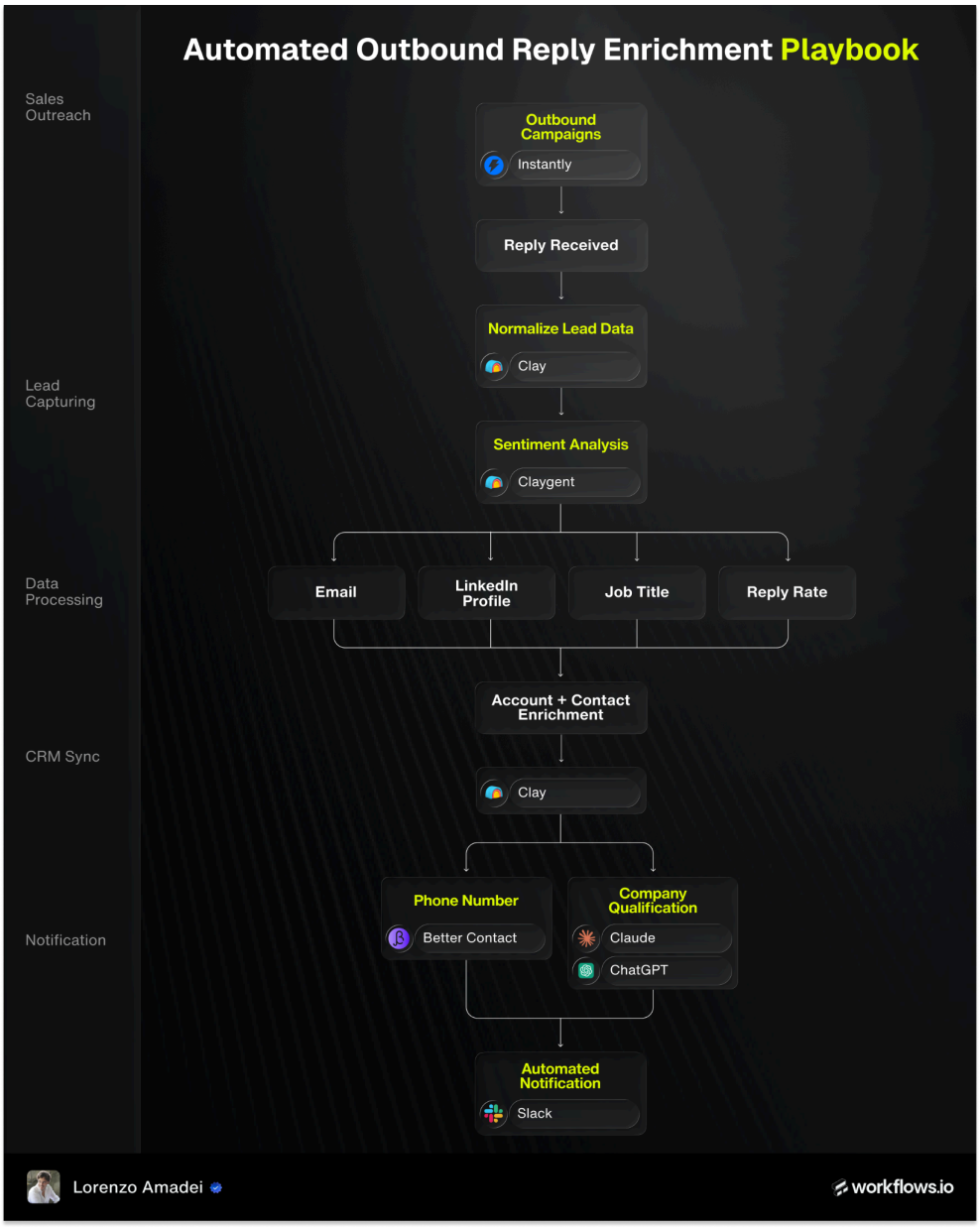
Automated Outbound Reply Enrichment Playbook



How it works?

Step 1: Capture qualified replies from automated outbound

Trigger the workflow when there is a reply via Instantly.

Step 2: Route replies into Clay

Centralize reply data before any processing.

- Create a webhook inside **Clay**.
- Connect the Instantly reply event to the webhook
- Send raw reply data into a Clay table:
    - Email address
    - LinkedIn profile URL
    - Job title
    - Full reply text
    - Campaign metadata

Step 3: Normalize lead data

Prepare data for enrichment and CRM sync.

Standardize:

- Email format
- LinkedIn profile URL
- Job title
- Reply text

This prevents enrichment errors and duplicate CRM records.

Step 4: Sentiment Analysis

Determine the status of each reply.

- Use **Claygent** to analyze the reply text.
- Classify replies as:
    - Interested
    - Neutral
    - Not interested
    - Out of office or auto-reply

Step 5: Enrich contact data

Fill in missing context for follow-up. Using Clay, enrich for:

- Phone number via BetterContact
- Company funding details
- LinkedIn profile data

Step 6: Sync contact to HubSpot

- Look up for contact in HubSpot using email
- If contact exists:
    - Update missing or outdated fields
    - Append enriched data
- If contact does not exist:
    - Create a new contact
    - Add enriched fields
    - Set lead status to **Interested**

Step 7: Notify and monitor in Slack

Send alerts to a dedicated Slack channel

- Include:
    - Reply text
    - Enriched contact details

    - Phone number

Use these notifications to:

- Alert reps to secure meetings and pre-qualify leads
- Spot patterns in buyer responses