Outbound Playbook 2026

Workflow Link: 📄 Outbound Playbook 2026.jpg

How it works?

Step 1: Create ICP Model

Define targeting framework before sourcing accounts. Identify:

- **Firmographics**
  - Industry
  - Headcount
  - Revenue
  - Geography
- **Technographics**
  - Tech stack
  - Tools used
  - Infrastructure signals
- **Account-fit signals**
  - Hiring activity
  - Funding stage
  - Website traffic
  - Engagement signals

Step 2: Define Campaign Strategy

Select campaign structure based on goal.

- Volume-Based Campaigns
  - Segment by:
    - Industry
    - Headcount
  - Target broad ICP segments.
- Micro Campaigns
  - Narrow targeting by:
    - Sub-vertical
    - Specific job titles
    - Specific pain points

- Signal-Based Campaigns
  - Target accounts with active buying signals:
    - ABM list
    - Website visitors
    - Event attendees
    - Ad engagement

Step 3: Source and Enrich Accounts

Build account list from multiple sources.

- Databases
  - Apollo
  - AI Ark
  - Ocean.io
  - Discolike
  - Sales Navigator
  - Store Leads
- Scraping
  - Apify
  - Octoparse
  - Serper.dev
  - Python
- Signals
  - Clay
  - RB2B
  - Jungler
  - Fibbler
  - Sumble
  - TheirStack

Aggregate into Clay and:

- Perform data enrichment.
- Normalize company fields.
- Run qualification logic in Clay.
- Remove non-qualified accounts.

Step 4: Source and Segment Contacts

Pull contacts from qualified accounts.

- Categorize contacts into:
    - Decision Maker
    - Champion
    - User

Step 5: Build Copy and Personalization

Structure outbound messaging.

Include:

- Positioning
- Offer
- Personalization layer
- Create multiple variants and run A/B test

Step 6: Launch Outreach

Deploy multi-channel outreach.

- Email Outreach via Instantly
    - Configure sending infrastructure
    - Apply daily sending limits
- LinkedIn Outreach via HeyReach
    - Configure DM limits
- Log activity into CRM and update:
    - Contact records
    - Deal stages
    - Reply status

Send Slack notification when:

- Reply received
- Include:
    - Contact name
    - Company
    - Campaign

- Reply text

Step 7: Reporting

Track performance across:

- Reply rate
- Positive reply rate
- Meetings booked
- Pipeline created

Review campaign performance weekly and adjust:

- Targeting
- Copy
- Segmentation
- Signal filters