturen zu schaffen und alte Widerstände zu überwinden, um Mitarbeiter und Kunden langfristig zu begeistern.

Um sowohl das bestehende Geschäftsmodell zu erhalten als auch neue Wachstumschancen zu gestalten, erfordert dieser Wandel eine Anpassung der Führungsmethoden:

Jetzt teilnehmen und die Zukunftsfähigkeit des Geschäftsmodells überprüfen!

Bewerten Sie strategische Einblicke der Experten und vergleichen Sie Ihr Unternehmen mit der Branche. Finden Sie in nur 60 Sekunden heraus, wie führende Unternehmen sich auf die Zukunft vorbereitet und ihre Führungspraktiken effektiv gestalten.

- Assessment beantworten: Sehen Sie, wo Sie im Vergleich zu anderen Unternehmen stehen.
- Strategische Einblicke: Gewinnen Sie Klarheit über die Effektivität Ihrer Führungspraktiken.

✉ E-Mail wird vertraulich behandelt ⌚ Dauert 60 Sekunden 🔒 Daten werden anonymisiert

[Jetzt Assessment durchführen](#)

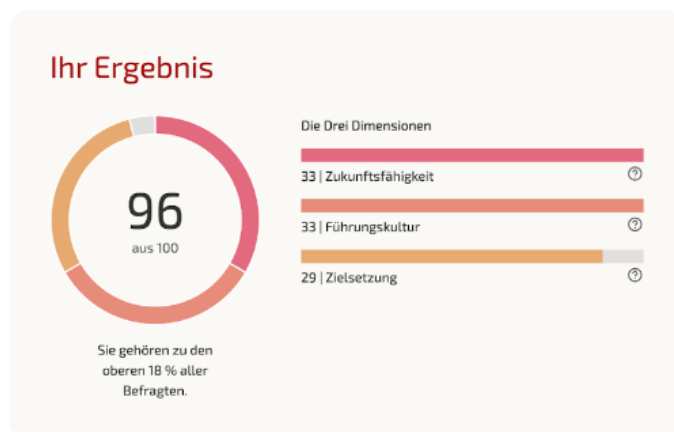


● Durchschn. ● Sie

Beispiel für einen personalisierten Bericht

[Beispiel ansehen](#) ↓

The tool provides a live benchmarking, which is nice, and a great discovery quiz for the service provider.



Vielen Dank für Ihren Beitrag. Lesen Sie mehr über [worauf es ankommt bei modernen Führungsinstrumenten](#).

Übersicht moderner Führungsinstrumente

Diese Tools fördern Innovationskraft, Mitarbeiterengagement und Agilität. Gleichzeitig bieten sie eine klare Vision und strategische Ausrichtung. Das hier sind die wichtigsten:

- **Agiles Management:** Ein Ansatz, der sich durch hohe Flexibilität, effektive Arbeitsabläufe und rasche Ergebnisse auszeichnet.
- **Design Thinking:** Probleme lösen durch Kreativität. Design Thinking bezieht viele

Vergleichen Sie Ihr Unternehmen



● Durchschn. ● Sie

Ihr Ergebnis

Vielen Dank für Ihre Teilnahme an der Studie "Führungsinstrumente im Check – Was überzeugt Kunden und zieht Talente an?". Basierend auf Ihren Antworten erhalten Sie von uns ein Feedback zu Ihren Ergebnissen. Im Vergleich mit anderen Teilnehmern schnitten Sie wie folgt ab:

Dimension Zukunftsfähigkeit: Ihr Durchschnittsergebnis in dieser Dimension liegt bei 50%, während der Durchschnittswert bei 79% liegt. Ihre Punktzahl ist damit unterdurchschnittlich.

Dimension Führungskultur: Hier haben Sie eine Punktzahl von 50% erzielt, verglichen mit dem Durchschnittswert von 84%. Auch in dieser Dimension liegt Ihr Ergebnis unter dem Durchschnitt.

Dimension Zielsetzung: Ihre Punktzahl beträgt 50%, verglichen mit dem Durchschnitt von 79%. Damit liegt auch hier Ihr Ergebnis unter dem Durchschnitt.

Es ist wichtig zu betonen, dass die Dimensionen Zukunftsfähigkeit, Führungskultur und Zielsetzung wesentliche Merkmale für die erfolgreiche Führung und Entwicklung eines Unternehmens darstellen.

Um Ihr Unternehmen weiterzuentwickeln und Ihre Führungspraktiken zu optimieren, empfehlen wir, sich mit modernen Führungsinstrumenten vertraut zu machen, die Innovationskraft, Mitarbeiterengagement und Agilität fördern. Einige wichtige Instrumente, die Ihnen dabei helfen können, sind unter anderem Agiles Management, Design Thinking, Positive Leadership, OKRs (Objectives and Key Results), 360-Grad-Feedback und strategisches Storytelling [16|Quelle] .

Es ist wichtig, dass diese Instrumente nicht nur verstanden, sondern auch aktiv und konsequent in die Unternehmenskultur integriert werden, um ihre volle Wirkung zu entfalten. Wir ermutigen Sie, diese Empfehlungen in Ihre Führungspraktiken zu integrieren, um die Zukunftsfähigkeit, Führungskultur und Zielsetzung Ihres Unternehmens zu stärken.

Wir stehen Ihnen gerne zur Seite, um Sie auf diesem Entwicklungsweg zu unterstützen. Wenn Sie weitere Fragen haben oder zusätzliche Einblicke wünschen, zögern Sie bitte nicht, uns zu kontaktieren.

Freundliche Grüsse

Let's recap. Ideally you can find or infer a really relevant problem and add relevant social proof. If you cannot do either of these, create a lead magnet. Now, we will look at some other campaign angles that you can play with.

Other Campaign Ideas and Angles

Here are some more ideas and angles on how you could do outreach. As always, you want to A/B test and be aware of the impact on your company's reputation.

Demonstrate – walk the talk

A powerful campaign angle is to show what you have to offer, not just tell your prospects about your offering. E.g., if you are a lead-gen agency, send your prospects three thousand highly relevant leads for free. If you are building a real-time collaborative content editor like TipTap, show your prospect an example how the editor would look/work in their world.

Create campaigns with humor: Emails that amuse are more likely to receive a response. Key is to stay on-brand and relevant. Steer clear of overused memes, like dog memes, unless they align with your brand identity.

Do targeted outreach: Leverage data and AI to identify prospects who are ready to buy. You engage only when certain criteria are fulfilled, such as a founder's history and their hiring trends. This method excels in extensive target markets. For a lead gen agency that could be as follows:

- The DMARC record on their website is incorrect
- This is their first time being a founder
- They have a technical background
- They have a salesperson but no VP of sales
- They are hiring for more salespeople

Be genuinely useful: Offer insights without expecting an immediate return. For example, inform a company about unapproved Airbnb listings in their building, fostering opportunities for future sales dialogues.

Write concise emails: Emails limited to two sentences, marrying relevance with an appealing proposition, effectively engage prospects. For instance, propose a tech audit based on a prospect's existing tech infrastructure.

Use the “flash roll” concept: Convey your expertise in emails succinctly. Rather than a standard spiel, explain the unique way your service addresses a challenge, thus building trust and arousing curiosity.

List Sourcing and Data Cleansing

We've defined our ideal customer profile and crafted our messaging. Next, we need to source data. It's important to remember that messaging, sourcing, triggers, and enriching data interact closely. Let's agree on a few definitions, so we are all on the same page.

Sourcing is the process of identifying potential leads, for example, through databases. It's finding leads that could be interested in your product or service.

- **Scraping:** Scraping automates data extraction from online sources to quickly gather leads' details, enhancing sourcing by expanding potential customer pools with up-to-date information for targeted outreach.
- **Trigger** events are specific occurrences or changes within a company or industry that signify a potential need or opportunity for your product or service. These can be organizational changes, financial events, expansions, new product launches, etc. Triggers are used to identify the right timing to approach a potential lead. For example, a company receiving funding might be in a position to invest in new solutions.

Data cleansing and filtering is the process involved in improving the quality of data by correcting inaccuracies, removing duplicates, and addressing incomplete or irrelevant data. Effective data cleansing ensures that the data used in sourcing and lead generation is accurate and reliable, thereby increasing the efficiency of the sales process.

Enrichment involves enhancing, filtering, refining, or improving raw data. This often involves appending additional information to existing leads' profiles, like industry, company size, technology use, etc. Enriched data helps in better segmentation, personalization, and qualification of leads.

Here is an example:

1. **Sourcing accounts (company-level data):** startupticker.ch RSS feed data shows that a funding round occurred in Company X (trigger and source).
2. **Cleansing and filtering accounts:** ChatGPT reviews accounts and ensures (1) the company is an ICP match; (2) the funding round really occurred.
3. **Enriching lead data:** Using LinkedIn data, the company CEO is found and enriched with a valid email address and phone number.

Again, start with your ideal messaging, then assess the available data's quality and enrichment possibilities. Based on this, adapt your messaging.

Sourcing

Scraping

In this section, we will go over some scraping tools that will help you to save time and automate your sourcing process.



Warning: some sites such as Crunchbase or LinkedIn have anti-scraping technology and it's against their terms and conditions to scrape data.

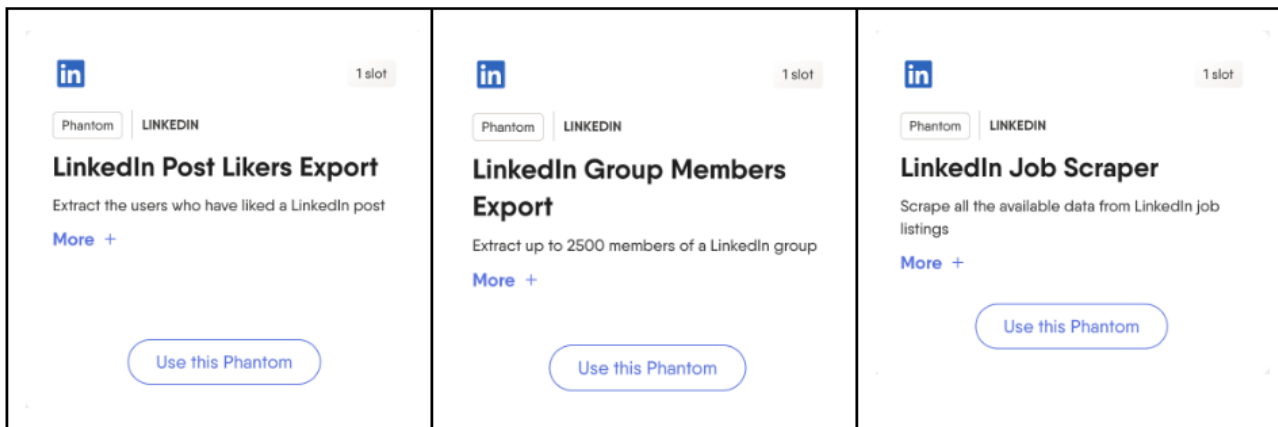
Recently one of our clients crawled hundreds of contacts on LinkedIn. The next day the account was banned. Yes, I cold outreach there, and there is some gray zone. However, if you so blatantly go against the terms and conditions of LinkedIn, be aware of the consequences.

Here are some of the tools I like and use:

PhantomBuster: Phantoms are a set of predefined scrapers for specific data sets. With PhantomBuster, you can automate these scrapers to repeat at set intervals. For example, using the “LinkedIn Job Scraper” on a seven-day repeat cycle automatically updates new job listings. Now, if you are building B2B cold outbound engines like SalesPlaybook, which help or replace SDRs or make them much more efficient, you can scrape LinkedIn for BDR/SDR job postings in your area and engage with those companies. These job postings act as triggers for engagement.

Below are some examples of PhantomBuster scraping possibilities:

 1 slot Phantom EMAIL Data Scraping Crawler Extract email addresses, phone numbers, and social media information from any site on the web More + Use this Phantom	 1 slot Phantom GOOGLE Chrome Extension Review Extractor Extract the reviews for an extension from the Chrome Web Store More + Use this Phantom	 1 slot Phantom GITHUB GitHub Contributors Export Extract the top 100 contributors of a GitHub repository More + Use this Phantom
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Source: phantombuster.com

Scrapestorm.com is an easy-to-use AI-powered visual web scraping tool.

The screenshot shows the Scrapestorm.com interface with a list of SaaS companies. The interface includes a top navigation bar with various filters and a main table of results. The table has columns for Name, Location, Description, Official Website, Industry, and Location. The data is organized into a grid with dashed lines separating the rows and columns.

Name	Location	Description	Official Website	Industry	Location
Twilio	Germany	Twilio is a cloud communications platform for building SMS, voice, and messaging applications on an API	twilio.com	Technology	São Paulo, Bangalore, Sydney
Duolingo		Duolingo is a language-learning and crowdsourced text translation platform founded in 2011 by Luis von Ahn	duolingo.com	Educational Technology	Pittsburgh, Seattle, Beijing
Cloudera		Cloudera is a business enterprise founded by Christophe Bisciglia, Jeff Hammerbacher and Amy Awadallah	cloudera.com	Data lakehouse	Bellevue, Washington, Vancouver
data.ai		Data.ai, formerly known as App Annie, is a unified data and artificial intelligence (AI) company that	appannie.com/jp, appannie.com, data.ai/en	Analytics	London, Beijing, San Francisco
Elastic		Elastic is a software company that creates products for searching for information on the Internet. It was	elastic.co, elastic.co/de	Network security	Amsterdam, Beijing, Chicago
Interos		Interos is a Virginia-based company developing a logistics assurance platform designed for supply chain	interos.ai	Enterprise software	Virginia, Frankfurt, Gloucestershire

Source: [Scrapestorm.com](https://scrapestorm.com)

Claygent from clay.com: Allows you to scrape websites or LinkedIn but allows scraping very custom data using ChatGPT. If you have a question such as, “Is this company hiring?” “Does this company work remotely?” etc., Claygent can get you a lot of relevant data.

Apify.com: Is another tool to build scrapers. I’ve not yet tested it, but I’ve heard a lot of good things about it.

Upwork.com and fiverr.com: Sometimes you can't scrape the website at all or you get faulty results. The fallback strategy here is to get a contractor for a little money on upwork.com or fiverr.com who does it manually or is more experience than you in scraping data. For example, I recently reached out to two hundred professional service providers in Switzerland, and as part of the ideal message, I wanted to scrape all their case studies and testimonials from their website. It turns out that many case studies and testimonials are only displayed as an image, so there is no automated way to get the data from the image without reasonable effort. An ideal solution is to outsource to someone who does the job for little money.

Another method of sourcing is to get your data points from data providers.

Data Providers

In this chapter, we will run over some great data providers that you can source from to get as close as possible to our ideal messaging. Having insight about which data provider can give you data point x, in quality y, at cost x is key to judging how close you can get to the ideal messaging given your resources.

Also note that it's crucial to understand that no single data provider holds all information. It is for this exact reason that tools such as clay.com provide "waterfall enrichment." This means that the tool pings provider A, and if provider A does not return a result, it will ping provider B and so on until it has a valid data point.

Below is a non-comprehensive list of my go-to data providers. This should give you some insight about where to find what data:

Logo	Data Provider	What It Does
	Apollo apollo.io	Apollo does multiple things, (1) they have a huge amount of data, and (2) they have an email sequencer to engage with prospects. I typically use their 274.5M-person database to get contact data.
	BuiltWith builtwith.com	Great if you want to find the tech stack a company is using. BuiltWith pings the website of your prospects, and if their website indicates somewhere that they are using tool x, BuiltWith will share that with you. However, if you are looking for QuickBooks/Bexio, BuildWith cannot provide this, as it is not installed on the website. For this, PredictLeads may help you.

	Capterra capterra.com	Software review platform. Gives you good insights on product problems by reviewing negative reviews.
	Clay clay.com	Not a data provider per se, but you can pull a lot of the data providers mentioned here into Clay without needing a subscription with all of these data providers.
	Crunchbase crunchbase.com	Provides information including investment and funding information and individuals in leadership positions.
	LinkedIn/Sales Navigator linkedin.com	Allows a search for companies, individuals, and job posts on LinkedIn. E.g., if you want to find every SME in Germany that is hiring a content creator.
	GitHub github.com	Fantastic to find technical people. Can find user details, email from surname, repo summary etc. Good if you're targeting or recruiting technical people.
	Google	You can use clay.com to bulk search google.com for people, companies, etc.
	Google News	Really great for finding company news.
	Google Shopping	You get Google shopping results. Good for ecommerce brands.
	Harmonic harmonic.ai	Pretty exhaustive list of B2B SaaS companies and funding rounds. But quite expensive.



Pitchbook

Funding and startup data.



PredictLeads

Can help to find the tech stack, based on historical job descriptions. E.g., if you are hiring for an accountant and you want them to have knowledge about QuickBooks, you typically write that into your job description, which is then crawled by PredictLeads.



RSS Feeds

Not a data provider per se, but many industries' online news platforms have an RSS feed, for example, startupticker.ch or businessinsider.de/gruenderszene.



Screenshot
screenshotapi.net

They can get you programmatic screenshots of any website.

Source: Eric Nowoslawski (Adapted)

Bespoke Data Providers

Lastly, there are few data providers that can work closely with you and get much more data tailored to your specific needs. Let me give you an idea of what is possible



Case Study: Blueprintgtm.com

Blueprint is a bespoke data provider that pulls from over fifty databases but also runs bespoke scraping of data for your outreach.

Some data points they mention for companies includes the following:

- Who is revamping their HR benefits
- Who has 30+ Coming Soon locations
- Where a new revenue leader must redefine their ICP
- Who uses X tool/technology by department
- Who has case studies older than 1 year
- Who has a learning stipend >\$2k per employee
- Who has posted on LinkedIn about X topic
- Who has > 20 new Operations hires in the last 30 days
- Who has increasing Google reviews
- Who is not responding to their chatbots and how long does it take to respond.
- Technology by department, including seniority of jobs and number of people using the technology.
- Any other data on the public web

Detailed Technographics Data

We currently track 14,251 technographics. Contact us at jordan@blueprintgtm.com to get access to the full list of technographics and their categories.

Each Technographic object has the following fields:

- **name** (string): The name of the technographic.
- **name_lowercase** (string): The name of the technographic in lowercase.
- **category** (string) (case sensitive): The category of the technographic. The categories are:
 - **Website**: Products or services that are detected on the company website.
 - **Specialty**: Company specialties that are detected on the company LinkedIn page.
 - **Programming Language**: Programming languages that are detected in the company jobs description.
 - **Company**: Company names that are detected in the company jobs description.
 - **Technical Term**: Technical terms that are detected in the company jobs description.
 - **App**: Apps names that are detected in the company jobs description.
 - **Tool**: Technical tools that are detected in the company jobs description.
 - **Library**: Programming libraries that are detected in the company jobs description.
 - **Framework**: Programming frameworks that are detected in the company jobs description.
 - **Operating System**: Operating systems that are detected in the company jobs description.
 - **Plugin**: Web plugins that are detected in the company jobs description.
 - **Cloud**: Cloud providers and services that are detected in the company jobs description.
 - **Content Management**: Content management systems that are detected in the company jobs description.
 - **Project Management**: Project management systems that are detected in the company jobs description.
 - **Web3**: Web3 technologies that are detected in the company jobs description.
 - **AI**: Artificial intelligence technologies that are detected in the company jobs description.
 - **Advertising**: Advertising technologies that are detected in the company jobs description.
 - **Analytics**: Analytics technologies that are detected in the company jobs description.
 - **Sales**: Sales systems that are detected in the company jobs description.
 - **Marketing**: Marketing systems that are detected in the company jobs description.
 - **Social Media**: Social media products that are detected in the company jobs description.
 - **Accounting**: Accounting systems that are detected in the company jobs description.
 - **ECommerce**: ECommerce tools that are detected in the company jobs description.
 - **HR**: HR technologies that are detected in the company jobs description.
 - **Payment**: Payment technologies that are detected in the company jobs description.
 - **Booking**: Booking technologies that are detected in the company jobs description.
 - **Finance**: Finance technologies that are detected in the company jobs description.
 - **Healthcare**: Healthcare technologies that are detected in the company jobs description.
 - **Legal**: Legal technologies that are detected in the company jobs description.
 - **Communication**: Communication technologies that are detected in the company jobs description.
 - **IoT**: IoT technologies that are detected in the company jobs description.
 - **Music**: Music technologies that are detected in the company jobs description.
 - **Fashion**: Fashion technologies that are detected in the company jobs description.
 - **Design**: Design technologies that are detected in the company jobs description.
 - **Education**: Education technologies that are detected in the company jobs description.
 - **Travel**: Travel technologies that are detected in the company jobs description.
 - **Gaming**: Gaming technologies that are detected in the company jobs description.
 - **Marketplace**: Marketplace technologies that are detected in the company jobs description.
 - **Entertainment**: Entertainment technologies that are detected in the company jobs description.
 - **Real Estate**: Real estate technologies that are detected in the company jobs description.
 - **Food**: Food technologies that are detected in the company jobs description.
 - **Infrastructure**: Infrastructure technologies that are detected in the company jobs description.
 - **Media**: Media technologies that are detected in the company jobs description.
 - **Logistics**: Logistics technologies that are detected in the company jobs description.
 - **Automotive**: Automotive technologies that are detected in the company jobs description.
 - **Agriculture**: Agriculture technologies that are detected in the company jobs description.
 - **Environment**: Environment technologies that are detected in the company jobs description.
 - **Insurance**: Insurance technologies that are detected in the company jobs description.
 - **Government**: Government technologies that are detected in the company jobs description.
- **first_detected_at** (string): The first time the technographic was detected.
- **last_detected_at** (string): The last time the technographic was detected.
- **senior_jobs_detected_times** (int): The number of times the technographic was detected in senior jobs.
- **entry_jobs_detected_times** (int): The number of times the technographic was detected in entry jobs.
- **number_of_detected_times** (int): The total number of times the technographic was detected.
- **number_of_jobs_found_in** (int): The number of jobs the technographic was found in.

Source: Jordan Crawford blueprintgtm.com

You should now understand what data is available. Again, do not (only) leverage that data for personalization, but primarily for problem sniffing and targeting your outreach. Keep in mind, relevancy is ten times better than personalization.

Before we move on with triggers and filters. I'd like to give you a step-by-step walkthrough on how to source data on LinkedIn Sales Navigator.

LinkedIn Sales Navigator in Practice

LinkedIn, with over one billion members, is the most important database of prospects. That's why we dive a bit deeper here with a step-by-step guide on how to source relevant contacts with SalesNav.

Note! Even though you often don't find a business email on LinkedIn Sales Navigator, it's still a great tool for searching for prospects and enriching emails or mobile phone numbers in a second step.



In an ideal world you build an account list for one thousand accounts and then make twenty lead lists of fifty contacts. However, it will never be as simple as this, because you have to find a common element that connects all fifty contacts inside the lead list. Finding the common element will allow you to make your message seem personal.

The simple algorithm:

1. Select an ICP account (company).
2. Find one thousand similar companies in Sales Navigator
 - A. Create lead lists of up to fifty leads from this account list by finding commonalities.
 - B. Each single lead list will be a single campaign that you will target with a specific message.
 - C. Import this list into your LinkedIn Outreach automation tool.
 - D. Iterate.
3. Expand your account list.

In the ideal example mentioned above, you would have fifty contacts (leads) every week for twenty weeks. Beware, you will not always have one thousand similar accounts, and you will not find commonalities that easily segment into twenty equal groups. Below we will tackle this problem and what you should do if you face it. Also bear in mind that LinkedIn is a lot about trial and error. You will start with a hypothesis.

Account List

When using Sales Navigator Advanced, the best feature is that you can upload a list of your ICP accounts (provided by the client), and Sales Navigator will return you a list with similar companies.

Upload account list

Requirements Upload CSV Map fields Name list

1 Save your file as a CSV (max file size of 10MB)
Make sure your accounts are in CSV (comma-separated values) format and do not exceed 1,000 line items.

2 Include columns containing account name and other attributes
Additional fields help us process and match your accounts with higher accuracy

Required Account Name

Optional LinkedIn Company ID LinkedIn Company URL Website URL Country City
Street Stock Symbol

Continue

There is a workaround if you do not want to purchase the advanced license:

1. Start with creating an account list.
2. Take a primary company that represents the ICP of your client.
3. Search it in LinkedIn Sales Navigator.

Lead Account Collapse

Search: trainual Saved searches

Trainual (0 filters) Save search to get notified of new results

Company attributes

Annual revenue +

Company headcount -

11-50 0

51-200 2

201-500 0 Company headcount

501-1,000 0

1,001-5,000 0

Company headcount growth +

Headquarters location +

+ United States (10)

Industry +

Spotlights

Job opportunities +

Recent activities +

Connection New +

Workflow

Companies in CRM +

To enable filter, upgrade contract

Saved accounts +

Account lists New +

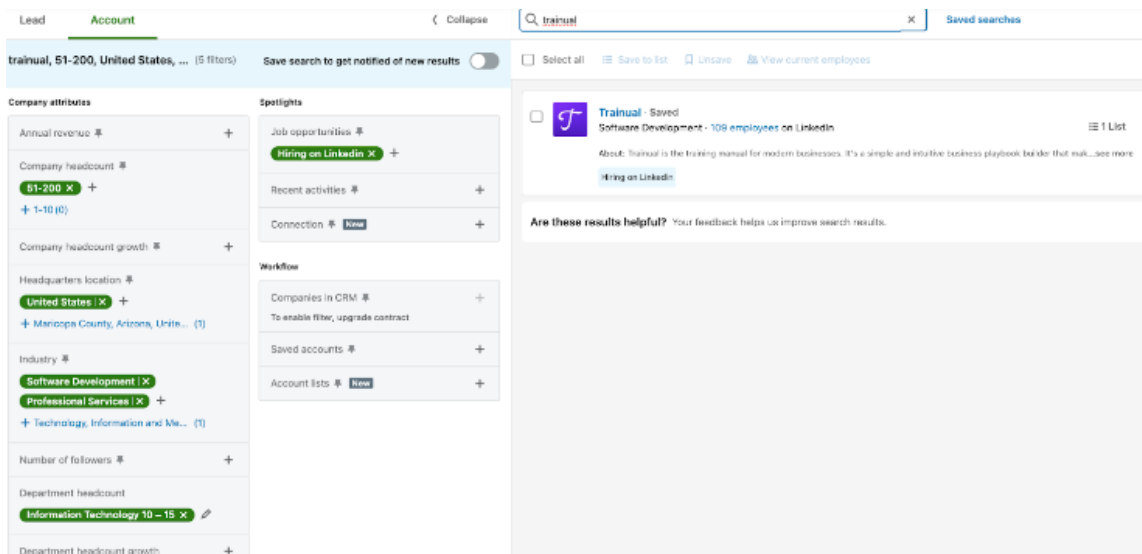
Trainual - Saved
Software Development · 109 employees on LinkedIn
About: Trainual is the training manual for modern businesses. It's ...see more
Hiring on LinkedIn

Trainual
IT Services and IT Consulting · 0 employees on LinkedIn

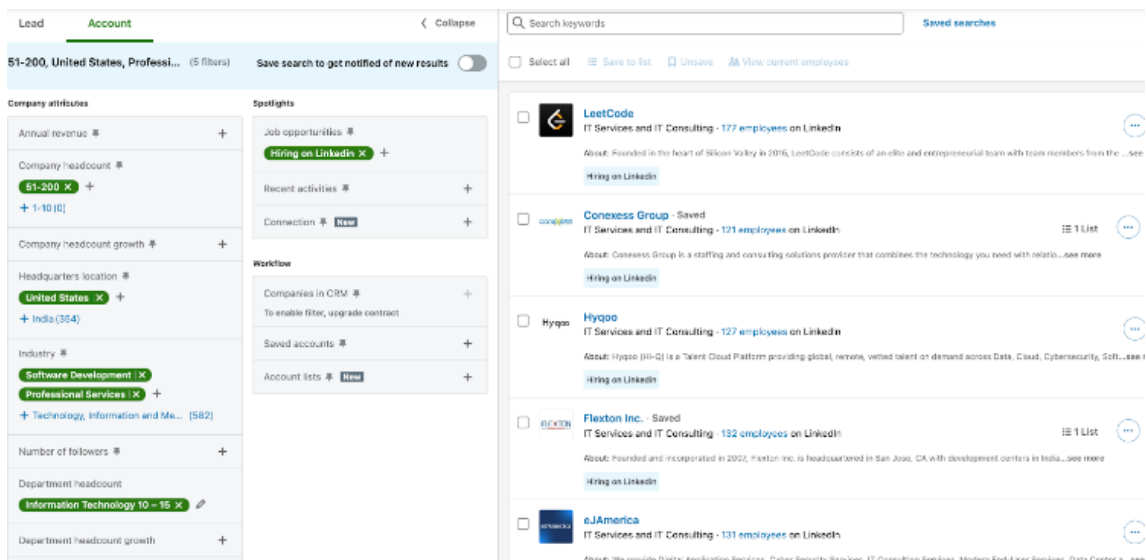
Krahyar | Trainual Certified Consultant
Business Consulting and Services · 0 employees on LinkedIn

LYNXUS Solutions
Outsourcing and Offshoring Consulting · 122 employees on LinkedIn
About: LYNXUS is a fast-growing valued partner for businesses that require mission...

4. Open a second Sales Navigator tab and copy the same filters as for the ICP.
5. You now have a list of similar companies.



6. Save the search.
7. Add all companies to the account list. Yes, you will have to add them manually page by page.



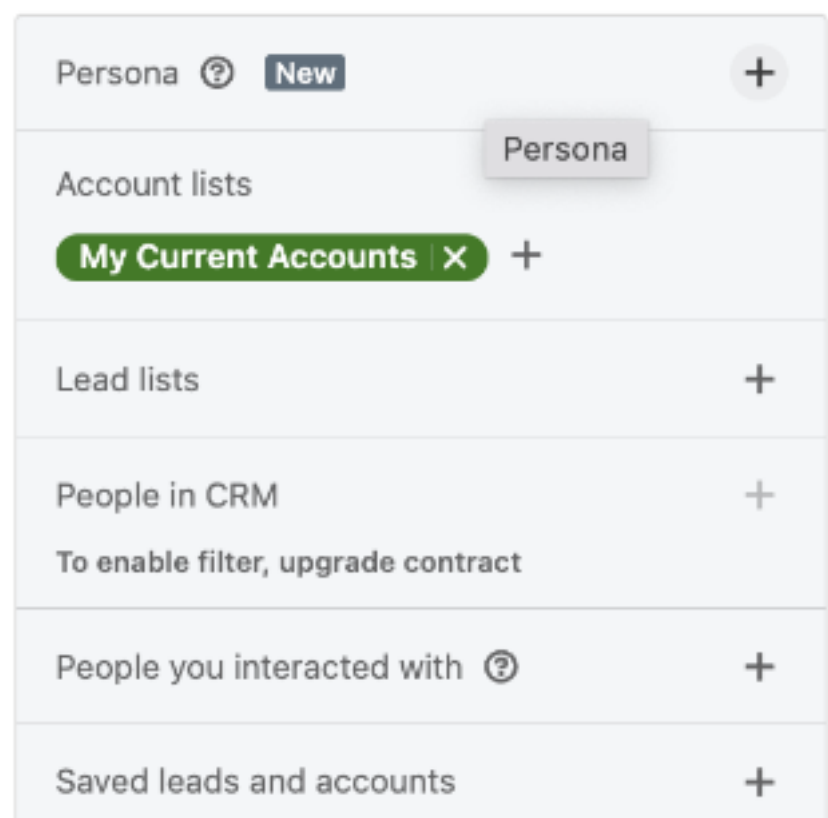
8. Ideally you will have a list of nearly one thousand accounts.

Now you can move on to the lead list.

Lead List

1. Open the Lead Filters.
2. Go to Workflow and add the account list you created.

Workflow



3. Now you can start looking for the contacts with the right filters inside of these accounts.

The right filters depend on the strategy/campaign you will implement. We will talk about that in the next section, but first, let's learn the basics of proper LinkedIn searches.

Basic Search and Sales Navigator Mastery

Search Syntax

Boolean Search Syntax	
- Quoted searches: Use quotation marks for an exact phrase, like “product owner.” - NOT searches: Exclude terms by adding NOT before a search term. For instance, “programmer NOT manager.” - OR Searches: Try “sales OR marketing OR advertising.” - AND Searches: Head AND Sales AND Marketing. You will get: “Head of Sales and Marketing.” or “Head of Sales, Marketing, Partnerships” - Parenthetical Searches: Combine terms with parentheses. E.g., VP NOT (assistant OR SVP). . :‘+’ and ‘-’ operators aren’t officially supported. Instead, use “AND” and “NOT” for clarity. - Type NOT, AND, or OR in uppercase. - No wildcard ‘*’ searches.	

Rookie Mistakes

Mistake	Description	Suggestion
Rookie Mistake #1: Function Filter	The function filter should be avoided in general since some users interpret it for their own function and others for their company’s function. A sales rep working for a software developer can therefore result in different function outputs.	DO NOT use this filter.
Rookie Mistake #2: Job Title Filter	Using the job title filter blindly without using exact search.	Use exact search—see segment above “quoted searches.”

Mistake	Description	Suggestion
Rookie Mistake #3: Keyword Filter	Trusting it blindly and not double-checking. The keyword is any word that appears in the HTML code on the contact's profile page.	
Rookie Mistake #4: Seniority Level Filter	The seniority is attached to all the contact's companies. So one can be seniority entry-level and CXO at the same time. The suggestion is to not use this filter at all and instead opt for "years in current company."	
Rookie Mistake #5: Industry Filter	The same reason as for the function filter.	
Rookie Mistake #6: Assuming filters apply independently	Contacts can be members of multiple companies and therefore have multiple functionalities/industries etc. applied to them.	

Strategies for Lists

Here is where you have to get creative.

Contacts that just arrived in new company

Use years in current company ≤ 1 year.

Additionally add job title.

Finding commonalities

General approach = fixed filter + keyword

Example: Past Company + Keyword

The screenshot displays a LinkedIn search interface. At the top, there's a search bar with the keyword "blockchain". Below the search bar, the search results are filtered by "blockchain, Microsoft, Chief Executive Officer" (3 filters). The interface is divided into two main sections: filters on the left and search results on the right.

Filters:

- Company:** Current company (HERE Technologies), Company headcount, Past company (Microsoft), Company type, Company headquarters location.
- Role:** Function (Program and Project Management (4)), Current job title (Chief Executive Officer), Seniority level (Entry Level), Past job title.
- Buyer intent:** Following your company (0), Viewed your profile recently (0).
- Best path in:** Connection, Connections of, Past colleague (0), Shared experiences (1).
- Recent updates:** Changed jobs (0), Posted on LinkedIn (7), Mentioned in news (0).
- Workflow:** Persona (New).

Search Results:

- Hans Dahn** - 2nd Entrepreneur - PwC Belgium. Berlin, Berlin, Germany. 1 year 3 months in role | 1 year 3 months in company. About: Leader with more than 35 years of experience in Enterprise Leadership and... Experience: 2011 - 2016 (5 yrs 10 mos) - Microsoft - Director Application Platform. 6 mutual connections.
- Dr. Tina Ruseva** - 2nd Founder & CEO - Mentessa. Munich, Bavaria, Germany. 4 years 9 months in role | 4 years 9 months in company. About: Work is not about ticking boxes or climbing the career ladder. The true purp... Experience: 2007 - 2008 (1 yr) - Microsoft - Business Support Engineer. 27 mutual connections. 2 recent posts on LinkedIn.
- Lee A Burton BSc MBCS** - 2nd CEO / Full-Stack Web Developer - SmokinMedia.com. Greater Munich Metropolitan Area. 13 years 4 months in role | 13 years 4 months in company. About: CEO and Full-Stack Web Developer with 25+ years of experience. A demons... Experience: 2010 - 2013 (3 yrs 8 mos) - Microsoft / Ciao GmbH - Usability Tester. 1 mutual connection.
- Christian Klasen** - 2nd Founder and CEO - technidoo solutions. Aschaffenburg, Bavaria, Germany. 8 years 7 months in role | 8 years 7 months in company.

Wild Cards

The following are considered wild cards because they are not attached to account lists and only work on Basic Search.

Source: thesalesplaybook.com, Diego Sosa

Service Category

All filters

Filter only People by

☐ business Consulting and Services

☐ Add an industry

Profile language

☐ English

☐ German

☐ French

☐ Spanish

☐ Portuguese

Open to

☐ Pro bono consulting and volunteering

☐ Joining a nonprofit board

Service categories

☐ Consulting

☐ Coaching & Mentoring

☐ Marketing

☐ Operations

☒ Business Consulting

Keywords

First name

Last name

Title

Company

Get familiar with all service categories. You can find an overview of all categories here.
To be continued.

Events

Search for current events potential leads could be attending. Use the search bar in LinkedIn Basic Search and type the relevant keyword—for example, “blockchain.” Press “Enter” and then select the tab “Events.”

in

blockchain

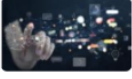
HomeMy NetworkJobsMessagingNotificat

Events

549 results



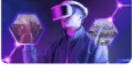
Monthly roundup: Metaverse, Web3, Blockchain, Crypto and NFTs
Sat, Dec 2, 1:30 PM CEST
Online • By Arpit Apoorva
This week in Web3 is a weekly LinkedIn Audio series to discuss the latest in **Blockchain**, Metaverse, Crypto, NFTs, and all things Web3. Web3 is already impacting marketers, such...
5,011 attendees



Business in Metaverse
Sat, Dec 2, 4:30 PM CEST
Online • By Arpit Apoorva
The metaverse opens up new opportunities for people to connect in new ways as a result of the rise of digital commerce. And consumer behavior will be reflected in the business...
7,429 attendees



An intro to Web 3.0 and why should you give a damn?
Sat, Dec 2, 2:30 PM CEST
Online • By Arpit Apoorva
Web 1.0 existed from 1991 to 2004. Web 2.0 came soon afterward and is the version of the internet we all know and use today. Web 3.0 enabled by **blockchain** changes how w...
3,154 attendees



Money in Metaverse: The role of Blockchain, Web3, Crypto and NFT
Sun, Dec 3, 1:30 PM CEST
Audio • By Arpit Apoorva
Even though the widespread adoption of the metaverse and the creation of sizable revenue streams in the financial services industry might take some time, many businesses might...
3,141 attendees



Navigating Blockchain Evolution: Akkodis' Global Adoption Partnerships
Tue, Dec 5, 4:00 PM CEST
Online • By Akkodis
As part of our Thinkers & Makers Series, join us on December 5 for our Live session on Distributed Ledger Technology (DLT) and Blockchain. Discover what initiatives our experts...
97 attendees

Now do some research and select the most appropriate event. This will depend on the geography, the number of attendees, the relevance for your use case, and the date of the event. Ideally an event is only one week away, so you can start connecting before the event.

Simple Algorithm

1. Select the event.
2. Click Attend Event.
 - A. Browse attendees to see if there are potential clients.
 - B. If not, select a different event and start again.
3. Copy the URL.
4. Import it into Expandi.
5. Set up a new campaign with a unique message.

Source: *thesalesplaybook.com, Diego Sosa*

Triggers and Filters

Triggers and filters can be used to infer a current, relevant problem of your prospect. Sometimes you can also use triggers to further filter your list.

Below, you find a large list of potential triggers and filters that shall serve you as an inspiration for what is possible.

- | | |
|---|---|
| <ul style="list-style-type: none">• Awards/recognition• Bad and good product feature review feedback• Change in management strategy/restructuring/reorganization• Change in marketing agency• Change in marketing channel• Change in web traffic• Change in executive leadership• Collaboration and partnership• Company facing piracy issues• Competitor launched a new product• Cost-reduction measures | <ul style="list-style-type: none">• Major customer announcements• Major industry development• Mergers and acquisitions (MANDA)• Mission and vision• Negative press coverage/scandals and fraudulent activities• New job/position for a current contact• New legislation• New product/service launch or announcement• New technology trend• New tool adoption• New website/major website changes |
|---|---|

- DMARC set versus not set
- Debt offerings/restructuring
- Declaration of dividends
- Delisting
- Dissatisfaction with current vendor
- Donations and sponsorships
- ESG initiatives
- Event announcements/participation
- Expansion/relocation/entrance into new markets
- Financial distress
- Financial results/earnings report
- Fundraising efforts/funding round
- Good quarter
- Hiring for role x
- Identify specific problem importance
- Increase in business expenses
- Increase in hiring velocity
- Increase in negative employee reviews
- Increase in positive employee reviews
- Increase in positive or negative customer reviews
- Increase in software expenses
- Increase/decrease in customer base
- Increase/decrease in sales
- Increase/decrease in the marketing budget
- Industrial accidents and disasters
- Initial public offering (IPO)
- Innovation and research endeavors
- Investment activities
- Joint ventures
- Legal disputes, judgments, and settlements

- Number of employees doing job x at company y
- Opening of branches/stores
- Pilot programs and trials
- Positive press coverage
- Pricing adjustments
- Privatization
- Product discontinuation or recalls
- QANDA threads related to your content
- Rebranding and renaming
- Regulatory approvals
- Regulatory investigations
- Regulatory restrictions and enforcement
- Research findings and publications
- Resolutions of regulatory matters
- Sales promotions
- Security breaches and vulnerabilities
- Selling assets/cutting losses
- Service interruptions
- Service suspensions and shutdowns
- Shareholder voting activities
- Shift in sales channel (inbound vs. outbound)
- Speculations and rumors
- Spin-offs
- Supply chain interruptions
- Tool usage
- Website security issues/prospect's website gets hacked
- Workforce reductions and downsizing
- Workplace disputes and strikes

Let's see how Growth Engine X is using triggers to significantly filter their list for relevancy.



Growth Engine X builds, tests, and automates companies' cold email outbound processes. For them, an interesting ICP is funded B2B SaaS founders who do not yet have a head of sales and have little cold email outbound experience.

Finding the B2B SaaS founders is relatively easy by using, e.g., Apollo, LinkedIn, or Harmonic.

The question is how to deal with the no head of sales and little cold email outbound experience.

Head of sales: You can do this relatively easily by pulling the list into clay.com and then enriching it for LinkedIn company profiles and checking it against head of sales, VP of sales, and similar roles. If you can't find one, there is a high probability that they don't exist.

Little cold email experience: For this case, you can use the DMARC record in the company's DNS as a proxy. A DMARC is an email authentication protocol that helps you maintain high deliverability of your emails. The hypothesis is that the founder of sales has little cold email experience if the DMARC record is not set correctly.

So how can you check this programmatically?

You can use clay.com, where you will find an enrichment called BuiltWith with okayish accuracy. Or head off to <https://easydmarc.com/tools/domain-scanner> if your list is not too large and check each domain manually.

Data Filtering and Cleansing

This is a relatively short section but an important one. It's vital that you clean your data well. This also means removing any contacts that are not ICPs.

Why is that so important? **(A)** You don't want to burn time and resources contacting the wrong leads, and **(b)** if you are sending emails to prospects with the wrong messaging, you are more likely to get labeled as spam. See the email requirements from Google below:

New requirements for bulk senders

By February 2024, Gmail will start to require that bulk senders:

- 1. Authenticate their email:** You shouldn't need to worry about the intricacies of email security standards, but you should be able to confidently rely on an email's source. So we're requiring those who send significant volumes to strongly authenticate their emails following well-established [best practices](#). Ultimately, this will close loopholes exploited by attackers that threaten everyone who uses email.
- 2. Enable easy unsubscription:** You shouldn't have to jump through hoops to stop receiving unwanted messages from a particular email sender. It should take one click. So we're requiring that large senders give Gmail recipients the ability to unsubscribe from commercial email in one click, and that they process unsubscription requests within two days. We've built these requirements on open standards so that once senders implement them, everyone who uses email benefits.
- 3. Ensure they're sending wanted email:** Nobody likes spam, and Gmail already includes [many tools](#) that keep unwanted messages out of your inbox. To add yet another protection, moving forward, we'll enforce a clear spam rate threshold that senders must stay under to ensure Gmail recipients aren't bombarded with unwanted messages. This is an industry first, and as a result, you should see even less spam in your inbox.

Source: *Google Blog*

Validate for ICP Fit

AI is really strong in understanding at scale. Using GPT-4 to validate that thousands of contacts are an ICP fit or not takes a few minutes for the AI. Obviously, there are some running costs associated with it, but it's often much cheaper than having an SDR team spending days on the task. Here is a how-to guide for a simplified example for the ICP B2B SaaS startups:



How-to Guide

I'd use a tool called clay.com (more on Clay later) that integrates with our OpenAI account and tell ChatGPT to visit all the relevance domains.

🚩 ICP Match Check [✎](#) [✕](#)

Claygent (AI Web Scraper): I can search the web, visit websites, and gather information for you!

CHOOSE OPENAI API KEY ACCOUNT

☐ Use Clay's OpenAI API Key 1 💰

☒ Use my own OpenAI API Key Free

miltos@thesalesplaybook.io's OpenAI API Key ▼

SETUP INPUTS

Start with an integration template (optional)

[+ Browse Templates](#) [Save current config](#)

Mission

visit [🔗 f 🔗](#) Domain (1) ✕ and figure out if the company is a B2B SaaS or B2B Software Company. If it is any of the above then return "yes" if not then return "no".

Source: clay.com

The output we received is the following. It's quite impressive how accurate GPT-4 is, even giving a confidence level, which really helps you manually review some of the cases. This is one output of potentially thousands, and the costs associated with it are marginal at 0.0032 USD. Any SDR is more expensive.

 **Cell Details** 

T Result yes

T Reasoning Tune Insight offers solutions related to encrypted computing, collective analytics, machine learning, and AI, which indicates that they are a B2B SaaS company focused on data collaboration and valorization solutions. Additionally, the company's contact information and address is provided on the webpage.

Confidence 95

> Steps Taken [1]

Total Tokens Used 2825

T Total Cost To Open AI \$0.0032300000000000002

T Time Taken In Seconds 13.41

☐ **Forced To Finish Early Because Of Cost** false

Source: *clay.com*

Blacklist and DNC Process



Attention: Learn from my mistakes.

When I started back in 2021 my first cold outreach on LinkedIn, I've contacted around 1000 SaaS Account Executives as an addition to our team. The message was along the lines of:

Hey Fabian,

I just discovered your profile here, and that's exactly the kind of person we're looking for here to build up Germany. I think your experience in B2B sales and SaaS could really help us. Would you like to talk about it?

VG - Florian

I've booked thirty-plus meetings and hired a great AE out of this campaign.



Now, this all sounds great, but there is a little twist to the story. At some point toward the end of the campaign, my boss called me. "Hey, Florian, client x just called me and was asking why we are trying to poach their AEs." Oops. After that, we blacklisted them.

Blacklist: In B2B cold outreach, a blacklist is a list of domains, email addresses, or phone numbers that you want to avoid sending communications. Who do you potentially put on the blacklist?

- **Existing customers:** See the example above. You typically don't want to contact your existing customers with cold outreach.
- **Previously contacted prospects:** You don't want to launch a cold outreach campaign four weeks after you launched the last cold outreach campaign for the exact same prospects. Typically, wait six to twelve months before you approach them with a different angle.
- **Opt-out prospects:** A set of prospects that have specifically requested that they no longer want to be contacted by you. If you are reaching out to them by email, they are much more likely to mark you as spam, which will harm your email deliverability.
- **Domains:** Often, you don't want to reach out to private email addresses. For example, email addresses with @gmail.com and @hotmail.com etc. indicate that these are private email addresses, not company email addresses.

It's important to know that a blacklist is not static; it's a dynamic list for which you need a process and/or automation in place. I refer to this as the Do Not Contact (DNC) Process. It must ensure the following:

- **Accountability:** Someone is accountable to maintain it.
- **New customers:** Are added to the blacklist
- **New prospects:** Are added to the blacklist, including a last-contacted date.
- **Automations/synchronization:** Are in place to ensure the blacklists are fully up-to-date. A blacklist should live in your single source of truth (typically a proper CRM such as HubSpot).

Unique identifier: Once you've sourced your list, you need to sync it against your blacklist. For this you need a unique identifier such as an email or first and last name. With first and last name, you often have to do some manual work, as you will find some duplicates. If you source your list without emails, you must enrich your list with emails. We will cover this in the next section.

Other Cleansing Tasks

- **Deduplication:** Review your data for any duplicates.
- **Correcting typographical errors:** Sometimes when you source your list you get weird conversions of “ü/ä/ö” or something cryptic. Ensure you fix this.
- **Invalid emails: IMPORTANT:** If you sourced your emails, make sure you remove invalid emails. Deactivated emails decrease your sending reputation massively. Around 30% of emails go bad in just one year. You can use a bulk email verification tool to eliminate any bad emails, such as DeBounce or ZeroBounce.



ZeroBounce | Email validation tool



DeBounce | Email validation tool

Congratulations, you should have a clean list that you can start enriching.

Enriching

You've sourced and cleansed the data. But depending on your data source, you are often still missing some data points or want to further enrich the data with AI.

Contact Data Enrichment

Do you have your list but are missing email or phone number data? Below are some data providers which help you to enrich emails or phone numbers.

Note: It goes without saying that you also want to use some of the data providers in the chapter “Sourcing” to enrich your data.

Logo



Data Provider

Clay
clay.com

What It Does

Linked to several contact data providers. Meaning, you can enrich a lot of contact data with clay.com without having to buy a subscription for other data providers. Some data providers, e.g., Prospeo, provide you with an API key to connect it with Clay, which can decrease your enrichment costs significantly

Logo	Data Provider	What It Does
	Cognism cognism.com	GDPR compliant: mobile phone numbers and B2B emails data. Pricy but hear a lot of great feedback.
	ContactOut contactout.com	Promises contact data beyond just LinkedIn.
	Datagma datagma.com	Work email and mobile numbers but relatively expensive.
	DropContact	Finds working email.
	LinkedIn/LinkedIn SalesNav LinkedIn.com	Finds LinkedIn profiles. Can use clay.com to do this in bulk.
	Prospeo prospeo.io	Email enrichment tool SalesPlaybook uses currently.
	Signal Hire signalhire.co	Emails and phone numbers.

AI Enrichments

With ChatGPT, the possibilities of smart enrichment are almost unlimited. I've recently stumbled across this post from Eric Nowoslawski, which lists some of the possibilities available:

- Does this company have diversity hiring initiatives?
- Does this company work remotely?
- How many offices does this company have?
- Who is the hiring manager in New York for the finance team?
- Who is a company's competitor?
- Has this company completed any mergers and acquisitions?
- Does this company have videos on their site?
- Who are the investors of the company?
- What products does this company sell?
- Who is the owner of this local business?
- What was the most recent blog post?
- Does this company mention CSV uploads on their website?
- Is this company hiring?
- When was the last time this company raised money?

So how does it work?



Practice Guide

Let's use clay.com for a simple example.

Let's imagine you are a professional service provider for case studies like

<https://casestudybuddy.com/>.

You want to reach out to companies that do not have case studies or testimonials or have some case studies on their website, but you are convinced that you can craft much better ones.

Go to clay.com and use their Claygent (AI Webscraper) and use a prompt such as the following:

Mission

Visit ☒ Domain ☐ and provide the top 3 case studies or testimonials.

Output format:

If you find case studies, provide them in a comma-separated

Type / to Insert Column

Hint: Break your task down. Be as specific as possible and describe the steps you would take to complete this task and explicitly tell it what to return.

Source: *clay.com*

Here is the output you receive. Doing this for twenty to thirty companies is easily done manually. However, once you want to go through thousands of prospects, it will quickly get time intensive.

Result	#	Confidence (%)
Somandin - Mit der Natur verbunden, K...		95
SWISSCURLING Association, Lidl Schw...		100
Umantis, Nahrin, Shopping Arena		100
ZRH Insider, SCHURTER Smart Connect...		100
no		100
no		95
SBB: Projektkommunikation für die Kon...		100
SAP NOW Zurich, SBB Osteraktion, BRA...		100
Allianz Schweizer Wirtschaft für das Kli...		100
Galli, Marc Sway, MDM Watches		100

Source: *clay.com*

Important, when you are using AI at scale you should always test at a small subset; otherwise, you can burn quickly through a lot of credits.

In order to get a great AI enrichment results, you need to know some basics of prompt engineering.

Prompt Engineering

When it comes to prompt engineering, a little knowledge can make a big difference in the results you get. Below are the basics that the folk from clay.com put together. However, even with some knowledge a bit of trial and error is often required.

Use AI for the following:

- + Creative and personalized copy
- + Understanding at scale, e.g., lead scoring
- + Cleaning unstructured datasets that are messy or variable in format

Do NOT use AI for the following:

- Things that can be better accomplished by web scrapers
- Static information like job titles or company location
- Writing entire emails
- Use AI to write some sentences and keep other sentences static.

Basic Prompt Engineering

Your prompts should be simply phrased and highly specific. Imagine you're explaining what you want to a super-smart fifth grader who lacks context. You can use the following framework to write up a solid prompt:

- **Summarize the general goal:**
 - E.g., Tell me what this company does, based on the "company description" input.
 - E.g., Using the input, create a sentence summarizing this company's mission. (If you have multiple inputs, say something like: "I'm going to give you multiple inputs. Using them, write a summary of X.")
- **Provide the core data:**
 - E.g., Here is the "company description" input: [insert input].
 - E.g., This is the input(s): _____. If any inputs are empty, ignore them.
- **Constrain creativity:**
 - E.g., Write a one-sentence summary in under 10 words.
 - E.g., Keep the output <15 words, keep your tone casual, talk as if you were an acquaintance, use specific keywords, etc.
- **Specify what the message should look like:**
 - E.g., Start each summary with the prefix, "I noticed that your company".
 - E.g., Everything should start with this prefix: "____." Or the output should look like this: _____.

Some instructive prompts:



Prompt: Summarize LinkedIn Post

Using the input, complete a sentence summarizing what someone's last LinkedIn post was about. This is the input: [Insert Post].

Keep the output under 12 words and use specific keywords from the input. Complete each output with my prefix and do not include quotations or hashtags (#) in the output.

This is my prefix: "I saw your recent LinkedIn post about".

Prompt: Infer Company Needs from Open Jobs

Using the input, infer why a company is hiring for the role. The input that I will give you is the company description and the job title they are hiring for.

This is the company description input: "{{Company Description}}". This is the job title input: "{{Job Title}}".

Take your time to think about what the mission of the company is and how hiring this role would help them accomplish their mission. When completing the output, generate text about how hiring this role would solve a problem.

Complete the output with my prefix. This is my prefix: "I saw you on your website that you are hiring for a {{Job Role}}. In my experience, companies hire for this role to".

Advanced Prompt Engineering

For use cases such as the following, simple prompts sometimes don't do the job, and you have to engineer more sophisticated prompts:

- Data cleaning;
- Brainstorming creative marketing ideas; and
- Generating long-form copywriting that requires large amounts of context

Here are two examples of more sophisticated prompts:



Prompt: Generative, Creative Custom AI Use Cases

In this case, we use AI to generate creative ideas for how a company could start using AI in their business in order to sell an agency's services.

Using the input, create three bullet points of creative ideas for a company to start using AI in their processes. The ideas have to be possible with artificial intelligence.

This is the input: "{{Description}}"

Take your time and think about what the company does, who they help, and what operations in their business could be streamlined with AI. Be specific and give unique advice.

Keep each bullet under 15 words and give suggestions on how the business can leverage AI.

To train the AI, we gave the AI three pairs of inputs and outputs:

Training Pair #1 - Apollo.io

Input

Using the input, create three bullet points of creative ideas for a company to start using AI in their processes. The ideas have to be possible with artificial intelligence.

This is the input: "Apollo.io combines a buyer database of over 250M contacts, powerful sales engagement, and automation tools in one easy-to-use platform. Trusted by over 160,000 companies, including Autodesk, Rippling, Deel, Jasper.ai, Divvy, and Heap, Apollo has more than one million users globally. By helping sales professionals find their ideal buyers and intelligently automate outreach, Apollo helps go-to-market teams sell anything."

Take your time and think about what the company does, who they help, and what operations in their business could be streamlined with AI. Be specific and give unique advice. Keep each bullet under 15 words and give suggestions on how the business can leverage AI.

Output

- Train AI to onboard new staff members to learn the ins and outs of outbound prospecting faster.
- Use AI to help customers come up with copywriting they can use inside of Apollo to get better response rates.
- Use AI to predict which deals are going to close and when and then teach your customers how you did it.

Prompt: Cleaning LinkedIn Job Titles

When you scrape LinkedIn titles, people often put extra information in the titles that makes it pretty clear that the title was scraped and used as a custom variable. We can clean them using AI in just three steps.

Clean these job titles of extra information. Oftentimes, people put extra information that is unnecessary in their job titles. Remove this information and simplify the job titles. Here are the titles I want you to clean:

- CEO || World Changer Founder YC 22
- CRO/Chief Strategy Officer
- Chief Operating Officer and Chief of Staff
- Human Resources Director
- Engineering, Director
- Account Executive - Enterprise Sales - APAC

Output:

- CEO
- Founder
- CRO
- Chief Operating Officer
- Director of Human Resources
- Director of Engineering
- Account Executive

By now, you should have a pretty good idea on how to engineer prompts. If you need more examples, check out the clay.com/aiguide. Lastly, let's review how to do copywriting for cold outreach with AI.

Cold Outreach Copywriting

A common mistake is letting the AI generate a full email instead of breaking it down into two steps, as follows:

1. Generate or write an outreach message.
2. Then use AI to customize some parts of your message.

For example:

Static email with custom variables

{{first_name}} – {{Line 1 Email 1}} {{Last post number of days}}

AI generated first line

If you're trying to build your brand on LinkedIn, have you considered using a scheduling tool?

Our scheduling tool can help write your posts and help you monitor social trends that you can riff on as well.

Let me know if this would be useful to you and I can send over access!

Standardized
next lines

Source: *clay.com*

Complete message

Dan – Saw one of your LinkedIn posts about trusting inner wisdom in business. Seems like the last time you posted was 9 days before that though.

AI generated first line!

If you're trying to build your brand on LinkedIn, have you considered using a scheduling tool?

Our scheduling tool can help write your posts and help you monitor social trends that you can riff on as well.

Let me know if this would be useful to you and I can send over access!

Standardized
next lines

Source: *clay.com*

This concludes our detour into the world of prompt engineering. Clearly, there is much more to explore on this topic, but this overview should provide you with a foundation to get going.

Sanity Checks



“Hi Dr. . . . , Hi Miller, Hi GERHARD.

Even with proper data cleaning and solid prompt engineering, sometimes human error or misguided AI creates funny (or not-so-funny if you press Send) variables.

Therefore, always, always do a sanity check before you send your message.

Ideally, have a second pair of eyes look over your campaigns and data!

Engaging by Channel

So far, we’ve approached B2B cold outreach with a mostly channel-agnostic compass, as similar mechanisms work for fundamentals, sourcing, and enriching. But, obviously, as we dive into engaging by channel, the differences between email, LinkedIn, and cold calling are large. Each channel has its own technical setup for engaging and messaging nuances. Let’s explore these distinctions.

Engaging by Email

From the “Mindset” and “Fundamentals” chapters, you already know what a cold outreach email can look like. In this chapter, we will focus on the essential technical infrastructure. This chapter will close with templates and sequence benchmarks for email.

Infrastructure Overview

There are several options for how you can set up your cold email infrastructure. In my experience for most use cases of B2B founders, a setup involving smartlead.ai as an email outreach and automation tool makes most sense. As of today, smartlead.ai offers unlimited mailboxes, unlimited warm-ups, a multichannel infrastructure, and a master inbox.

Still, let's discuss other email infrastructure options briefly. I freely adapted these from Vovik Tsybulskyi:

1. Smartlead/Instantly/Apollo

- Purchase outbound domains.
- Connect 1–2 mailboxes per domain.
- Send 30–40 emails per day per mailbox.

Pro/Cons

- + Great deliverability with the right setup.
- + Safety. If you burn a domain, you have other ones.
- + Integrates seamlessly with tools such as clay.com.
- + You can use Google Workspace or Microsoft 365 business emails.
- Hard to manage and needs some technical understanding.

=> **My recommendation**, in particular, is smartlead.ai for most B2B use cases.

2. Custom SMTP server

- You can purchase and build your own sending infrastructure.

Pro/Cons

- + One account can send a high number of emails.
- + You can boost deliverability with warm-up tools.
- You'll need to rotate IPs quite often.
- Not as high deliverability as using business Google or Microsoft accounts.
- Requires higher technical understanding unless you use a service provider.

3a) Services like Mailgun, Mailjet, SendGrid, Amazon

Pro/Cons

- + You get quite good deliverability.
- + You can use the best email warm-up tools.
- Some risk of getting blocked sooner or later. Cold outreach is a violation of their service terms.

=> Use for transactional emails such as: Welcome, Invoices, Comments.

4. Use Mailforge - cold email infrastructure

Pro/Cons

- + Super easy to purchase domains.
- + Easy to set up, multiple-email account.
- These are not Google or Microsoft business email accounts, so I think deliverability might be lower.

This should help you to make an informed decision. Otherwise, I can recommend reading/watching material by Jesse Ouellette on that topic.

Cold Email Domains



To do cold email outreach, you should buy new domains (e.g., company.de). Important, you never should do cold email outreach with your primary business domain (e.g., firstname@company.com) or a subdomain thereof (firstname@outreach.company.com). Your primary domain can get labelled as spam by your email provider, such as Google or Microsoft. This means that your email to existing customers and event team members can be flagged as spam, which can lead to massive operational issues.

Also, don't use a subdomain for cold outreach. Domains can get blocked or labelled as spam on the domain level.

Obviously, if cold email is done right, you hardly get labelled as spam. Still, we want to avoid any disasters.

Outreach Math

So how many domains do you have to buy?

My current recommendation is this: Use 2 email accounts per domain, each sending no more than 35 emails per day, 5 days a week to stay under the radar of Google and Microsoft.

Per domain and month you can send $1 \times \text{domain} \times 2 \text{ email account} \times 35 \text{ emails} \times \text{ca } 20 \text{ days} = 1,400 \text{ emails per month}$.

These numbers are a bit conservative, but they are safe, and you won't burn domains. As always with cold emails, I encourage you to experiment with it. Generally, the better your ICP and ideal message, the less a prospect will flag you as spam. If you have a great list and great messaging, you should be able to go to 100+ emails per mailbox over time.

A Bit on Tech...

Email address structure: An email address is typically in the format `username@domain.com`. The part after the @ symbol is the domain. This domain corresponds to the mail server that handles emails for that address.

Domain ownership and email hosting: When an individual or organization owns a domain (like `yourcompany.com`), they can set up email addresses associated with that domain (like `employee@yourcompany.com`). Owning a domain gives you the ability to create custom email addresses.

Routing emails: The domain part of an email address tells email servers where to send or route the email. When you send an email to `someone@example.com`, the email system uses the DNS (domain name system) to find the mail server associated with `example.com` and then delivers the email to that server.

TL;DR: In order to do cold email outreach, you need to buy domains.

Domain Buying Guide

1. **Investment:** Don't spend significant money on the perfect domain. Typically you can get a domain for less than CHF 10. per year.
2. **Domain registrar:** To buy your domain, navigate to a domain registrar such as <https://godaddy.com/> or cloudflare.com. For these big ones, there is lots of supporting material and integration with Google or Microsoft inboxes, which makes the setup much easier.
3. **Top-level domains (.com; .de; .ch; .uk.; .io):** Avoid using .xyz, click, .top, .xyz, .link, .club and other uncommon domains names used by spammers. I typically use .com and fall back on .de, .ch, or .uk., depending on the geographies I am reaching out to.
4. **Similarity:** Your primary domain name @domainname.com should be similar to your company name. Here are some example for thefactory.com:
 - A. Add "the": thesalesplaybook.com
 - B. Add "we": wesalesplaybook.com
 - C. Add context: b2bsalesplaybook.com
 - D. Vary top-level domain: salesplaybook.de, the salesplaybook.ch
5. **Domain reputation check:** Check if your domain is on any blacklist already, and only buy it if it's not on any blacklist!
 - A. MX Toolbox - <https://mxtoolbox.com/blacklists.aspx>: (over 100 blacklists)
 - B. Spamhaus - <https://check.spamhaus.org/>
 - C. Spamcop - <https://www.spamcop.net/bl.shtml>
 - D. DNSBL.info - <https://www.dnsbl.info/dnsbl-list.php> (40 blacklists)
6. **IP address reputation check:**
 - A. Talos Intelligence - https://talosintelligence.com/reputation_center/lookup
 - B. Barracuda Central - <https://www.barracudacentral.org/lookups/lookup-reputation>
 - C. Sender Score - <https://senderscore.org/get-your-score/>

Email Infrastructure

Now, as you have bought the domains, you have to create an account with an email service provider such as Google (Google Workspace) or Microsoft (Microsoft 365). They provide you with the following:

- **Email hosting:** This means they manage the servers that store and process our emails. When you send or receive an email, it goes through these servers.
- **Email addresses and management:** They provide you with the ability to create and manage email addresses associated with your domain (e.g., `yourname@yourcompany.com`). This is important for maintaining a professional appearance in business communications. You should strictly avoid sending cold emails from `firstname@gmail.com`.

Okay, so how is this connected to the domains you just bought? The domain lying with your domain registrar and email service providers can be linked by publishing MX (Mail Exchange) DNS records with your domain registrar.

So, far so good. Now, to ensure great deliverability, there are some email protocols you must set up. Bear with me, as this will get a bit technical, but you will manage to wrap your head around it.

DNS and Email Authentication Protocols

First, let's ensure you can send emails from a certain domain.

Role of MX Records in DNS:

MX records are a type of data in the DNS specifically used for email delivery. When someone sends an email to an address at your domain (like `user@yourdomain.com`), their email server queries the DNS for the MX records of `yourdomain.com`. These MX records indicate which mail servers are responsible for receiving email on behalf of your domain, and their priority if you have more than one mail server.

Connection to Your Email Provider:

Your email provider, such as Google Workspace or Microsoft 365, will have its own mail servers where your emails are received and stored. When you set up your domain with an email provider, they will give you the details of their mail servers, which you need to enter into your domain's DNS settings as MX records. This setup directs all incoming email traffic for your domain to your email provider's servers.

How to create an MX record for your Google Workspace: go to your domain registrar/DNS provider and enter a MX record(s) such as the one below.

Name/Host/Alias*	Priority	Value/Answer/Destination
Blank or @	1	SMTP.GOOGLE.COM

Please note, email providers give you extensive guidelines on how to do that. If you are using a combination of Google Workspace and Cloudflare, you do not have to do manual entries.

Now, you technically could start sending email. However, to ensure a high deliverability of the email, you must set up the following email authentication protocols in your DNS records.

Let me walk you through the basics:

DNS (Domain Name System):

Role: DNS is like the phonebook of the internet, translating human-readable domain names (like company.com) into IP addresses that computers use to identify each other on the network.

SPF (Sender Policy Framework):

Role: SPF is an email authentication method designed to detect forging sender addresses during the delivery of the email.

Connection with DNS: SPF records are published in DNS. They specify which mail servers are permitted to send email on behalf of your domain. When an email is received, the receiving server checks the SPF record via DNS to verify that the email comes from a permitted server.

Example record: "v=spf1 include:_spf.google.com ~all"

DKIM (DomainKeys Identified Mail):

Role: DKIM is another email authentication method. It allows the sender to associate a domain name with an email message, thus vouching for its authenticity.

Connection with DNS: This is done by "signing" the email with a digital signature, a cryptographic technique. A DKIM signature is a header added to the message and is verified using a public key published in the DNS records of the sending domain.

Example Record: "v=DKIM1; k=rsa; p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQC..." (the p= part will be a very long string of characters, which is the public key).

DMARC (Domain-Based Message Authentication, Reporting, and Conformance):

Role: DMARC builds on SPF and DKIM. It provides additional capabilities, notably reporting and policy enforcement on how to handle email messages that fail SPF or DKIM checks.

Connection with DNS: DMARC policies are published in the DNS records of the domain. These policies inform email receivers what to do if an email fails SPF and DKIM checks (e.g., reject the email, quarantine it, or do nothing).

Example Record: “v=DMARC1; p=reject; rua=mailto:dmarcreports@examplecorp.com”

In summary, while DNS is a fundamental component of the internet's infrastructure, SPF, DKIM, and DMARC are specific protocols used for email authentication and security. They all use DNS to publish certain records. Implementing SPF, DKIM, and DMARC effectively can help ensure email deliverability and protect against email spoofing and phishing attacks, thereby maintaining the integrity and trustworthiness of email communications.

Once you've bought some domains, we have to configure them correctly for cold email outreach in the DNS, Domain Name System.

Too complicated? Okay, here is how we typically explain it to our clients:

DNS (Domain Name System): Think of DNS as the internet's version of a GPS. Instead of telling you to turn left at the next street, it guides your emails to the right server. Without DNS, we'd be lost in a sea of numbers, like trying to navigate New York City with coordinates instead of street names!

SPF (Sender Policy Framework): SPF is like a VIP list for your mailbox. It's a bouncer that checks if the mailman is actually on your “approved senders” list. If a random person tries to deliver mail pretending to be your usual mailman, SPF is there to say, “Nice try, buddy!”

DKIM (DomainKeys Identified Mail): DKIM is like a wax seal on a medieval letter, but way cooler. It's your secret stamp that says, “Yep, this email is genuinely from me and hasn't been switched by some sneaky court jester while in transit.”

DMARC (Domain-Based Message Authentication, Reporting, and Conformance): DMARC is the boss of the mailroom. It takes a look at the letters with SPF's VIP check and DKIM's fancy seal and decides what to do with the shady ones. “To the inbox!” or “To the dungeon!” (aka spam folder).

In this quirky postal world of the internet, DNS gets you to the right castle, SPF makes sure the mailman isn't an imposter, DKIM verifies the royal seal, and DMARC rules on the fate of your messages!

Your DNS will typically look similar to the one below:

A	meetsalesplaybook.com	192.0.2.1	 Proxied	Auto	Edit
CNAME	engine	aplolinks.com	 DNS only	Auto	Edit
CNAME	www	meetsalesplaybook.com	 Proxied	Auto	Edit
MX	meetsalesplaybook.com	alt3.aspmx.l.google.com	 10 DNS only	1 hr	Edit
MX	meetsalesplaybook.com	alt1.aspmx.l.google.com	 5 DNS only	1 hr	Edit
MX	meetsalesplaybook.com	alt4.aspmx.l.google.com	 10 DNS only	1 hr	Edit
MX	meetsalesplaybook.com	alt2.aspmx.l.google.com	 5 DNS only	1 hr	Edit
MX	meetsalesplaybook.com	aspmx.l.google.com	 1 DNS only	1 hr	Edit
TXT	_dmarc	v=DMARC1;p=reject;rua=mailto:579cbe...	DNS only	Auto	Edit
TXT	google._domainkey	v=DKIM1;k=rsa;p=MIIIBIjANBgkqhkiG9w...	DNS only	Auto	Edit
TXT	meetsalesplaybook.com	v=spf1 include:_spf.google.com -all	DNS only	1 hr	Edit
TXT	meetsalesplaybook.com	google-site-verification=LhxJSHqIC19eL...	DNS only	1 hr	Edit

Source: *thesalesplaybook.com*

Email Warm-up

So, technically, the email infrastructure is ready with one big caveat. The emails are not warmed up. If you were a Google or Microsoft anti-spamming engineer, how would you tackle the problem of detecting spam? Well, if someone creates a new email account and instantly starts sending 100–200 emails per day, something is probably a bit fishy. I'd put such domains on my watch list at the very least.

You don't have to randomly send emails to some friends every day. You can build the reputation of your inbox by joining a network of 100k other inboxes in a warm-up network, and these people won't mark you as spam. Email providers such as Google or Microsoft can't track these warm-up networks effectively.

Steps

1. Sign up with an email warm-up provider such as follows:
 - A. Smartlead.ai (my preference currently)
 - B. Lemlist.com
 - C. Apollo.io (offline as of 31.01.2024)
2. Connect the email inboxes to the warm-up tool, e.g., smartlead.ai provides this with OAuth. See the <https://www.youtube.com/watch?v=jUOF5FaFbZs> walkthrough.
3. Add the email signature (the same one you are going to use in your real outreach).
4. Adjust the warm-up settings: max 35 email per inbox per day and ramp up increment by 3–5 per day (each day it sends 3–5 messages more). For example, it starts with 3 on the first day,

5. Start the warm-up. Only do this once you are sure all the DNS settings are correctly in place.
6. Wait and monitor the warm-up and check frequently if it really sends and receives emails. This takes 2.5–3 weeks.
 - A. Common issue 1: During the warm-up phase, if you've signed up to an email provider without a credit card, the free trial expires, and they shut down your email infrastructure.
 - B. Common issue 2: The warm-up stops for your inboxes for some reason, and you don't frequently check it. After 3 weeks, you want to start reaching out and realize the warm-up stopped 2 weeks ago. Providers such as smartlead.ai notify you when an inbox disconnects.

What if you want to start reaching out instantly? You can get some new domains and start reaching out instantly, which will probably burn them quite quickly, then switch to the domains you warmed up in the meantime. This is quite a hassle, but technically possible if super urgent.

Always warm up some extra domains to ensure sending even if a domain gets burned (labelled as spam with low deliverability).

How long should you warm up: 3–4 weeks: If you can warm up longer, that's amazing.

Custom Tracking Subdomain

Another important factor in your email deliverability is having a custom tracking subdomain. It helps you safely track email opens and link clicks without harming your email deliverability.

For tracking opens and links clicks your sequencer (smartlead.ai, apollo.io) builds in tracking pixels. This tracking pixel is linked to a tracking domain. However, if your tracking domain is different from your sender domain, you significantly increase the risk that your emails will land in spam. Example: you are sending from `florian@meetthesalesplaybook.io` but your tracking subdomain is `email.smartlead.ai`. That is an issue.

The solution? Set up your custom tracking domain. Doing so not only keeps your email campaigns clean and reputable but also boosts your sender score, enhancing deliverability.

How do you set it up? You have to create a CNAME record with your DNS provider.

FIELD	DEFINITION	FIELD INFORMATION	ADDITIONAL NOTES
DNS Record Type	DNS Records include essential information about your domain or host. To set up a tracking subdomain, you need to select the record type: Canonical Name (CNAME) .	CNAME	A CNAME record maps an alias name to a canonical domain name.
Host/Host Name/Name	Choose any name that is not directly related to your website. This name will become the subdomain in the URL that you create: subdomain.yourdomain.com	subdomainexample	• Do not include spaces. • This must be text only. • Do not include periods. • Do not include any words that SPAM filters can easily identify, such as tracking.
Value/Data/Points To	The value you enter establishes the connection between your subdomain and the Apollo tracking servers.	apololinks.com	This field must be apololinks.com .
TTL	TTL is a technical term that refers to how often your subdomain information will be rechecked by relevant servers.	Leave as Default	You can leave this field as whatever value your domain provider uses by default.

Source: apollo.io

Setup Guides:

- **Smartlead:**
<https://helpcenter.smartlead.ai/en/articles/50-what-is-custom-domain-tracking-and-how-to-set-it-up-with-smartlead>
- **Apollo:**
<https://knowledge.apollo.io/hc/en-us/articles/4415240542733-Set-Up-a-Custom-Tracking-Subdomain-URL>
- **Lemlist:**
<https://www.lemlist.com/blog/custom-tracking-domain>

Check Setup and Monitoring

Once you've set up your infrastructure and started to warm up your email accounts, you want to ensure that everything runs smoothly and monitor the process.

Postmaster tools: You can use postmaster tools to track data on large volumes of emails sent and find data about your sending domain. You can view different dashboards to understand details like email delivery errors, spam reports, feedback loops, and more. For each domain, you can monitor your score. If your spam rate it's above 3%, you should change your messaging/behavior.

- Google Workspace: <https://www.gmail.com/postmaster>
- Microsoft 365: <https://postmaster.live.com/snds/JMRP.aspx>

Postmaster only shows you data once you cross a certain sending threshold of approximately 5k emails per month.

GlockApps: Helps you to monitor your deliverability and send you an email report across all your domains for DMARC, SPF, DKIM status. Also, you can run spam/seed tests in order check if any of your email accounts lands in spam.

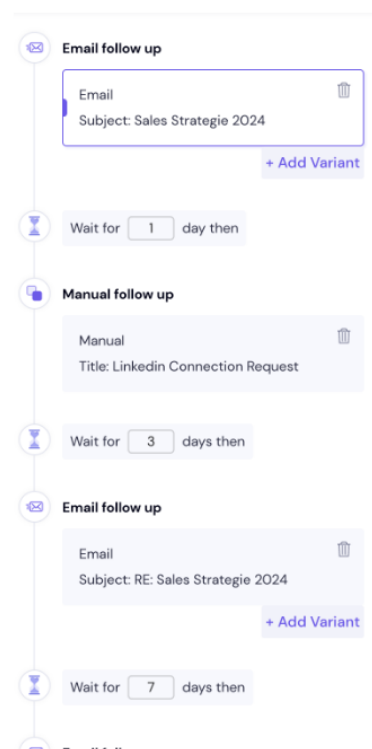
- GlockApps: <https://glockapps.com/>

We covered DNS technical setup in order to prevent spam and ensure high deliverability. Again, the key to avoiding spam is (1) stay relevant, and (2) mind your copy, avoiding spam triggers like all caps or red font. We will dive a bit deeper into spam triggers in the section "Email Content Checklist."

Sequencer

An email sequencer allows you to automatically send emails to contacts on your list.

Sequencer smartlead.ai



Currently, we are mainly using 2 sequencers:

Smartlead.ai:

- + Integrates well with clay.com and HubSpot
- + Has warm-up functionality

Apollo.io:

- + Integrates well with HubSpot
- + Comes with a large contact database
- Does not integrate that well with clay.com
- No warm-up functionality as per 31.01.2024

Email Copy Obligatory Tips

- Keep the email shorter than 100 words.
- Stay away from spam words.
- Clearly communicate the reason you are reaching out.
- Make the message about them, not you.
- Use social proof that has quantitative results in it.

Source: *Eric Nowoslawski*

Email Copy

Email Copy Checklist

Headlines

Avoid spammy subject lines, ALL CAPS, and exclamations!! (can be filtered as spam automatically based on these alone)

Spam keywords

Use hemingway.app or another spam word checker to try to avoid keywords that might trigger a spam filter.

<https://hemmingway.app/>

Personalization	Use merge tags and CSV columns to personalize your emails. Variation in copy increases deliverability. Personalization improves open and reply rates - which improves email reputation	https://smartwriter.ai https://clay.run
Font	Don't use a red font, use black font.	https://smartwriter.ai https://clay.run
Grammar	Use spell check.	https://app.grammarly.com/
Physical mailing address	Include your physical mailing address, usually in your signature.	
Inline images	Don't have inline images in the first email. If you need to include images, put them in the follow-up emails. Only use compressed images and no more than one.	
JavaScript/HTML	Don't use Flash or JavaScript in your email. Don't use too much HTML content. Best practice is to maintain a 60:40 text to HTML ratio. Don't embed forms.	

Multiple links	Avoid links as much as you can. Only link if you need to have it, and use your primary domains. Each link increases the chance you'll be filtered by the spam classification engine. Use fewer than two links in the whole sequence.
Attachments	Avoid large attachments and certain attachment types, such as .exe, .zip, .swf, etc.
A/B Testing	Test different copy angles, subject lines, and personalizations. Turn off variants performing poorly to boost campaign performance
Spintax	"{Hi Hello Hey}" spintax increases deliverability by increasing the randomization of messages. The more "different" each message is from the others, the higher the chance it lands in the lead's inbox. Spintax lets you do that by allowing you to use multiple variants of the same word/synonyms.
Unsubscribe links	Add an unsubscribe link or an option to stop a sequence, to prevent your follow-ups from being marked as spam. "PS: Please let me know if you are not the right person to contact for this."

Source: *thesalesplaybook.com*

Subject Lines and Email Preview

We keep this very short and on point and limit it to max 5 words. What do I mean by that? For SalesPlaybook, the following subject lines worked quite well:

- Sales Strategy 2024
- <Company> Sales Strategy 2024

Ideally, you want to send something that sparks intrigue to open the email. But do not go into salsey subject lines like, "Revolutionize Your Revenue: 2024's Game-Changing B2B Strategies."

Another thing to keep in mind is the email preview text. This should not look like the typical cold email, and that is why you put a phrase on "why you" and "why now" in the first sentence of your email.



| **Online Marketing** - Hello! Florian Lussi. I just found your company and are loving what you got going. I'm the founder of Hest

Calls-to-Action (CTA)

You have to experiment a bit with that. I've seen both work.

The hard CTA:

- Would you want to hop on a short call about this?
- If we could help you to fix your CSV upload issue, would you want to hop on a call about that?

The soft CTA:

- Are you facing a similar challenge?
- Is that relevant to you?

Leading Questions vs. Neutral Questions

Steer clear from any leading questions such as the following:

 *Would you like to close 100k EUR in new revenue next month?*

This often makes prospects defensive, as they can smell the commission breath, and you push them to your desired answer.

Instead go for neutral questions such as the following:

 **How do you leverage the LinkedIn network of your sellers effectively?**

The idea is to cut to the bone of the prospect's problem. But for this you must have an extremely solid understanding of your prospects and their problems (ICP and buyer persona template).

Source: joshbraun.com

Sequence Length

We use a max of 4 emails in a sequence, as we see that beyond 4 emails, there are very few positive responses. More than 4 emails in a sequence can come across spammy, especially in DACH.

Sequence Structure

Eric Nowoslawski wrote a neat piece on their email structure. I agree with this 90%, and I've used this below and added our spin to it:

- Email 1: Net new email
- Email 2: Threaded to email 1
- Email 3: Net new email
- Email 4: Threaded to email 3

Net new email = new subject line.

Why do you want to introduce a “net new email”?

Typically, with **Email 1**, you get more positive responses than from any other email. You don’t want to remind your prospect over and over again that they did not yet reply to your previous messages.

Email 2 is often added on top of the context of Email 1, and we need it threaded.



Let’s review the sequence structure from Growth Engine X and adapt it to your business.

Email 1

- Purpose: introduce the offer
- Content: offer, why you are reaching out, why this email is worth their time

Email 1 Structure

{{first_name}} – {{Lead with a sentence explaining why you are reaching out to them and what research you have done. Answer the, “Why you, and why now?” question.}}

{{Add a poke-the-bear question to make them think about how they are solving their current problem OR segue into the homework you’ve done into how you can help. Read more below in “Copywriting Tips” about poke-the-bear questions, coined by Josh Braun.}}

{{Social proof}}

{{Call to action}}

Email 2

- Purpose: Provide more context
- Content: How you can help and what this means for their business or personally

Email 2 structure

{{first_name}} – {{AI-generated line we use to still make this email personal. Sometimes it’s using relevance, sometimes it’s using something recent, and sometimes we make an analogy between our company and theirs.}}

{{Explain in more depth how we made that case study possible.}}

{{Call to action similar to the first email.}}

Email 3

- Purpose: Get any response, lower friction to respond
- Content: Change up the proposition and messaging

Lower friction by changing your CTA from something like, “Would you be open to discussing this on a call this week?” to, “If I were to make a video going over our process for you, would you watch it?” We want to lower the friction it takes for the prospect to engage with you and take more of that on ourselves. Any kind of engagement is the goal here.

Change up the value proposition. I'll speak more on this in the “Copywriting Tips and Best Practices” section, but basically, every B2B offer does 3 things: helps people save time, helps people make more money, or helps them save money. If in email 1 you talked about saving time, here you want to talk about saving money.

Email 3 Structure

{{First_name}} – {{Often for this first line, we use something similar to email 1 and do another line about why we are reaching out now.}}

{{Poke-the-bear question that was different from email 1}}.

{{New social proof around a different value proposition}}

{{CTA that is lower friction for the prospect to respond to}}.

Email 4

- Purpose: Get any response.
- Content: Break up without coming across as desperate.

Our email 4 asks if this really isn't a problem for them AND checking with them to see if maybe we aren't talking to the right person. Our standard email 4 is below.

{{first_name}} – I know there's about {{employee count}} employees over at {{company_name}}, and perhaps {{job to be done}} is not your responsibility. Should I reach out to {{name other person on team}} instead, given their role?

We found this gives a good enough signal to them that the end of the sequence is coming and looks very personalized because of the callout to the other employee in the department. Make sure you use that person's whole name.

Campaign Examples and Benchmark Campaigns

At thesalesplaybook.com/out-templates, I've put together the templates we really liked and worked well for us. Use it as a source of inspiration rather than copying and pasting whatever you find there.

Engaging by LinkedIn

The State of LinkedIn Today

LinkedIn today has over 1 billion members, and every day 250k new members join. LinkedIn is still going strong. However, it also became quite heavily flooded with cold outreach, and even the most targeted cold outreach does not always lead to the desired results.

That's why we often recommend a two-pillar strategy to our clients.

Pillar 1: Social selling, less direct and longer-term strategy.

Pillar 2: Cold outbound, similar to cold email.

Now you are wondering, "But why is social selling part of a cold outreach handbook?" Because it works great in combination with LinkedIn cold outreach, and the initial push is often cold as well. Let me elaborate in the next 2 sections.

Pillar 1: Social Selling

The idea of social selling is to cultivate a relationship before you pitch or, ideally, don't pitch, so your prospect knows that you are the go-to person for x. The 3 do's of social selling are as follows:

- ✓ **Build relationship:** Engage with content and share content/insights in your area of expertise.
- ✓ **Have a value-first mindset:** Don't think about the sell; create value at scale for your target group.
- ✓ **Move from LinkedIn to Call:** You won't run the sales process on LinkedIn, at some point you should move to a call or offline.

Social Selling on LinkedIn in Practice

I was always a bit confused on how to look at LinkedIn and social selling—until recently, when I talked to Steven Morell.

Steven advises go-to-market (GTM) teams on social selling and has developed <https://myteamfluence.com/>, which helps GTM teams measure and grow their network of contacts.

Steven has gathered extensive data on LinkedIn and has some unique insights into how social selling works on LinkedIn:

The average head of sales possesses roughly 2,000 LinkedIn connections, many of which are irrelevant. The average seller might have around 400 LinkedIn connections, half of whom are university and school friends. Out of these, 350 of their connections are rarely on LinkedIn or see LinkedIn mainly as a job platform.

This implies that it makes little sense for these sellers to start posting content before they have 1,500 connections, many of which should be relevant to their product or service.

Also, the typical seller does not become a thought leader. So what's the alternative? Unlike on TikTok, YouTube, and Facebook, where you need to create content to gain followers, on LinkedIn, there is another way!

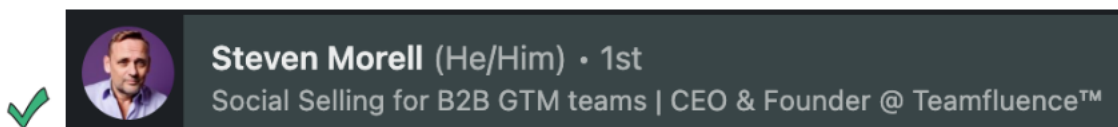
You can comment on relevant posts from thought leaders and target accounts. And by commenting, I don't mean simply saying, "Great," or just liking, but actually using conversation starters such as the following:

- Opposite points of view
- Relevant and specific questions
- Expanding on the posts



Important: When commenting, only your headline will be visible in the posts (See screenshot below.)

Make sure your LinkedIn headline is razor sharp:



My favorite analogy from Steven is “working the room” at a trade conference. When you comment and start conversations, it’s like conversing in the lobby. You pick up ongoing conversations and click yourself in.

Following the analogy, the keynote speakers are like the large LinkedIn profiles that have a lot of reach and frequently post content.

The person at the door distributing flyers is the person sending a lot of cold email messages on LinkedIn, which are mostly ignored.

That’s why I much prefer to send a connection request that is non-threatening and not salesy, such as the following:



Hi Florian, looking to extend my network with other sales leaders (very targeted). Let me know if there is something I can do for you.



Hi Florian, did you know that Direct Outreach is one of the most efficient marketing channels available to any company, regardless of budget? It might solve some of your lead-generation challenges. When would be a good time for us to discuss this further?

Typically, I get a 60–70% acceptance rate for connection requests.

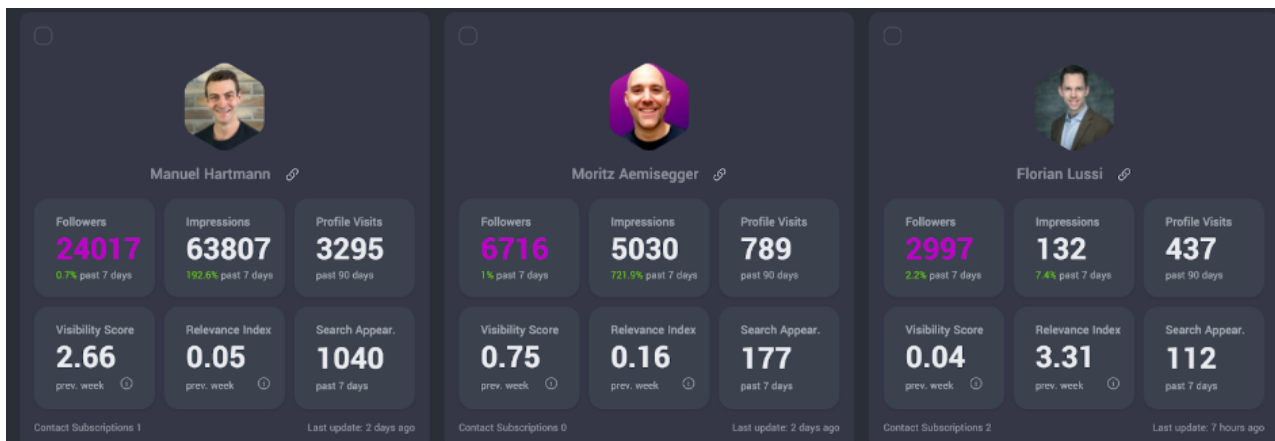
What does this mean for go-to-market teams?

- The number of connections on LinkedIn in your specific niche is important, not just the overall number of connections. Think trade fair versus pedestrian area.
- Content production on LinkedIn is a major lever if you have a large enough audience. If your audience is small and mainly not in your niche, you’ll end up doing a lot of work that does not resonate. Ensure that you first build your target audience and only then start content production. Here again, not every seller is a great copywriter capable of writing thought-provoking, intriguing, thought leadership content.
- Use the comment section to start conversations by adding value to the dialogue.
- Use a tool such as Teamfluence (<https://myteamfluence.com/>) to (a) leverage your team’s LinkedIn network, (b) collaborate closely as a team, and (c) measure your team’s efforts

What are the KPIs?

- **Followers:** Again, not all followers are equal. Build an audience of your target accounts. Think trade show versus pedestrian zone.
- **Impressions:** Largely a vanity metric. It's basically like the person at the door of the trade show counting how many flyers they've distributed.
- **Number of profile visits:** This is a key metric, as your LinkedIn profile serves as a landing page, and a visit is a precursor to booking a meeting. Your profile banner and top section should answer three questions:
 - What do you offer?
 - Is this for me?
 - What's the next step/lead magnet (with UTM parameter)?

Also, check out the chapter on landing pages, where I walk you through the components of a great LinkedIn profile in detail.



Source: myteamfluence.com

GTM leaders who take go-to-network seriously have started to have KPIs for the number of relevant comments written and connection requests sent.

Pillar 2: LinkedIn Cold Outreach

The second pillar in the LinkedIn outreach strategy is to actually cold outreach to prospects. See “sourcing” chapter on how to use LinkedIn Sales Navigator to find relevant accounts.

You have 2 ways to message LinkedIn members:

- **InMail:** InMail messages is a premium feature, and it allows you to directly message another LinkedIn member that you're not connected to.
- **Connection request:** You are inviting another LinkedIn user to connect and become part of your professional network on the platform.

Honestly, I've got little experience with InMails and ignore all of my InMails. This is why I will focus on connection requests. However, depending on your use case and budget, InMails can be worth a shot!

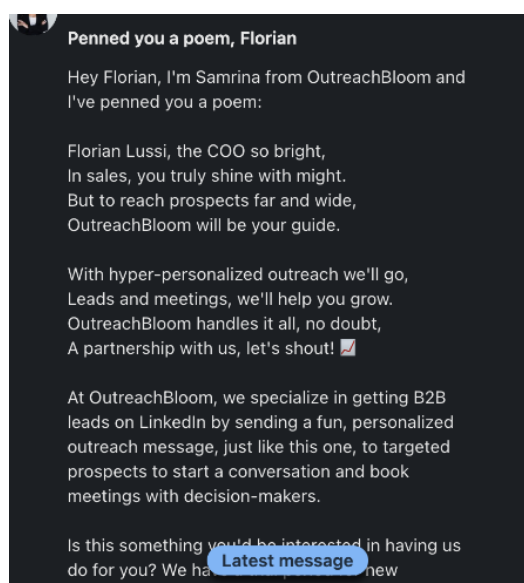
So what's the diff?

Difference to Email

LinkedIn is not an email replacement. It is a social network. People go to LinkedIn to distract themselves from work, not to get more stress on their table. As a social network, the desired setting is one of a casual conversation, very much as if bumping into someone at an event (or even a coffee shop), and this reflects in the messaging, which is much more casual.

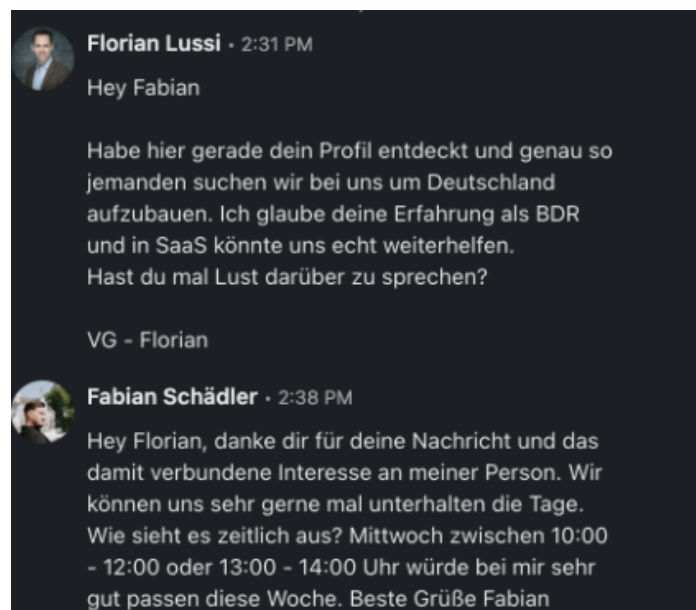
As with email, the same guideline holds: relevance trumps any personalization.

See the LinkedIn message below. It comes across as quite personalized, but I could really not care less about a poem from a total stranger. Still, the voice is often much more informal on LinkedIn than on email.



Source: *thesalesplaybook.com*

In the height of SaaS B2B seller scarcity in early 2022, I launched the following campaign, which illustrates again the informal voice on LinkedIn. As mentioned, LinkedIn has become much more crowded in the meantime, and you'd better be hyper-personal AND relevant.



Source: thesalesplaybook.com

LinkedIn Copy and Sequence

At thesalesplaybook.com/out-templates, I've put together the templates we really liked and worked well for us. Use it as a source of inspiration rather than copying and pasting whatever you find there.

LinkedIn Copy

General Guidelines]

- Relevancy trumps personalization.
- Tone is typically a bit more informal.
- You have character limitations (which is not necessarily bad ;-))

Connection Request

Before you can write to someone, they have to accept your connection request (unless you use an InMail). With the connection request you can send an optional message, which is limited to 300 characters (LinkedIn Premium). However, often we don't use message (for better conversion) and leave it empty or go with something nonthreatening, such as the following:

Hi Florian, looking to extend my network with other sales leaders, let me know if there is something I can do for you.

You can also go with something more direct. However, you will add fewer prospects to your network, as the conversion is typically lower.

If you go for a more direct approach, you need to write extremely succinctly and on point.

Here is a great example I recently received from the ClickUp Agency:

Hi Florian, managing your ProServe delivery of outbound engines with ClickUp can be a bit of a hassle. Happy to connect and review your setup and see if a collaboration makes sense?

They figured the following:

1. We are a professional service firm that uses a tool called ClickUp to orchestrate delivery.
2. I am likely to be one of the guys in charge of delivery.
3. We still have some issues to be solved in ClickUp.

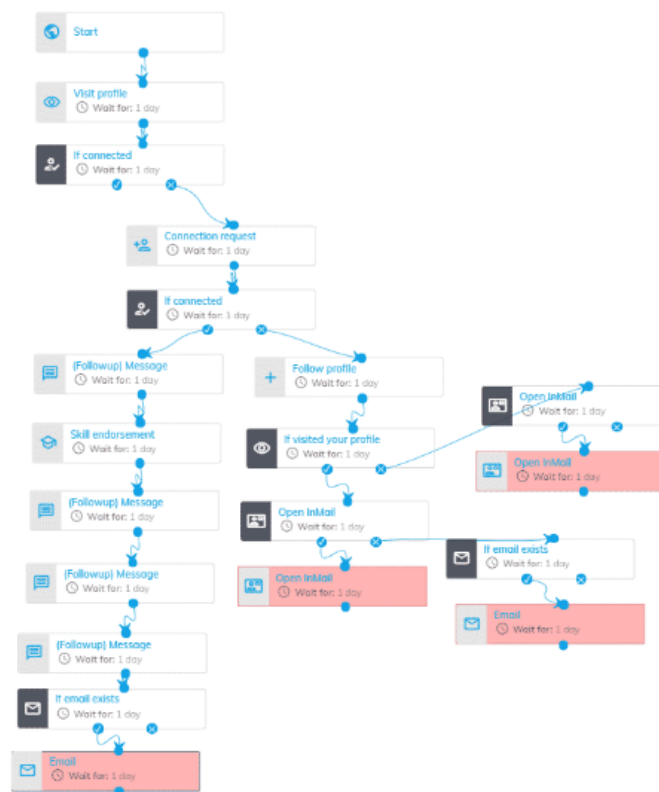
Follow-Up Message

Once your connection request has been accepted, you can send a follow-up message. You can use the email copy as a guideline and go a bit less formal, or you can experiment with customized video or audio messages.

Tooling

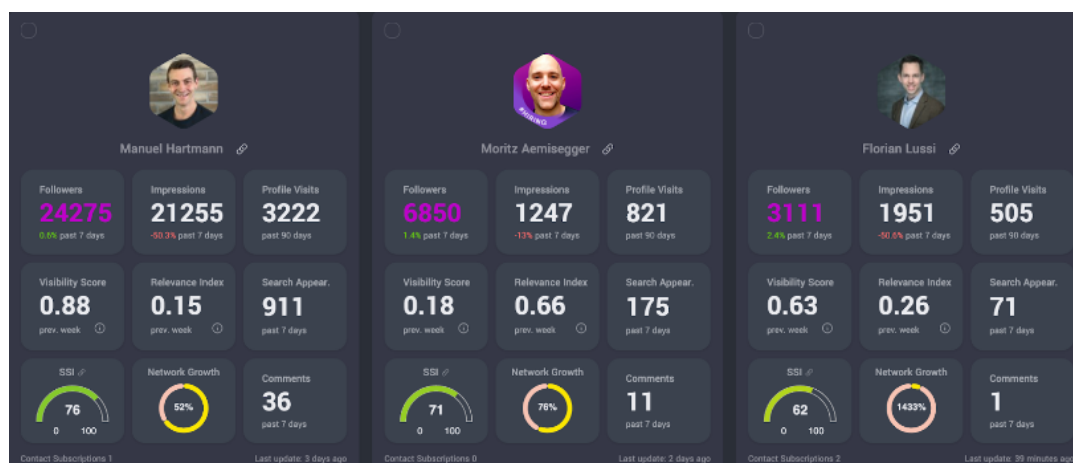
Similar to email, you can automate your LinkedIn outreach, and you can also leverage tools that help you to do social selling across the team. Here are a few tools to consider:

Expandi: Works like a sequencer but for LinkedIn. You load your list of profiles that you'd like to connect to, and Expandi does the rest (see sequence below). However, I recommend keeping your sequence simple and abstaining from liking posts doing skill endorsements.



Source: expandi.com

Teamfluence: For the first pillar, Social Selling, I recommend that you use a tool such as Teamfluence to leverage your team's network and hold the team accountable to grow your collective reach on social media.



Source: myteamfluence.com/

Engaging by Cold Calling

This version of the Ultimate Outbound Guide for B2B Entrepreneurs only covers the very basics of cold calling but should get you going. I will extend this chapter in future versions.

The State of Cold Calling Today

In 2024 cold calling still works rather well in DACH. However, UK and USA are rather burned, and it's really tough. For Switzerland, it helps a lot if you speak Swiss German.

Tech Setup and Sourcing

Ideally, you are using a dialer such as aircall.io, which you can use directly out of your CRM (HubSpot, Salesforce, Pipedrive).

Check out the sourcing chapter, especially for calling using a direct phone number, which you can find on Cognism, Lusha, or ZoomInfo.

Cold Calling Basics

- Fluctuate your voice
- Speak very slowly
- Get real
- Practice with the team (first 60 seconds have to be perfect)
- Voice message: "Hi, Thomas, it's Patrick. Call me back at (insert No.). Looking forward to talking to you."

Cold Calling Elements

Here are the SalesPlaybook elements of a cold call:

- Introduction: Keep it simple by introducing (1) who you are, (2) where you are from and (3) why you are calling
- "Opt-In": Get an "opt-in" from the human being on the other end to have an attentive conversation for 2–5 minutes
- Discovery: Define 3–5 key questions that you need answers to gain understanding, create intrigue, and qualify.
- "Mini Pitch": Give 3–5 facts about what you achieve for the customer with social proof, approach, and offering.
- Call-to-Action (CTA): Date in, Date out. Get a commitment from a prospect for the desired follow-up activity.
- Bonus: Try to already understand and execute on the buyer journey

Source: *thesalesplaybook.com*

Gatekeeper

Sometimes you reach a secretary or assistant to the person you want to talk to. Often their job is to filter people like you out. Below you will find the most common gatekeeper questions and how you can respond to them:



Navigating Gatekeeper in Action

Gatekeeper: Victorinox, good morning.

Moritz: Hi, this is Moritz. John Smith, please.

Gatekeeper: Who is this?

Moritz: Tell him it is Moritz. Is he in the office today?

Gatekeeper: What company are you calling from?

Moritz: It's XYZ. He should be familiar with us. Can you connect me?

Gatekeeper: What are you calling about?

Moritz: I am calling concerning your digital document account/service/program. I need to speak with the person who handles this.

Gatekeeper: Have you been in touch before?

Moritz: No, that is why I am calling. Can you connect me, please?

Gatekeeper: First contact has to be by email—company policy.

Moritz: I understand. Our company policy is that first contact concerning this topic has to be by phone. Can you connect me, please?

=> Can I leave a voicemail instead? (worst-case scenario)

Gatekeeper: Everyone is still working from home at the moment. I can't connect you.

Moritz: I understand. I am also working from the comfort of my home right now. Given the situation, what would be the best way for me to get in touch with him?

Gatekeeper: In a meeting. (personal assistant)

Moritz: I'd imagine he/she is really busy. Even if I got through, he/she would be super busy, right? Would it be better to email them? Can I CC you so he/she knows we spoke?

What I want to share with him/her is really important. What would you recommend for me to get in touch with him/her?

Cold Calling Script

Let me walk through a simple but effective cold calling script:



Him: Thomas Müller

Me: Hi, Thomas, it is Patrick Trümpi from Unique. Good afternoon.

Him: Hello, Mr. Trümpi.

=> Say hi twice

Me: Marcus, we do not know each other just in case you are asking yourself that question. Do you mind taking 35 seconds so I can explain exactly why I called you?

Him: Yes, you have 35s exactly (smiling).

Me: Perfect, thank you. I am talking to a lot of leaders of contact centers at banks who tell me they have one challenge. Their employees usually need 1 to 5 minutes for documenting calls after every single interaction. That is a lot of time throughout the year. Are you familiar with that topic?

=> Relevant social proof, followed by the challenge.

Him: Oh, yes, I am.

Me: You are?

Him: Yeah, definitely.

Me: Do you actually know how much time it is in your case?

Him: 3 minutes, 23 seconds.

Me: Hahaha, wow, that is really precise.

Him: Yeah, I needed the number for today's executive board meeting.

Me: All right, now that the 35 seconds are over, can I take a little more time to explain to you how we can potentially reduce that number?

Him: Yeah, go ahead, I have a meeting at 12:30, so you have a bit more time.

Source: *Patrick Trümpi*

Landing Page Conversion Optimization

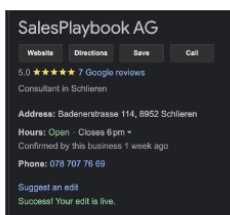
Usually, after I receive a decent cold outreach that addresses one of my problems. I check out the website and/or LinkedIn profile of the person that contacted me. Google Business profiles, websites, LinkedIn profiles and pages all serve as a first point of reference, as the bridge between the initial contact and the deeper engagement with the potential client. In this chapter, we briefly touch on the basics.

Google Business Profile

For a long time, I was not aware that this somewhat important until I've did some cold outreach for SalesPlaybook and had 2–3 prospects pointing out that our Google Business Profile is not up to date. Still, I would not spend much time and money on updating it.

Steps:

- Claim your Google Business Profile.
- Update it and ensure that all links work.

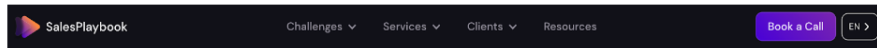


Source: *google.com*

Website

CTA Button and Discover Quiz

Again, very basic, but ensure that if a prospect comes to your site (1) they can make an informed decision about whether it's worth booking a call with you, and (2) that they actually easily find the button "Book a Call."



Source: *thesalesplaybook.com*

On your end, especially if you exactly know who your ICP is, ensure that you also qualify and disqualify prospects with a discovery quiz. Either display the quiz before they book a call (especially when you have enough demand) or after they've booked a call, and you can still carefully reject calls if they are not a fit. Let's check out an excerpt from a discovery quiz:



Example Discovery Quiz Excerpt:

I want to scale sales quickly (in EUR '000):*

- ☐ From 0 to 100k: Launching my (new) business and enter new markets 2-3x faster
- ☐ From 100k to 1M: Grow my business from 6- to 7-digit revenue in quarters instead of years
- ☐ From 1M to 10M: Scale 7- to 8-digit revenue & make my business (more) people-independent
- ☐ From 10M to 100M: Become Category King & go IPO
- ☐ I don't want to grow my Annual Revenue by 100-400% per year

My primary sales challenge(s) preventing me from scaling 10x is:

- ☐ Generate qualified pipeline: I struggle to identify, attract & drive my qualified sales pipeline
- ☐ Close bigger deals faster: Increase win rates & deal size while shortening sales cycles
- ☐ Scale sales efficiently: Deploy & operate repeatable, predictable, scalable structures

I see sales as the #1 driver of enterprise value & commit to invest this amount per year with an external partner:*

- ☐ EUR 50-250k to add EUR 1-10M in enterprise value
- ☐ EUR 25-50k to add EUR 250k-1 Mio. in enterprise value
- ☐ EUR 10-25k add EUR 100k-250k in enterprise value
- ☐ I do not see B2B sales as a key value driver & am therefore will not invest significant funds

I identify most with this profile:*

- ☐ DACH B2B SaaS Founder with EUR 100k-10 Mio. ARR speaking German/English
- ☐ European B2B SaaS Founder with a ready-to sell offering speaking English
- ☐ DACH CEO / Sales Lead with a (productised) services B2B sales model
- ☐ Other entrepreneur that is 100% committed to scale B2B sales quickly
- ☐ None of the above

How much on average does your ideal customer invest with you per year?*

- ☐ 100-1'000: We have a de facto B2C market offering and look for a self-service purchase motion
- ☐ 1'000-10'000: Our deals should close within weeks within 1-3 video calls after inbound marketing
- ☐ 10'000-100'000: We sell to multi-stakeholder organisations at sales cycles of 3-9 months
- ☐ 100'000-500'000: We sell complex deals to large organisations, often taking 6-18 months
- ☐ >500'000: We close big deals from RfPs (Requests for Proposal) and Account-Based-Selling
- ☐ I have no idea yet about how to price our market offering.`

Source: *thesalesplaybook.com*

As this is only an excerpt, some questions are missing, but I think you get the point. The idea is to qualify or disqualify the prospects and try to understand the prospect's problems in order to have an informed and well-prepared call.

Case Studies and Testimonial

Prospects who come to your website usually check out your testimonials. For thesalesplaybook.com, I've got a very good understanding of the path prospects take (using a tool called Clearbit). Prospects almost always check out one of the testimonials before they book a call.

So if you have not yet captured great case studies from your existing customers, below are the questions that lead to a great case study.

Objective	Testimonial Question	Follow-Up Questions
Understand the challenge	What challenge did you face before working with us?	Ask for a concrete example.
Raise objections proactively	What initially prevented you from buying?	What did you find upon buying the product/service?
Get "killer testimonial"	What specific thing do you like most?	What did the implementation of the solution result in <Metric 1, Metric 2, Metric 3>?
Enrich customer success story	What three other benefits immediately come to your mind?	Ask what this means for the customer's business or financial ROI, but also emotionally.
Uncover future potential	What do you want to achieve with our solution in the future?	How can we support you to get you there?
Receive buy-in for referrals	Who could also really benefit from working with us?	Ask for 2 concrete intros your customer can make within the next 14 days.
Uncover hidden feelings	Is there anything else you'd like to share?	Thank your customer for his trust, support, and time.

Source: thesalesplaybook.com

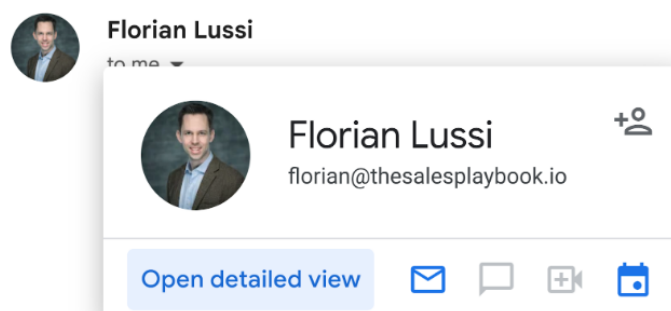
Optimization of Email Profile

I've not AB tested this extensively, but I you want to go the last mile. You can also add a website or LinkedIn link and profile picture to your email account profile.

For Google

Profile picture: <https://myaccount.google.com/personal-info>

Profile links: <https://myaccount.google.com/profile/links>



Source: *thesalesplaybook.com*

LinkedIn Profile/Company Page

As for the website, if you reach out by LinkedIn, make sure that your LinkedIn profile is optimized for conversion. Let's check out a great profile:

The image shows a screenshot of the LinkedIn profile of Thomas Reck, CEO of Insight Consulting GmbH. The profile is annotated with yellow arrows and text boxes pointing to specific elements:

- insight**: Professional Banner
- We scale trust.**: Catchy Slogan
- Mehr Vertrauen durch C-Level-Personal-Branding**: Social Proof Client Logos
- CLANEO, Auctus, NEUTRAL, ZOO, DealCircle**: Client Logos
- Thomas Reck**: 1st
- CEO @Insight Consulting | Helping CEOs build more trust and growth through C-level Personal Branding**: On-Point Headline
- Talks about #startup, #branding, #personalbrand, and #entrepreneurship**: Accurate Service description
- Berlin, Berlin, Germany · Contact info**: Website or Book Appointment Link
- https://insight.berlin/**: Website or Book Appointment Link
- 19,188 followers · 500+ connections**: Social Proof
- Lars Krüger, Fabian Schädler, and 90 other mutual connections**: Social Proof
- Message, Save in Sales Navigator, More, Teamfluence™**: Call to Action buttons
- Providing services**: Accurate Service description
- Lead Generation, Brand Marketing, Content Marketing, Content Strategy, Demand Generation, Digital Marketing...**: Accurate Service description
- Show details**: Call to Action button
- About**: Intriguing About Section, Laying out the Perspective/Thesis on the Problem
- ↑ We know why your marketing has not yet generated the desired results for you and your company:**
- Trust!**
- People only work with people they trust.**
- Trust is the most essential resource for your B2B service.**
- Most companies invest 6 to 7 figures in marketing activities such as trade fairs, PR, keynotes, website, and SEO to build trust with their target group.**
- The price for these measures increases from year to year.**
- Featured**: Book a Call Link
- Link**: More Industry Best Practice & Social Selling
- Link**: More Social Proof or White Paper
- insight**: Link
- Insight Power Hour**: Link
- Insight Power Hour | Podcast Spotify**: Link
- In diesem Podcast spricht Insight Co-Founder Thomas Reck mit B2B-Marketing-Experten und erfolgreichen Personalmarken**: Link
- Business Insider: LinkedIn für**: Link

Source: LinkedIn Profile Thomas Reck

Reality Check with DACH Thought-Leaders

Interview Patrick Trümpi



How do you see cold outbound outreach in general in 2024? What has changed? What do you have to do in 2024 to be successful?

Not much has changed, to be honest. A lot of people talk about how the whole thing has changed and now it's a different game. It's not. We've had a lot of automation during the last years. We had Salesloft, Outreach, Lemlist, and so on. So you can send emails or LinkedIn messages in a much faster way to many more people than before and slightly personalize them. But I would not call replacing the company name or first name personalization.

Because of automation we have a lot more bad-quality outreach but still about the same quantity of great cold outreach.

A few years ago you still may have had a bit more success if you weren't that good. But now I think you are required to really, really nail it. You must nail relevancy. That's the first criteria. And then if possible and applicable, you can also personalize.

Like if you find a post about a person, if you find something online about a person that makes sense in the context of you, you can use that and be successful.

Generally, still, all the channels (Email, LinkedIn, Calling) are good. Cold calling had a bit of a surge during the last year, as the call tools became very effective and efficient with tools like Aircall and direct numbers from Cognism, Lusha, etc., which means you do not have to go through a gatekeeper very often.

For email and LinkedIn, it is the same. If you do it really, really well, you will have success.

For LinkedIn, I think you can use a bit more alternative methods like video and audio. So I definitely recommend downloading the app there and doing that. And email, yeah, it depends. It's not good to put in links.

Can you dive a bit deeper into how you see LinkedIn as a channel 2024?

First of all, I would not necessarily use just the messaging. I would do it differently. The first call that I booked with a guy who reached out to me through LinkedIn was because he sent a video and the video was personalized, and it was actually relevant, obviously relevant. You're only relevant if you target a narrow ICP. It's absolutely crucial to target a narrow audience because then you're more relevant to the people and have more success on LinkedIn.

Also, on LinkedIn, I wouldn't do a sequence like for cold email, and for a multichannel approach, I wouldn't put LinkedIn at the beginning and reach out by another LinkedIn message two or three days later. Everyone hates to get a LinkedIn connection and after two days receive a message. Instead, I would definitely recommend what we did on my team: we sent a connection request when we're researching people and put them into the cadence already that was like ten days earlier and then saw who accepted it, so we were sending messages much later. We also had LinkedIn messaging mostly at the very end of the sequence.

Obviously, on LinkedIn, if you start posting about stuff that concerns your ICP, after two three months, LinkedIn will become more effective than cold email because people see you every day and or every week. People are more likely to answer you on your messages because they see you. That's one thing, and the other thing is it's actually more important to comment on other people's posts that you want to reach out to rather than sending them a message because, there, reciprocity works well. If you comment on people's posts, they want to reciprocate, and so the likelihood increases that they will answer.

How did your cold outbound motion at Unique evolve over time, and what is your team doing today?

Over the last 2.5 years, we have had a lot of changes in terms of ICP and sales team. At the beginning we started in the SME section, like small tech companies, scale-ups and startups that we reached out to. Our ICP was head of sales in a tech/software startup.

We realized that this persona is incredibly busy and gets a lot of requests. Soon we realized that we have to be quite strategic about the outreach. So we did cadencing from the start, which means that people put in a cadence over 25 days with about 15 touchpoints. But still each seller had a rather individual approach, and I let people do what they preferred. Some were heavier on cold calling, some were heavier on LinkedIn, some emails. We realized over time that cold calling is the most effective. The most successful salespeople on my team were those who almost exclusively called, sending almost zero emails. They just called people every other day. So we shifted increasingly to cold calling

Then we switched the ICP to banking and insurance. The biggest change is, you go from 10,000 possible customers to 45 possible customers in Switzerland. We figured out which ones we wanted to tackle first. We didn't do much cadencing anymore. We just called where we found the number.

This meant we needed to make some changes to the team. We decreased the team a lot, and those who cold called heavily remained because they were the most successful. Then we just focused on calling until we got a meeting with all of them.

Bisho Chamssuddin



What, in your view, has changed in outbound over the last 5–10 years, and what has changed since last year?

The major changes I have seen during the last 5 years are, first, more data and easier access to data. There were not that many phone numbers readily available 10 years ago. There's much more automation now, many more tools. This **increased the quantity, so that obviously changed. Teams can push way higher quantities.**

Another big change during the last 5 years, in my view, is that there's way more people doing email prospecting now. It's incredible. What hasn't changed is there's still not a lot of people doing cold calls in Germany and Switzerland, which really surprised me.

Now, during the last year, I started to see people using AI a lot to create email and LinkedIn messages and also just to optimize their LinkedIn profiles. Also, even with cold calls, the connection rate got a bit worse this year. Obviously, with email and LinkedIn, I am seeing drops as well. This is probably not only related to more better-quality outreach but also due to the economic downturn.

What do you recommend your clients do to compensate?

Well, firstly, outbound alone works only for specific cases. For some products and services you need to generate demand, educate the market, and simultaneously start cold outbound. Especially in an economic downturn, your conversion drops and you have to educate new buyers.

Typically, 3% of the buyers are ready to buy, and 6% are considering buying. You have to educate the next 30% as well, who are not 100% of the problem, but they have the problem.

What do you see still working reasonably well in 2024 in cold outbound?

Maybe I'm biased, but just cold-calling never dies—as long as there's data, as long as there's a phone, as long as there's a number you can call. If you know how to hold a conversation on the phone along with cold calling principles—you say the right things with the right tonality, the right feeling, and the right structure—you can always book meetings with a cold call.

Also, LinkedIn, I think, is a goldmine. If people know how to use it. Most people still use it as an email provider and send messages that look like emails and wonder why have a 2% reply rate. It's not supposed to be like that.

A lot of people say that today you have to create content to be successful on LinkedIn. I don't think it's that black and white. I have known people who are successful on LinkedIn without creating content, but just by writing the right message. There's even data showing that voice messages and videos on LinkedIn have very high reply rates.

What is the right tonality on LinkedIn & social in general?

You want to approach it in a way like you're texting on WhatsApp and not writing emails back and forth. That's kind of the mindset. The first message should have the purpose of getting a reply and not booking a meeting or pitching.

Do not pitch. Do not ask for a meeting in the first message. You either ask a qualifying question to start a conversation or ask a question that is easy to answer just to get a reply.

But once you get a reply, you kind of break the ice, and then you can have a conversation with the person.

Another way of doing this, which I really love, is sending a voice message with a problem pitch:

I see you're leading the sales team at company x. From my experience I know that sales leaders usually don't have enough time to focus on coaching the reps when it comes to prospecting and cold outreach. And this leads to a lot of teams getting to a point where results are either not improving or are improving really slowly. Does that sound familiar to you, or am I off?

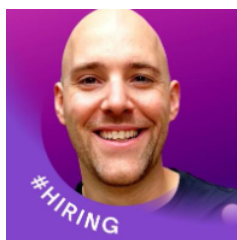
I don't say I'm a coach. I don't say what I do. I don't say what my coaching looks like. I just say, "Hey, this is my hypothesis about you because I know this from talking to other people. How is it for you?"

This is a very different approach because it's very customer centric. As you said before, it's all about relevancy. We've talked about this. It's all about being relevant. They don't care what the solution is. Nobody cares what the product is. All they care about is whether you understand them. So that's the first question I ask, and that's something that works well on LinkedIn right now.

What else do you see in 2024 in terms of cold outbound conversions?

Misalignment between different levels within a sales organization and the way they set goals. This is something I've been struggling with lately with a lot of clients I'm working with. They receive top-down from revenue goals, from investors. Often the underlying conversion is just fictional or based on inbound conversions. I believe in a mix of top-down and bottom-up approach. Obviously you need to set ambitious but achievable goals for the top performers. AND figuring out outbound almost always happens bottom-up.

Moritz Aemisegger



How do you think cold outreach changed over the last five years and over the last one year?

I don't know if I would answer it significantly differently for 1 year versus 5 years. I think, generally speaking, more and more technology has been introduced over the last five years. The last year is just an evolution of the technology that we've seen over the last 5 years. I think some of the technologies that have made a significant impact on cold outreach are sequencers—the Outreaches, Saleslofts, Apollos, and Smartleads of the world—which, basically allow one human being to easily send a lot of cold outreach emails.

This was previously not possible or not as easily possible. I mean, cold email at scale is something that has existed a long, long time. But now it has become significantly easier. On the other side, when we talk about LinkedIn, there are similar tools, like Expandi and Dripify, that now suddenly allow you to basically prospect while you sleep.

Then on the cold calling front, you have power dialers, parallel assisted dialers, and AI-fueled predictive dialers, right? There are all these dialers where you can basically log into a system and you are supercharged.

On the buyer side what has changed is that organizations and individuals have become more resistant to cold outreach.

Some channels are completely overpowered. For example, LinkedIn has become overcrowded to the point where they have introduced a primary and other inbox. I always joke that the best place to hide a dead body is in the LinkedIn other inbox because no one ever checks that one.

On the email front, the spam filters have gotten better and better. Last year, there was this big change by Google, which is not affecting B2B emailing, but it's just a question of time when that will come as well.

On the cold calling front, I am hearing more and more questions, "Such as, is this your first contact with Mr. Lucy? In that case, I have to kindly ask you to send him an email or send an email to info@. I'm not allowed to pass you through. Those are **our official regulations.**" Like five years ago, I almost never heard that sentence.

It's somewhat of an arms race.

How can you still be successful in 2024 in cold outreach?

By quality outreach and doing what not everybody else is doing.

Again, one of the things that we've seen that still works extremely well is cold calling because a lot of these tools and softwares that kind of became popular over the last years basically led to what one person has referred to as the "silent sales floor."

So imagine this: it's like a room of young sales development representatives, 20–25 years old, and all they do all day is send emails and LinkedIn messages. No one's on the phone. With our clients, when you cold call them, they highly appreciate it.

They actually thank you for calling them because it is not what everybody else is doing. Obviously you have to do it with a little bit of humor and be prepared and actually know what you're doing. But it's very easy to stand out from the rest if you're not doing it.

Send hand-signed letters to companies. And at that time I thought, "Who still reads letters?" But, for example, maybe your company offers a service that would look very good on a piece of paper, right? My favorite example, that I still believe is just a beautiful example of this, is if you sell a digital signature service, e-sign. You can send a hand-signed letter, and that letter will have coffee stains, orange juice, or whatever you want on it. It should be crumpled, and you should miss information on purpose. For example, it may have a date field, but you don't fill in the date field. Then you basically send that as a physical letter to people in HR.

Basically, you use that as a disruptor or a different way to reach out to them, showcasing why your service might be the better alternative. So sales has a lot to do with being creative, especially in 2024

How can you be creative on email and LinkedIn? What is still working there?

The immediate thing that comes to mind is video. As weird as that may sound, sending videos is still underused, as are voice messages on LinkedIn. I don't know how long they have had this functionality, but I think it's been quite a while, certainly a few years. And still from time to time, I see someone replying and saying, "Wow, this is a very innovative way for reaching out!" We just recently had a client where someone replied, "Wow, I've never seen this in Europe!" with being creative, especially in 2024

What other thought do you have on cold outreach?

Don't try to sell a hamburger to a vegan. I think that's something I also learned the hard way. I see a lot of pitches or a lot of outreach where the homework is not done. For example, I get offered web design development services or app development services almost on a weekly basis. Why would I need those services? It just shows very bad research and very bad targeting, which I think in the end is crucial.

Outro

Even though we covered quite a lot of ground in this handbook, the key to B2B outbound success still lies in practicing, experimenting, adapting, and learning. The space is evolving quickly, and what works today may not work in a year or two.

My 3 high-level key takeaways in the last years on this journey are as follows:

- Stay curious, courageous, and creative.
- Nail or validate your ICP and messaging.
- Relevancy trumps personalization by far.

I sincerely hope you can implement part of this handbook in your cold outreach activities and cut your learning curve. Also check out the annex with further resources, thought leaders, and references to deepen some points.

Got feedback/questions or want to engage with me or SalesPlaybook?

Email: florian@thesalesplaybook.io

LinkedIn: <https://www.linkedin.com/in/flolussi/>

Coffee Chat: <https://calendly.com/flussi/coffee-chat-with-florian>

Some important topics did not make the publishing deadline of the first version of this handbook, such as such as reply handling, inbound-led outbound, cold-calling deep-dive, CRM integration and automation, multi-channel, and a few other topics. However, the best-practice white papers for these topics are already in production. Subscribe to our newsletter to receive updates and our practical white papers: <https://www.thesalesplaybook.com/>. (Scroll to the bottom to sign up.)

About the Author



Florian is COO aka minister of Inner Affairs, covering areas such as people, finance, and reporting but also client sparring and implementation of lead gen engines, case studies engines, social selling and AI in sales.

Other than that, hit Florian up on chess improvement and agency operations.

About SalesPlaybook



SalesPlaybook is a B2B sales implementation, training, and operations boutique working with B2B entrepreneurs in DACH to build and scale sales quickly.

We are helping entrepreneurs realize their full revenue potential without trial and error by implementation, training, and operations in these 3 areas:

- **Generating a qualified pipeline:** Building inbound-led outbound engines.
- **Closing bigger deals faster:** Deal sparring and B2B sales training.
- **Scaling sales efficiently:** CRM implementation and sparring, and tooling

SalesPlaybook Track Record

Generate Qualified Pipeline x Lead Gen

- **Boostbar:** 0-10 Mio. ARR with implementing HubSpot, building outbound email, and hit product-market fit in <3 years
- **Kyan:** 0-7 figure ARR by building lead gen, sales capabilities, and processes in <12 months
- **b2match:** Source and close biggest deal from outbound sales from 0 to won in 9-year company history in <4 months
- **Airica:** From <10 projects to building outbound sales from 0 to 50+ subscriptions to exit in <12 months
- **Archlet:** 0-7 figure ARR by nailing their ICP + building outbound from 0 in <18 months
- **TAP:** 2x qualified pipeline generated in <5 months
- **Jua:** Booking calls with decision-makers instead of analysts in <4 months

Close Bigger Deals Faster x 1:1 Sales Coaching

- **Vulcavo:** Went from EUR 5k ARR ACV to close a EUR 180k, 5-year contract at 4x higher sales velocity in <9 months
- **Classtime:** >8x ARR by increasing deal size 10–50x and building up outbound sales in <3 years
- **Linimex:** Closed a 250k ARR deal in <6 months
- **FTAPI:** +70% ARR growth to hit EUR 10 Mio. ARR in <12 months
- **deskbird:** New AE hitting 153% quota in first quarter by closing 40 deals while saving >10 hours/week for head of sales in <3 months
- **Nexoya:** 3x ARR from 6 to 7 figures to close Series A
- **Beekeeper:** 5 new sales reps ramped while saving 10 hours per month for sales leader in <3 months
- **Turbit:** 5x MRR by professionalizing sales, including hiring approach, in <16 months
- **novoMOF:** 5- to 7-figure annual revenue by hitting message-market fit and closing a mid-6-figure deal in <3 years
- **56k.cloud:** 370k deal closed through hands-on support in <6 months
- **HRinstruments:** Directly usable sales coaching in <4 weeks

Scale Sales Efficiently x HubSpot and Sales Operations

- **Cito:** 175% net revenue retention at TOP 20 customers in <6 months
- **Skribble:** Double deal size and increase revenue per rep by transforming sales motion from inbound to outbound and more in <6 months
- **56k.Cloud:** 500k to 2 Mio. annual revenue in <3 years
- **Pricenow:** Professionalized sales to set up scale in <4 months
- **Houston and Ko:** 8x annual revenue bootstrapped in <3 years
- **rready:** 0-2M+ ARR by moving from founder-led to repeatable sales by ramping junior reps quickly in <18 months
- **Unique:** Scaled 0 to 7-figure ARR in <18 months
- **care4IT:** Closed 30k deal in <3 months with LinkedIn outbound + Video Sales Letters after 17 years and previous sales coaching
- **kollabo:** Brought sales structure to the next level in <6 months

Annex

1 Thought Leaders and References

I'd love to give the following thought leaders credit. Over the years, I made use of their insights and learnings to cut my own learning curve. Note, rather than reinventing the wheel, in many sections of this handbook, I was using their words, especially if they've already nailed it.

Again, I try to give credit where credit is due. However, this is not an academic publication.

- **Moritz Aemisegger:** Reality Check cold outreach.
- **Bisho Chamssuddin:** Reality Check cold outreach.
- **Martin Giese:** Market segmentation and ICP.
- **Eric Nowoslawski:** Cold email messaging, outbound framework, databases, workflows, automations.
- **Jesse Ouellette:** Email deliverability.
- **Ryan Reisert:** General thoughts on outbound sales.
- **Alan Ruchtein:** General thoughts on outbound sales.
- **Patrick Trümpi:** Reality Check cold outreach and outbound framework.
- **Vovik Tsybulskyi:** Cold email sending options.

2 Further SalesPlaybook Resources

B2B Strategic

- **Outbound Process Thesis:** thesalesplaybook.com/out-process
- **Outbound Framework:** thesalesplaybook.com/out-framework
- **Inbound-Led Outbound Framework:** thesalesplaybook.com/out-inframework
- **ICP and Buyer Persona Templates:** thesalesplaybook.com/out-icp

B2B Tactical

- **Copy and Script Templates:** thesalesplaybook.com/out-templates
- **Lead Magnet Guide:** thesalesplaybook.com/out-leadmagnet
- **Virtual Event Guide:** thesalesplaybook.com/out-event

3 Common Data Workflows

1. Recent fundraise via Owler, Apollo, Harmonic
 - A. Use this as a filter, don't mention that they recently raised money.
2. Open jobs
 - A. Find current problems in the job posts that the company is looking to solve for. Also, use for intent that they are growing.
3. Recent new hire
 - A. Great for targeting people that just got into a role and need to change things up.
4. Tech on site
5. Local business prospecting total strategy
 - A. Goes over how to find as many actual owner names as possible and what to do when you don't have the owner's name and have to email the support@localbusiness.com email.
6. Clearbit campaign setup
 - A. Super-easy way to take advantage of Clearbit data
7. Sending creative ideas of how someone can take advantage of your product or service in their business
8. Recent company news campaign
9. Keywords on site that make the company a great target
 - A. If you are ever hiring people to check
10. Targeting people that have never held a position before
11. Employee headcount growth increase
12. Targeting competitors' clients (often with technographic data)
13. Targeting companies using complementary technologies that you integrate with
14. Targeting people that used to work at your customers' business and moved to new jobs
15. Shared investors (use Owler/Harmonic/Crunchbase)
16. Companies with no dedicated team members for task
17. Targeting LinkedIn group members
18. Targeting LinkedIn event attendees
19. Targeting LinkedIn post engagers
20. Lookalike company targeting based on best-case studies
21. Testing multiple angles and stacking them in one campaign setup for easy use

Source: *Eric Nowoslawski*