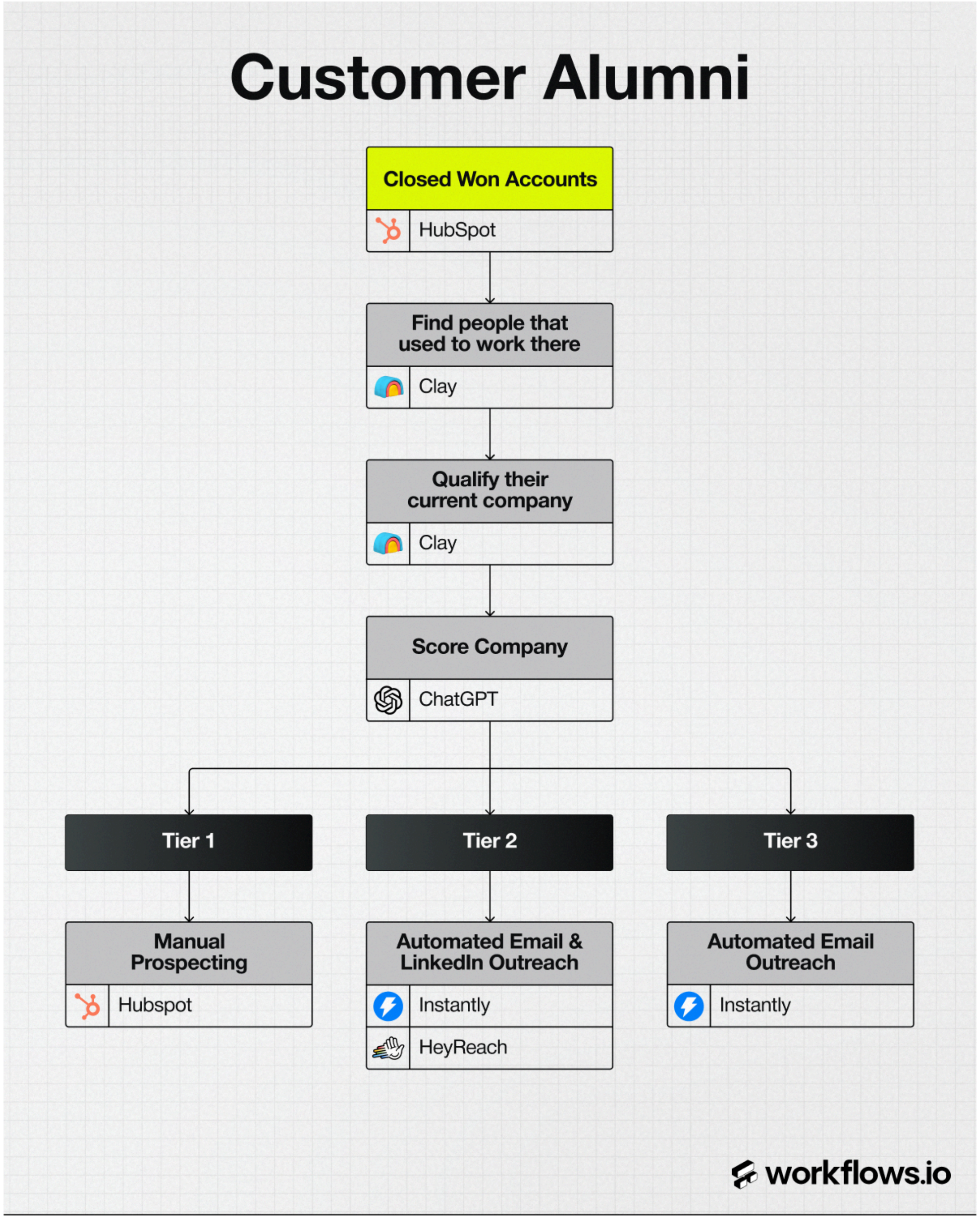
The "Customer Alumni" Play



How it works?

Step 1: Build the Customer Alumni Seed List

- Pull all high-ACV customers and accounts with published case studies.
- Create an Active List in the CRM containing these companies.
- Include Firmographics: company name, domain, ARR, vertical, use case.
- Push this seed list into Clay as the foundation for alumni discovery.

Step 2: Find Customer Alumni in Clay

Using Clay's people search:

1. Select "Include Past Companies"

2. Upload your seed list as the company filter

3. Pull everyone who previously worked at those customer accounts

4. Eliminate anyone who still works there (keep *only past employees*)

5. Filter for qualified titles (RevOps, GTM, Product, Data, Leadership, etc.)

6. Capture their:

- New company
- New role
- Seniority
- Job-change recency
- LinkedIn URL

Step 3: Qualify Their New Companies

- Enrich new companies using Clay.
- Pull industry, size, revenue, funding, and tech stack.
- Check ICP alignment with your defined Tier 1–3 model.
- Keep only high-fit (Tier 1–2) companies.
- Remove mismatched or non-ICP companies.

Step 4: Score Accounts for Routing

Assign points for simple fit parameters inside Clay, then total the score to determine the tier.

Example scoring rules:

- **Geo:** UK **+5**, EU **+3**, US **0**
- **Headcount:** 50–500 **+5**, 500–2000 **+3**, else **0**
- **Industry match:** ICP vertical **+5**, adjacent **+2**, non-ICP **0**
- **Funding:** Series A–C **+4**, Seed **+1**, late stage **+2**
- **Tech stack:** complementary **+3**, competitor **–3**

Tiering:

- **Tier 1:** 12+ points
- **Tier 2:** 6–11 points
- **Tier 3:** 0–5 points

Use this tier to route accounts into the correct outreach motion.

Step 5: Route to Tiered Outreach

- **Tier 1:** Human-led LinkedIn + email (HubSpot task assigned).
- **Tier 2:** Automated multichannel via Instantly + HeyReach.
- **Tier 3:** Automated nurture-only email drip.
- HubSpot workflows auto-sync contacts into the right cadence.