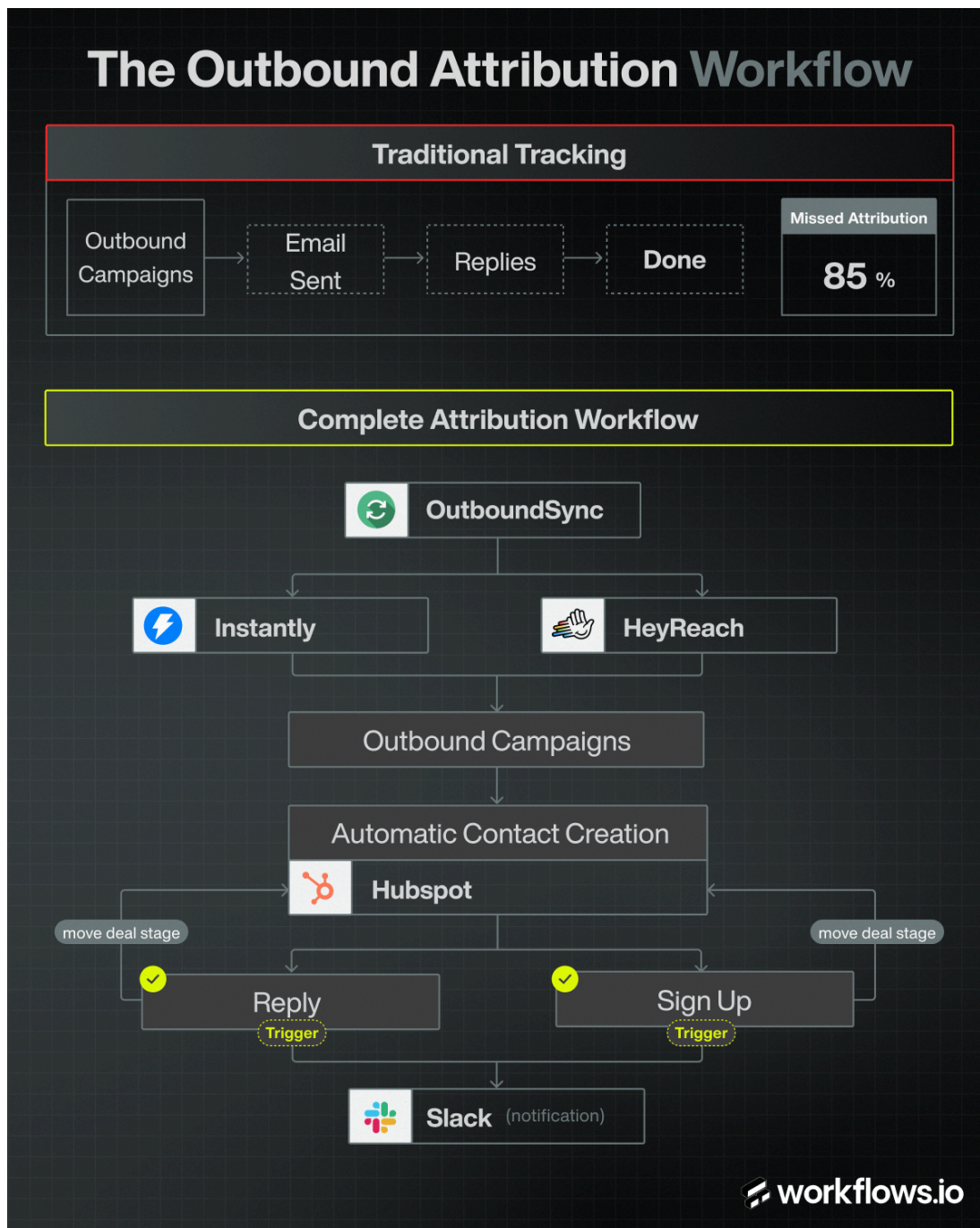# Outbound Attribution Playbook 2025

How it works?

Step 1: Connect OutboundSync to Outreach Tools

- Plug **Instantly** and **HeyReach** into **OutboundSync**
- Log every email, DM, and connection request into **HubSpot**
- Auto-create / update contacts the moment an outbound touch happens
- Remove dependency on replies for someone to "exist" in the CRM

Step 2: Create Two Core HubSpot Properties

- **Outbound Campaign** → "Was this contact/company touched by outbound?"
- **Sign Up** → "Did this contact/company sign up or convert?"
- Both are simple checkboxes for clean, binary logic
- Together, they become the **anchor for all outbound attribution**

Step 3: Auto-Tag Contacts and Companies

- When outbound fires, set **Outbound Campaign = TRUE** on the contact
- Mirror that tag at the **company level** for account-based view
- Store campaign metadata (which sequence, which channel, when)
- Build a complete picture of who outbound touched and when

Step 4: Track Signups and Tie Them Back to Outbound

- When someone signs up, flip **Sign Up = TRUE** automatically
- Trigger **Slack alerts**, task creation, or deal creation from that change
- Mark those as **Outbound Influenced Signups** in HubSpot
- Reveal conversions that would otherwise show as "Direct" or "Organic"

Step 5: Automate Deal Stages & Reporting

- Move deals through stages based on **real activity**, not manual updates
- Use stages like: Outbound Influenced → Signed Up → Activated → Closed Won
- Build dashboards for **Outbound → Signup → Revenue** flows
- Compare performance by channel: email vs LinkedIn vs mixed sequences

Step 6: Capture the "Hidden" Outbound Impact

- **Silent website conversions** → visits and signups after seeing your email
- **The LinkedIn effect** → profile views, content touches, brand familiarity
- **Off-channel conversations** → DMs, Slack, WhatsApp, communities
- **Brand familiarity** → multiple small touches compounding into one signup

- **Delayed conversions** → signups weeks after the original sequence

Step 7: Turn Outbound Into a Measurable Revenue Engine

- Shift from "reply rate" to **full-funnel influence** as the success metric
- Align outbound + marketing on the **same CRM truth**
- Show leadership outbound's **real contribution to pipeline and revenue**
- Use this model to scale outbound with confidence, not guesswork