
Niche TAM Mapping and CRM Automation Playbook

Workflow: <https://drive.google.com/file/d/1o2hxRFyogqN98BMiyjmitLP6IXdzxf9u/view?usp=sharing>

How it works?

Step 1: Identify lookalike companies

Start by expanding the initial ICP.

- Identify companies similar to the ICP.
- Use multiple sources to maximize coverage.
- Tools to use:
 - DiscoLike
 - AI Ark
 - Clay
 - [Ocean.io](https://ocean.io)

Step 2: Route and standardize company data

Centralize all sources into a single system.

- Create one table in Clay.
- Aggregate results from all tools into this table.
- Dedupe records to remove overlaps.
- Standardize fields by creating standard columns:
 - Company Name
 - Domain
 - Description
 - Company LinkedIn Profile

Step 3: AI Qualification

Filter the list down to relevant accounts.

- Use the '**Use AI**' feature in Clay.
- Select any ChatGPT model (ChatGPT 4o mini recommended).
- Prompt the model to classify companies as:
 - Qualified
 - Not qualified
- Remove not qualified companies from the table

Step 4: Lead Scoring

Segment companies by quality.

- Use Clay formulas to assign a score.
- Assign tiering logic based on the score:
 - **Tier 1:** Best fit
 - **Tier 2:** Good fit
 - **Tier 3:** Low fit

Step 5: Source Contacts

Identify the right contacts inside qualified companies.

- Define target personas:
 - Example: CEO, VP of Sales, Head of Growth
- Use multiple tools for maximum coverage:
 - AI Ark
 - [Ocean.io](https://ocean.io)
 - Apollo
 - Clay

Step 6: Enrich Contact Data

Add context required for outreach.

- Enrich each contact with:
 - LinkedIn profile
 - Work email address

- Any additional relevant firmographic or role data

Step 7: Run personalized outreach for Tier 1 contacts

Apply personalisation to the best-fit accounts.

- Research Tier 1 contacts using:
 - Warm connection discovery via **The Swarm**
 - Custom decks and presentations via **Gamma**
 - Personalized landing pages or microsites via **HubSpot**
- Use these information in:
 - Manual cold calling
 - LinkedIn outreach via **HeyReach**

Step 8: Run scaled outreach for Tier 2 & 3

Handle remaining leads using:

- Automated email campaigns via **Instantly**
- Lighter personalization based on enriched fields.

Step 9: Update CRM automatically

Keep CRM data clean and synchronized:

- Create an automation in HubSpot.
- Logic:
 - If a deal already exists:
 - Associate the contact and message reply with the existing deal
 - If no deal exists:
 - Create a new deal
 - Associate the contact with it

Step 10: Monitor results and optimize

Set up **Slack** notifications for replies.

- Use insights to:
 - Refine AI qualification logic
 - Adjust tiering criteria
 - Improve future TAM and lookalike builds