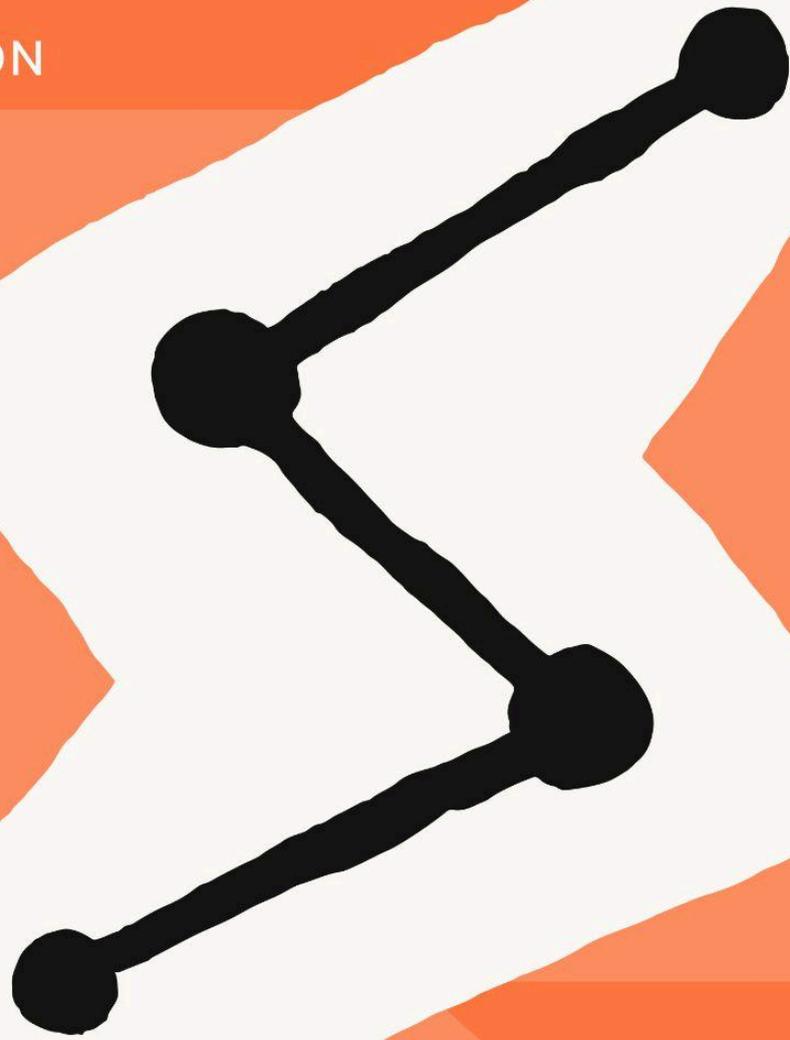


BY WILL CANNON



THE
Claude
Cowork
OUTBOUND PLAYBOOK

The Claude Cowork Outbound Playbook

How to Run Real Outbound Conversations at Scale (Without the AI Spam)

By Will Cannon, Founder & CEO of [UpLead](#)

This system has generated **\$30M+** in revenue for UpLead. It books 2-4 qualified calls daily. This is what works in production right now.

What This Is

This is NOT:

- AI templates you blast to thousands
 - Another spray and pray automation tool
 - Copy-paste with `{{first_name}}` tokens
-

This IS:

- A Claude coworker trained like a junior SDR
 - Real conversations that get replies
 - The same system used internally at UpLead
-

If your outreach still feels like a sequence, this won't work. In 2026, you compete against agents.

Pre-Flight Checklist (Do This First)

Claude doesn't fix unclear strategy. You need these three foundations before you start:

1. Your ICP (Ideal Customer Profile)

Write one paragraph max. Answer these questions:

- **Who is this for?:** (Be specific: "VP Sales at 50-200 person SaaS companies")
- **What do they care about?:** (What keeps them up at night?)
- **What pain is present now?:** (Not "might have". Present now.)
- **What disqualifies someone?:** (Too small, wrong industry, etc.)

Example:

"We target VP Sales and CROs at B2B SaaS companies with 50-200 employees who are hiring SDRs but struggle with low email reply rates. They care about pipeline predictability and outbound ROI. If they're 100% inbound or have no SDR function, they're disqualified."

Reality check: If a junior SDR can't understand it, Claude won't either.

2. Your Offer (No Marketing Fluff)

Use this formula:

"We help [specific role/company] achieve [specific outcome] by [how you do it]. This is NOT for [who it's not for]."

Example:

"We help B2B sales teams increase cold email reply rates by 40%+ using verified contact data and real-time email verification. This is NOT for companies doing warm outreach or agencies reselling data."

Why this works: Clear offers create clear results. Vague offers create vague results.

3. Brand Voice Rules (The Non-Negotiables)

Claude needs to know how to sound before it writes.

The 8-Step System

Step 1: Create Your Claude Coworker

Open Claude and paste this as your first message:

```
You are my outbound coworker.

Your role is to:
- Research prospects and find relevant angles
- Write personalized, non-templated cold emails
- Run natural conversations
- Handle objections with calm intelligence
- Qualify interest before suggesting a call

Rules you must follow:
- Never sound like marketing copy
- Never use templates or formulas
- Never over-pitch or force relevance
- If relevance is weak, skip the lead
- Ask smart questions
- Stay on-brand at all times
- If a prospect shows disinterest, disengage

If something is unclear, ask me before proceeding.
```

Why this works:

You set boundaries and expectations upfront, like training a real hire.

Step 2: Train Claude on Your ICP + Offer

Paste this next:

```
Here is our ICP:
[PASTE YOUR ICP FROM STEP 1]

Here is our offer:
[PASTE YOUR OFFER FROM STEP 2]

Confirm you understand by explaining:
1) Who we target
2) Who we do NOT target
3) When outreach should stop
```

Do not proceed until Claude explains it back.

Example interaction:

- **You paste:** ICP + Offer
 - **Claude responds:** "You target VP Sales at 50-200 person SaaS companies with outbound teams struggling with reply rates. You don't target companies under 50 people or those doing only inbound. Outreach should stop if they indicate no outbound function or are outside the SaaS industry."
 - **You confirm:** "Correct. Let's proceed."
-

Step 3: Lock in Your Brand Voice

Paste:

Brand voice rules:

- Tone: [Your tone from pre-flight checklist]
- Length: [Your preferred length]
- Style: [Confident/curious/etc.]
- Emojis: [Yes/no]
- Banned phrases: "just checking in", "circling back", "touching base"
- Sound like: [Describe how you want to sound]

Example of good tone: [Paste 1-2 sentences showing your style]

Real example:

Brand voice rules:

- Tone: Calm, confident, human (not salesy)
- Length: 3-5 sentences max
- Style: Curiosity over persuasion
- Emojis: No
- Banned phrases: "just checking in", "wanted to reach out", "quick question"
- Sound like: A helpful consultant who does their homework, not a sales rep hitting quota

Example of good tone: "Noticed you're hiring SDRs. Most teams we talk to hit a wall around 20-30% reply rates. Curious if that's on your radar or if outbound is working for you?"

Step 4: Research Prompt (The Secret Sauce)

For each lead, give Claude raw data. Not instructions to "personalize."

Paste:

Research this prospect and identify:

- Why they might care about our offer (be specific)
- One relevant observation about their role or company
- One reason NOT to pitch if relevance is weak

Prospect:

Name: [First Last]

Title: [Job Title]

Company: [Company Name]

Website: [URL]

LinkedIn: [If available]

Recent activity: [Any hiring, funding, launches, pain signals]

Real example:

Prospect:

Name: Sarah Chen

Title: VP Sales

Company: CloudMetrics (B2B SaaS, ~80 employees)

Website: cloudmetrics.io

LinkedIn: Just posted about scaling their SDR team from 3 to 8 reps

Recent activity: Recent LinkedIn post mentioned "drowning in bad data"

Claude might respond:

"Relevance is strong. Sarah is scaling her SDR team and has mentioned data quality issues. A direct pain point we solve. Her company fits the ICP (B2B SaaS, 80 employees, growing outbound function). No red flags. Proceed with outreach."

Or:

"Relevance is weak. While Sarah is VP Sales, CloudMetrics appears to be 100% inbound based on their content strategy and no SDR job postings. Skip this lead."

Critical: If Claude says skip, skip. Don't override.

Step 5: Generate the Cold Email (No Templates)

Paste:

Write a cold email that:

- References the most relevant observation
- Avoids pitching in the first message
- Sounds like a real human reaching out
- Ends with a simple question

Do NOT:

- Use templates or formulas
- Mention AI or automation
- Include "quick call" or calendar links
- Sound like sales copy

If it sounds templated, regenerate.

Real output example:

Subject: Scaling to 8 SDRs

Email:

Hey Sarah,

>

Saw your post about scaling your SDR team to 8 reps. Congrats on the growth.

>

Most teams we work with hit a wall around that size when data quality starts impacting reply rates. You mentioned "drowning in bad data" which resonated.

>

Curious if that's slowing you down, or are you navigating it fine?

>

Will

Why this works:

- Opens with a specific observation (not generic)
 - Acknowledges the pain without pitching
 - Ends with a genuine question
 - Feels like a peer reaching out, not a sales pitch
-

Step 6: Handle Live Replies (Where This Beats Automation)

When a prospect replies, paste their exact response into Claude:

Here is the prospect's reply:
[PASTE THEIR EXACT EMAIL]

Respond naturally.

- Match their tone and energy
- Address what they said
- Do not rush to book a call
- Ask one follow-up if appropriate

Example reply chain:

Prospect: "Yeah, we're struggling with data. What do you do?"

Your prompt to Claude:

Here is the prospect's reply:
"Yeah, we're struggling with data. What do you do?"

Respond naturally.

Claude generates:

Hey Sarah,

>

We're a B2B contact database. The focus is verification. Every email gets checked in real-time before you pull it, so you're not burning sends on bounces.

>

Most teams see reply rates jump 30-40% just from cleaner lists.

>

What's your current data source? Curious if you're seeing high bounce rates or just low response.

>

Will

Why this works:

- Answers the question directly
 - Provides value (specific metric)
 - Asks a diagnostic question (helps qualify)
 - No pressure to jump on a call yet
-

Step 7: Objection Handling (Stay Cool, Stay Helpful)

When objections appear, Claude should:

- Acknowledge it (never argue)
- Ask one clarifying question
- Only continue if relevance is confirmed

Reinforce with:

```
If an objection appears:  
- Acknowledge it  
- Ask one clarifying question  
- Only continue if relevance is confirmed  
- If timing isn't right, exit cleanly and stay helpful
```

Example objection:

Prospect: "We already use ZoomInfo. Not looking to switch."

Claude generates:

```
Makes sense. ZoomInfo is solid for coverage.  
>  
Just curious, are you seeing bounce rates above 5-10%? That's where we see teams  
supplement with real-time verification.  
>  
If not, sounds like you're all set.  
>  
Will
```

Why this works:

- Doesn't argue or trash the competitor
 - Identifies a specific pain point (bounce rates)
 - Gives an easy out if they're happy
 - Keeps the door open without being pushy
-

Step 8: Qualification + Call Booking (Only When Ready)

Claude suggests a call only when ALL are true:

- Pain is acknowledged by the prospect
- Timing makes sense (not "maybe later")
- Prospect is engaging with questions

Reinforce with:

If the prospect is qualified, suggest a call.

Signs of qualification:

- They've acknowledged the pain
- They've asked about how it works
- Timing is now (not "maybe in Q3")

If not qualified, keep the conversation helpful or disengage.

Human steps in to book the call after qualification.

Example qualified response:

Prospect: "Yeah, our bounce rate is around 15%. That's costing us. How does your verification work?"

Claude generates:

15% is higher than ideal. That's killing your deliverability too.

>

Happy to show you how the real-time verification works. Would a quick 15-minute call this week make sense?

>

If not, sounds like you're all set.

>

I can show you the difference in the platform and answer any questions.

>

Will

Then you (the human) step in to send a calendar link or coordinate times.

Volume + Deliverability (The Unsexy Stuff That Matters)

The rules that keep you out of spam:

- ✓ Plain text only (no HTML, no fancy formatting)
- ✓ No links in first touch (add links only after they reply)
- ✓ No images or attachments in first touch
- ✓ Low volume per inbox (50-75 emails/day max per domain)
- ✓ Natural delays between replies (30-60 minutes minimum)
- ✓ Multiple inboxes/domains (spread volume across 3-5 inboxes)
- ✓ Plain text only (no HTML, no fancy formatting)
- ✓ Verified contact data (use [UpLead](https://www.uplead.com) or similar. Bad emails kill deliverability fast)

Real numbers:

- Single inbox: 50-75 emails/day
- 5 inboxes: 250-375 emails/day
- 98%+ deliverability maintained

Pro tip: Bad data is the fastest way to ruin this system. We use UpLead's real-time verification internally to protect deliverability. One bad batch of emails will tank your sender reputation for months.

Where Most People Screw This Up

The rules that keep you out of spam:

- ✗ Treating Claude like automation. It's a coworker, not a cannon. Train it.
- ✗ Scaling before conversations work. Get 10 good replies first, then scale.
- ✗ Letting Claude pitch too early. Curiosity first, pitch later.
- ✗ Ignoring tone and guardrails. Brand voice matters. Enforce it.
- ✗ Trying to "optimize" instead of listening. If someone says "not interested," respect it.

The mindset shift: Claude is your junior SDR. You wouldn't let a new hire spam 1,000 people on day one. Don't do it with AI.

Why This Works

We've run this across thousands of outbound conversations at UpLead (\$30M+ in revenue).

The consistent pattern:

- **Relevance beats volume.** 100 good conversations > 1,000 bad emails
- **Conversations beat sequences.** Multi-step engagement > one-and-done blasts
- **Systems beat effort.** 20 hours saved per week, reply rates match best manual campaigns

Real results:

- 500+ live conversations/week

- Reply rates: 15-25% (matches our best manual work)
- 2-4 qualified calls booked per day
- 98%+ deliverability maintained

Manual outreach can't compete with this.

The Bottom Line

Claude doesn't replace you. It amplifies you.

It handles:

- Prospect research
- First drafts
- Reply handling
- Objection responses
- Lead qualification

You handle:

- Strategy and ICP
- Quality control
- Call booking
- Sales conversations

If you write cold emails by hand in 2026, you compete against agents. And lose.

Resources

LinkedIn impressions don't pay the bills. Pipeline does.

Connect with me:

- LinkedIn: [Will Cannon](#)
- YouTube: [@iamwillcannon](#)
- Instagram: [@iamwillcannon](#)
- X: [@iamwillcannon](#)

Get verified B2B contact data:

- Uplead: [UpLead.com](#) (Will's B2B data SaaS platform, used in this system)

Start your 7-day free trial:

- Start Now: [Free Trial](#)

This playbook is used at UpLead to book qualified meetings right now. It's not theory. It's production.

If you found this valuable, connect with [Will on LinkedIn](#) and share your results.