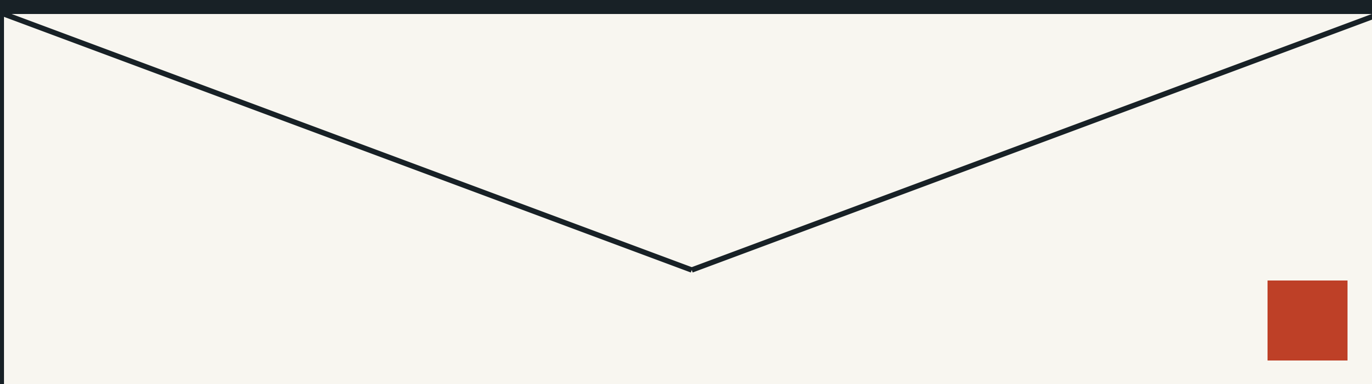
THE FIELD MANUAL SERIES

The Outbound Playbook

Choose better accounts. Write with a reason. Build qualified conversations.



RELEVANCE

CONVERSATION

QUALIFIED NEXT STEP

22 email templates / Channel workflows / Measurable experiments

RESEARCH EDITION / 2026

38 PAGES

READ / CALCULATE / DECIDE

Inside this playbook

READ / CALCULATE / DECIDE

Tools for the decision

FIELD GUIDE / START HERE

Build a system you can learn from

Outbound begins with a hypothesis: a particular person at a particular organization may have a problem your company can help address. Your first job is to test that hypothesis respectfully. Your second is to learn from the result without confusing activity with progress.

This book is for SDRs, BDRs and AEs prospecting for B2B technology products. It covers account selection, research, email, LinkedIn, phone, video, sequence design, reply handling and measurement. The template library contains 22 original email starting points, each with a specific use case.

The operating loop

Choose a narrow audience. Identify a plausible business issue. Write one relevant message. Use approved channels. Record the response and the resulting meeting quality. Change the part of the system that the evidence points to.

What you will build

An account brief, a short sequence with stopping rules, a message experiment and a weekly outcome review. The worksheets at the end help you repeat the process without turning every send into a new improvisation.

> All companies, people, figures and scenarios in this book are fictional teaching examples. Cadences and scripts are starting experiments, not universal best practices or guaranteed conversion methods.

US B2B scope; research checked September 2026. Applicable laws, provider policies and employer requirements still depend on the recipients, location and tools. The source notes distinguish those requirements from this book's original operating recommendations.

01 / CHOOSE WHERE TO FOCUS

Define the account before finding the contact

An account list should reflect a reason your product might matter. A large collection of company names is not a strategy. Start with a use case, the conditions under which it appears and the constraints that could rule an account out.

A fictional account hypothesis

SignalPath sells a workflow product. The initial audience is service businesses with several teams involved in customer onboarding. The working hypothesis is that missing handoff information creates avoidable chasing. That remains a hypothesis until buyers confirm it.

Selection factor	What to look for
Relevant workflow	Evidence the account performs the work you support
Complexity	A plausible reason the existing process becomes difficult
Trigger	A recent event that makes a conversation timely
Compatibility	Known product, geography or implementation constraints
Exclusion	A clear reason the product would not fit

Start narrow enough to compare

If your first batch mixes small agencies, global manufacturers and software companies, their different buying contexts may obscure what the messages teach you. Use a coherent segment and document the selection logic.

Avoid the false shortcut

Funding, hiring or growth is not proof of a problem or available budget. Use a public signal to form a question, not to announce what is happening inside the organization.

> Account statement: "This organization may fit because [observable condition]. I still need to verify [important uncertainty]."

01 / CHOOSE WHERE TO FOCUS

Prioritize with reasons you can inspect

A simple prioritization method helps you decide where deeper research is worthwhile. It should not produce a mysterious score that looks scientific but hides weak assumptions.

An original starting rubric

Score each factor 0 for absent or unknown, 1 for partial evidence, or 2 for clear evidence. Keep the supporting observation beside the score. The total is a sorting aid, not a buying probability.

Factor	What earns attention
Workflow fit	The account appears to perform the relevant work
Timely reason	A current, verifiable event relates to that work
Reachable owner	A relevant role can be identified through approved sources
Product fit	Known requirements appear compatible with your offering

Use the result carefully

An account with an 8 is not twice as likely to buy as one with a 4. The score simply records more supporting evidence under this rubric. A single mandatory incompatibility can override the total.

Review after conversations

If apparently strong accounts repeatedly reveal no meaningful issue, revisit the selection criteria. Do not respond only by increasing send volume or making the message more dramatic.

Keep an exclusion log

Record why an account was removed: wrong workflow, unsupported region, incompatible technical requirement or no relevant use case. Those patterns can improve future sourcing.

> Prioritization should make your judgment easier to challenge. If you cannot explain the score in a sentence, the underlying account brief needs work.

01 / CHOOSE WHERE TO FOCUS

Research the role, not the person's private life

Useful personalization connects a business observation to a responsibility the recipient likely owns. A reference to a hobby or unrelated personal detail can feel intrusive and still explain nothing about the value of the message.

A three-part research note

Record the source and date, the observation, and the possible implication. Keep the implication explicitly unconfirmed.

Item	Fictional example
Source	Company's published onboarding-team job posting
Observation	Role includes coordinating technical handoffs
Possible implication	Ownership across teams may be important
Question	How are incomplete handoffs handled today?

Identify the relevant owner

Look for responsibility, not only seniority. An operations lead may understand the workflow better than an executive who has little reason to answer a detailed process question. A later buying decision may involve both.

Set a research limit

Use a short, agreed time budget for ordinary accounts and deeper preparation for a smaller set of high-priority accounts. Stop when you can write a credible reason to contact the person. More details do not necessarily make the message more relevant.

Keep data provenance

Use approved sources. Record contact-data provenance; public visibility is not blanket permission.

> Personalization test: if the researched detail disappeared, would the business reason for the message change? If not, it may be decoration rather than relevance.

02 / CHECK THE CHANNEL

Prepare a responsible sending workflow

US commercial email rules apply to B2B messages too. The FTC's CAN-SPAM guidance requires accurate sender information and subjects, clear advertising identification, a valid postal address and a usable opt-out. Requests must be honored within 10 business days; the mechanism must remain usable for at least 30 days. Outsourcing does not remove responsibility. FTC: CAN-SPAM guide

Footer A: attach to every library email

Replace the fields with your employer's approved information. Ensure the reply route actually accepts and processes requests.

> [Sender name] | [Company] | [Valid physical postal address]
> This is a commercial message. Reply "unsubscribe" to stop marketing emails from [Company].
> Unsubscribe: [working unsubscribe URL]

The library's "Footer A" label is an instruction to append this completed footer, not text to send. A visible footer does not replace provider-required unsubscribe headers or any stricter requirement that applies to your campaign.

Original operating checklist

Before enrolling a contact, check the approved contact source, account ownership, prior communication, suppression status and the rules for the recipient and channel. Verify that another rep is not already holding an active conversation.

Make suppression immediate as an operating standard. Route ambiguous opt-out requests for prompt review; do not continue automated messages while debating the wording.

> A template is only one part of a send-ready message. Correct recipient selection, truthful content and a functioning response workflow matter just as much.

02 / CHECK THE CHANNEL

Treat deliverability as an operational responsibility

Copy cannot compensate for a misconfigured sending system. Ask the responsible administrator to verify authentication, transport, domain records, unsubscribe behavior and monitoring before a campaign.

For mail to personal Gmail accounts, Google requires SPF or DKIM for all senders and additional authentication for bulk senders, including SPF, DKIM and DMARC. Relevant bulk marketing traffic also needs one-click unsubscribe and a visible body link. Google prohibits misleading presentation such as fake reply subjects. Google: sender guidelines

Ask the administrator for a clear preflight

Check	Evidence to request
Authentication	A test message passes the required checks
Sender identity	From name and domain accurately identify the company
Unsubscribe	Visible route and required headers work
Suppression	Opt-outs stop all applicable sequences
Monitoring	Owner reviews errors and complaints

Know the scope of the rule

Google's FAQ describes bulk status as close to 5,000 or more messages to personal Gmail in 24 hours, aggregated across the same primary domain. Subdomains do not provide a way around that aggregation, and status persists once triggered. These inbound rules are not a universal statement about Google Workspace recipients. Google: sender FAQ

Authentication is not permission to send unwanted messages and does not guarantee inbox placement. Follow the sending provider's own terms as well as recipient-side requirements.

> If delivery errors rise, investigate before expanding volume. Do not keep changing copy while ignoring the system that sends it.

03 / WRITE THE MESSAGE

Write one reason, one useful idea, one next step

The recipient needs to understand why the message is relevant and what you are asking them to do. Use enough detail to establish that connection, then stop.

A practical message structure

Begin with a verified observation or a role-relevant question. Connect it to a plausible workflow issue without claiming inside knowledge. State an accurate capability or offer a useful resource. Finish with one reasonable next step.

Fictional body example

"Hi Priya, your onboarding-team posting mentions technical handoffs. I wondered how the team handles cases that arrive without complete requirements. SignalPath helps teams assign those exceptions to a visible owner. Is that a workflow you are reviewing, or is it working well enough today?"

This example assumes the posting and capability are accurate. A live message also needs the completed Footer A and any required sending-system features.

Edit the weak version

"We help innovative companies streamline operations and unlock efficiency" does not tell the buyer what changes. Replace broad benefits with a specific task or decision the buyer can recognize.

Keep the question easy to answer

Do not ask for a 45-minute demonstration, a referral and a document review in the same first message. Choose the smallest useful action for the context.

> There is no universal winning word count. Read the message aloud and remove sentences that do not explain relevance, clarify value or support the next step.

03 / WRITE THE MESSAGE

Use subject lines that describe the conversation

A subject should help the recipient understand the topic. A misleading subject can earn attention while damaging trust and creating compliance problems. Do not imitate an existing conversation with a fake "Re:" or "Fwd:" prefix. Google: sender guidelines

Original subject patterns to test

Pattern	Fictional example	Appropriate when
Workflow	Onboarding handoffs	The body addresses that workflow
Specific question	Owner for incomplete requirements?	You ask a relevant ownership question
Resource	Handoff review checklist	You are offering the named resource
Actual follow-up	Notes from our call	A call really occurred

Keep the experiment narrow

If you compare subjects, keep the audience, message body and sending conditions as similar as practical. Decide beforehand which outcome matters. A subject that draws replies from confused recipients has not necessarily improved the campaign.

Avoid curiosity without relevance

"Quick question" is vague. An urgent-looking subject is inappropriate when there is no actual urgency. A buyer should not need to open the email to discover that the premise was misleading.

Inspect replies, not just a dashboard

Read what recipients say. If they respond with "Who are you?" or "What is this about?", the subject and body may not establish enough context even if response volume rises.

> A useful subject sets an honest expectation that the body fulfills.

03 / WRITE THE MESSAGE

Personalize the business hypothesis

Personalization can happen at several levels. Match the research effort to the value of the account and the strength of the evidence, rather than inserting a token compliment into every message.

Level	What changes	Example
Segment	Shared workflow or constraint	Service teams coordinating onboarding
Account	Verifiable company event	Published expansion of onboarding roles
Role	Responsibility and language	Operations ownership versus technical fit
Conversation	What this buyer actually said	Their agreed question about exceptions

A useful boundary

Do not infer that a person is struggling simply because their team is hiring. Write "I wondered whether..." when the situation is uncertain. If you know only the role, a relevant question can be more honest than a fabricated trigger.

Keep product claims stable

Personalization should not cause the product to acquire a different capability for every account. Use approved descriptions and verify any customer proof before including it.

Apply a quick quality test

Can the recipient tell why you chose them? Is the observation accurate and recent enough? Does the proposed issue relate to their work? Can you explain the offered value without an unsupported outcome claim?

> The best personalization is not necessarily more personal. It is more specific about the work and the reason to talk.

Store the source note with the account brief so a reviewer can check the message without repeating the research.

04 / COORDINATE THE TOUCHES

Build a sequence around new reasons to respond

A sequence is a plan for a conversation attempt, not a requirement to send every scheduled message. Each touch should add something useful or test a different relevant angle. Stop or change the plan when the buyer responds.

Fictional starting sequence

Relative day	Channel	Purpose
1	Email	Test the workflow hypothesis
3	Live call, if permitted	Ask whether the issue is relevant
6	Email	Offer a concrete diagnostic resource
9	LinkedIn, if appropriate	Make a brief role-relevant introduction
13	Email	Close the sequence respectfully

This is an original test cadence, not an optimal schedule or a rule that five touches are necessary. Adapt it to recipient expectations, permitted channels, prior contact and your employer's requirements.

Define stopping rules before launch

Stop on opt-out, explicit rejection, a confirmed mismatch, an active conversation or a request to use another channel. Pause on a data-quality issue or a delivery problem. A reply belongs with a person, not the next automated step.

Coordinate across reps

Use one account owner or an agreed account plan. Several sellers independently contacting the same team can create conflicting messages and an inaccurate picture of engagement.

> Sequence quality is not the number of touches. It is whether each proposed touch has a truthful reason and whether the system responds correctly when the buyer does.

04 / COORDINATE THE TOUCHES

Use LinkedIn as a professional channel

LinkedIn prohibits unauthorized scraping and tools that automate activity such as sending messages or adding contacts. Use approved native or manual workflows and follow current platform rules. LinkedIn: prohibited software

A role-relevant connection note

"Hi Priya, I work on onboarding handoff workflows at [company]. Your role appears connected to that area. I would be glad to connect if the topic is relevant to your work."

Only use the claim about their role when supported. A connection acceptance is not proof of buying interest or consent to an unrelated bulk campaign.

After a relevant response

"Thanks for connecting. I was curious how your team handles incomplete requirements between sales and onboarding. If that is outside your scope or not a current priority, no problem."

Contribute before asking where appropriate

If you respond to a public post, address its actual content. Do not use an unrelated comment as a pretext for a concealed sales pitch or imply the author endorsed your product.

Keep the channel coordinated

Record a meaningful reply in the account workflow so email automation does not continue as if nothing happened. Honor a request to stop and do not move to another channel simply to evade it.

> Platform access is not an unlimited outreach entitlement. Use the channel in a way a professional recipient can understand and decline.

04 / COORDINATE THE TOUCHES

Make the phone touch a real conversation

Use an employer-approved calling process. Recipient number type, calling technology, consent and jurisdiction can change the applicable rules. A business title does not automatically make a mobile number exempt from restrictions. eCFR: 47 CFR 64.1200

The FTC's 2024 changes also extended prohibitions on misrepresentations to B2B telemarketing. Do not invent a referral, a prior relationship or a customer result. FTC: B2B telemarketing changes

Original live-call opening

"Hi Priya, this is Alex with [company]. This is an unexpected sales call about onboarding handoffs. Is now a reasonable moment for a brief explanation?"

If they agree: "We work on assigning incomplete handoffs to a clear owner. I wondered whether that is a process your team is reviewing or whether it is working well today."

If the timing is wrong

Respect the answer. Ask about a later time only if the person is open to it. An explicit request not to call should enter the approved suppression process.

Keep the scope narrow

This book's phone workflow assumes a live human conversation using approved systems. Prerecorded drops, autonomous voice, texting and recording require their own review; the email cadence does not establish permission for them.

> Your first objective is relevance and permission to continue, not forcing a meeting before understanding whether the topic belongs with this buyer.

04 / COORDINATE THE TOUCHES

Use video when showing something is genuinely easier

A short video can demonstrate a workflow more clearly than a paragraph. It can also create extra friction if the recipient cannot tell what the link contains or why it matters. Choose it for a visual explanation, not simply because it is another channel.

Original video outline

Start with your identity and the verified context. Show one relevant workflow using approved or synthetic data. Explain the question the clip helps answer. End with a simple invitation to respond.

"I am Alex at [company]. This example shows how an incomplete onboarding handoff can be assigned to an owner. The open question is whether this resembles the way your team works. If useful, I can explain the assumptions in a brief conversation."

Prepare the message around the clip

State what the recipient will see and provide a text summary. Use an approved hosting service and a recognizable link. Do not imply that viewing is required to receive basic information.

Protect the data

Close unrelated tabs and remove customer names, credentials, private pricing and internal notifications before recording. Use a fictional scenario unless sharing actual information is authorized. Review the final clip before sending it.

Evaluate the outcome

A play or click does not establish qualified interest. Look for a relevant reply and a useful next conversation. If recipients do not engage, ask whether the video adds clarity or just another task.

> A good clip answers one question. It is not a compressed full product demonstration.

05 / TURN RESPONSES INTO DECISIONS

Handle replies before continuing the sequence

Route replies to a responsible person. Read the actual message before selecting a response; automatic sentiment labels can miss nuance or a clear request to stop.

Reply type	Next action
Interested	Clarify the relevant issue and propose a useful meeting
Not now	Ask about timing only if the buyer invites future contact
Wrong person	Clarify ownership without pressuring for a referral
Already solved	Acknowledge; explore only if they welcome discussion
No interest	Respect the answer and stop the sequence
Opt-out	Suppress promptly through the approved process
Out of office	Pause and review the stated return context

A positive reply is not a qualified opportunity

"Sure, send something" could mean mild curiosity. Ask which question the information should answer. A meeting becomes more useful when both sides understand the purpose and who should attend.

Preserve the buyer's words

Record what they actually said and what you agreed. If they ask for a resource, do not mark a demonstration booked. If they say to try in November, do not continue the current sequence in September.

Avoid the channel escape

Do not treat an email refusal as an invitation to call repeatedly or message another profile. Coordinate the contact preference across your approved systems.

> Reply handling is part of outbound quality. A well-written opening followed by an irrelevant automated follow-up still creates a poor experience.

05 / TURN RESPONSES INTO DECISIONS

Make the meeting handoff useful

Before sending an invitation, establish a topic the buyer recognizes. Confirm the participants, duration, time zone and the question the conversation will address.

Original meeting confirmation

"Thanks, Priya. I will send a 20-minute invitation for [confirmed date/time and zone]. The purpose is to understand your handoff process and assess whether our approach is relevant. [AE name] will join because they can answer the workflow questions. Please let me know if another topic would make the meeting more useful."

Handoff notes for the AE

Item	What to include
Why the buyer replied	Their actual words or a faithful summary
Context	Verified account and role information
Hypothesis	What remains unconfirmed
Prior material	What you sent or discussed
Meeting purpose	Agreed question and participants
Constraints	Timing, channel preferences or known mismatch

Do not oversell the booking internally

A buyer agreeing to discuss a workflow has not confirmed pain, budget or purchase intent. Explain the state accurately so the AE can begin at the right point.

Learn from the meeting result

Ask the AE whether the context was accurate and whether the conversation was useful. Look for patterns in mismatched expectations. Improve the targeting or message rather than trying to make every booking appear qualified.

> The handoff is successful when the next conversation starts with shared context instead of correcting the promise that secured the calendar slot.

06 / LEARN FROM THE RESULTS

Measure outcomes with explicit denominators

Choose a small set of measures and define them before comparing campaigns. Separate people, accounts, messages and meetings. Mixing them can produce impressive-looking percentages with no clear meaning.

Fictional cohort: one first email per contact

Measure	Count	Defined rate
Attempted messages	200	Starting cohort
Delivered messages	190	190 / 200 = 95%
Positive replies	8	8 / 190 = 4.2%, rounded
Meetings booked	5	Reported count
Meetings held	4	4 / 5 = 80% of booked
Accepted opportunities	2	2 / 4 = 50% of held

These are original example definitions and numbers, not benchmarks. "Delivered" here means reported as accepted by the receiving system; it does not prove inbox placement or human reading.

Follow the cohort over time

State the observation window and allow time for meetings to occur. Do not compare a fully matured campaign with one that launched yesterday. If one contact receives several emails, distinguish message-level rates from unique-contact outcomes.

Inspect quality alongside volume

Read representative replies and review why meetings were accepted or rejected. A higher positive-reply rate may not produce better opportunities if the audience or promise is wrong.

> Put the denominator and period beside every rate. If you cannot name both, do not use the number to justify a campaign decision.

06 / LEARN FROM THE RESULTS

Run a small experiment without overclaiming

Choose one important uncertainty: audience fit, problem framing, subject or call to action. Change one main factor where practical, and keep a record of other differences that could influence the result.

Fictional comparison

Two message variants each reach 100 delivered contacts in the same defined segment. Variant A receives four positive replies; B receives six. That is 4% versus 6%, a two-percentage-point difference. It does not establish that B will reliably outperform A in the next campaign.

Before launching

Write the hypothesis, audience, assignment method, primary outcome, observation window and stopping rules. If you cannot assign contacts comparably, describe the test as an observational comparison rather than a controlled experiment.

Inspect the actual replies

Maybe B attracts more requests for a free resource but fewer qualified conversations. Maybe one account generated several responses. Review those details before declaring a winner.

Decide what to do next

You might continue collecting comparable evidence, test the message in a second cohort, revise the audience or stop a weak angle. Do not keep sending indefinitely just to reach a hoped-for result.

> A small test can improve your next question even when it cannot establish a reliable performance difference.

Avoid universal claims about ideal send times, touch counts or word counts unless you have evidence that fits your audience and context. Treat proposed schedules as experiments.