

Outbound Reply Signal Playbook

Playbook Visual Link: 

How it works?

Step 1: Capture outbound replies

Track replies generated from outbound email campaigns.

- Detect replies from **email sequences**.
- Use **Instantly** to capture reply events.
- Route reply data to **Clay** using a webhook.

Step 2: Lookup contact in CRM

Identify whether the contact already exists.

- Perform **contact lookup in HubSpot**.
- Use the **email address** to locate the record.
- Retrieve the **associated contact owner**.

Step 3: Extract and prepare reply data

Enrich the reply content for analysis.

- Pull the **reply email body** via **Instantly** webhook
- Standardize the reply body inside **Clay**

Step 4: Run sentiment analysis

Evaluate the tone of the reply.

- Use **Clay AI** to analyze the email response.

- Classify the reply sentiment as:
 - Positive
 - Negative

Step 5: Handle negative replies

Log and update negative responses.

- Update the **contact record in HubSpot**.
- Log the reply outcome for reporting.

Step 6: Enrich contact data for positive replies

Enrich the leads for follow-up.

- Enrich **phone number** via **BetterContact**.
- Update the contact record in **HubSpot**.

Step 7: Verify contact ownership

Ensure the lead is routed correctly.

- Check whether the contact already has an **assigned owner**.
- If an owner exists:
 - Continue to notification.
- If no owner exists:
 - Assign a **new owner**.

Step 8: Notify the sales rep

Alert the responsible rep for follow-up.

- Send a **Slack notification** to the owner.
- Include:
 - Contact name
 - Company
 - Reply message
 - Phone number