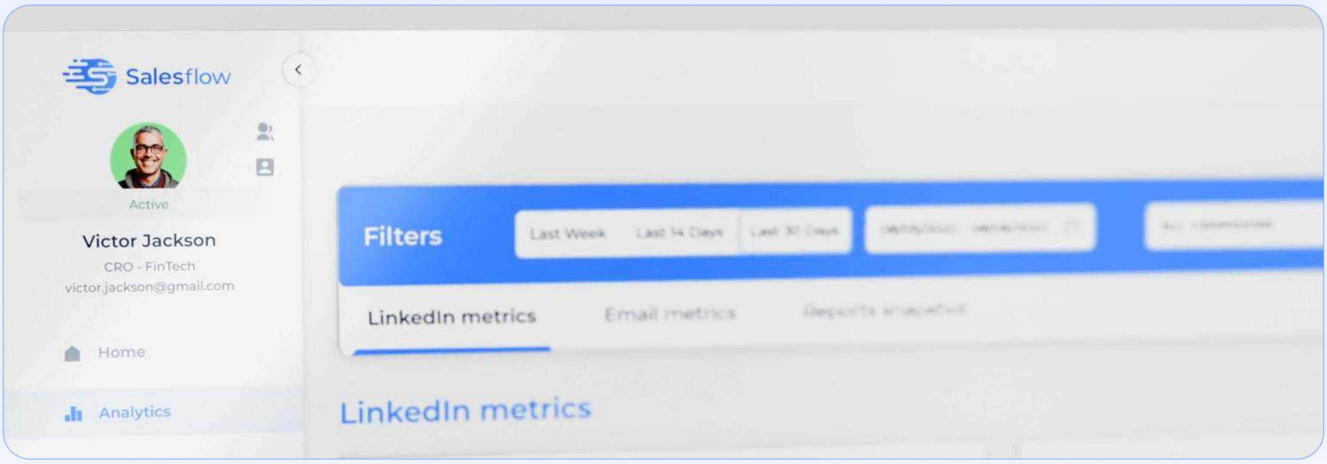
Salesflow

THE OUTREACH HANDBOOK



Intro:

People just want straight-to-the-point, all-action and implementable insights that they easily skim through.

These are 4x checklists from our **5+ years** in cold outreach distilled into this handbook.

These are:

1. LinkedIn Sales Navigator
2. Copywriting for LinkedIn Outreach
3. LinkedIn Profile Optimisation
4. Email Deliverability Checklist

SALES NAVIGATOR

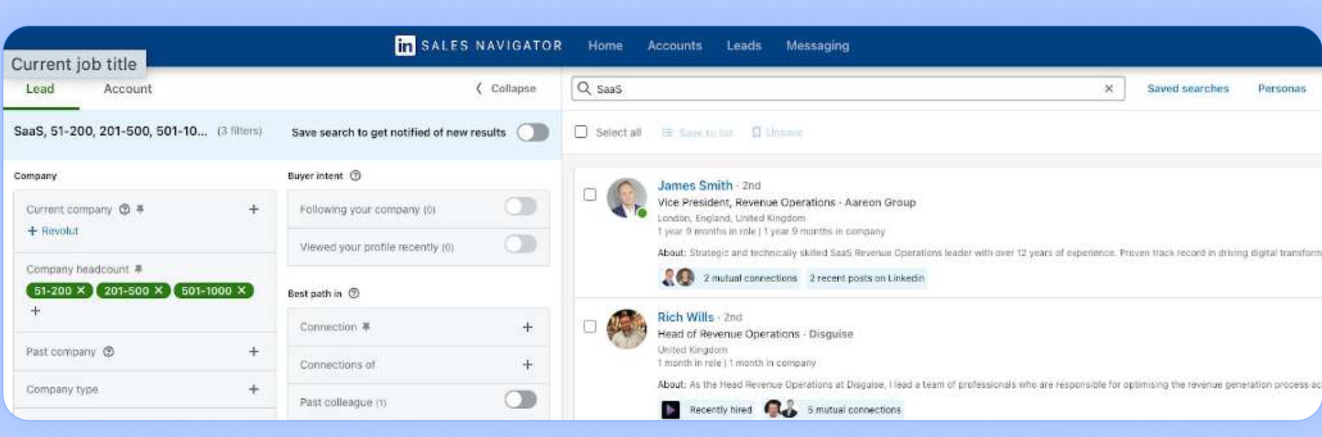
CHECKLIST

LinkedIn Sales Navigator is the upgraded version of LinkedIn, perfect if you know how to use it. It offers advanced search options to help you find and connect with potential customers. With Sales Navigator, you'll have more conversations with potential clients and build better relationships. **The Best Searches are:**

#1. Advanced Search:

When using advanced search, you have several filters at your disposal:

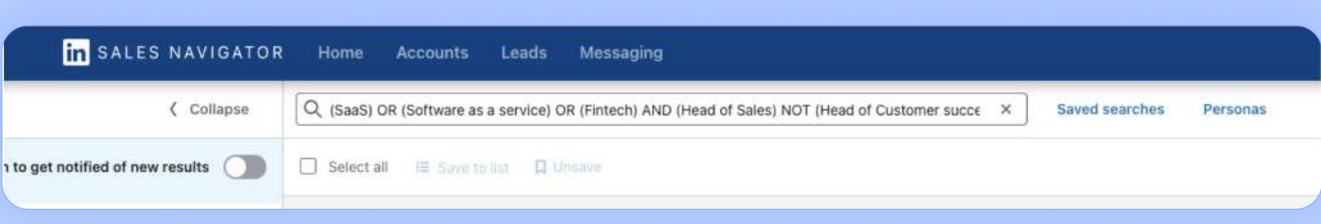
- [x] **Keywords:** Use relevant keywords found in your prospects' profiles
- [x] **Geography**: Specify a location if you're targeting prospects in a specific area, such as where your own office is located
- [x] **Title:** Narrow down your search by the position, whether it's CEOs, hiring managers, or both.
- [x] **Company Size:** Define whether you're interested in startups or larger corporations based on your target audience



#2. Boolean Searches:

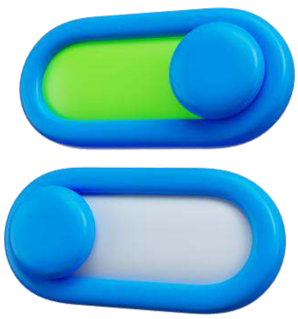
You can perform Boolean searches on Sales Navigator by combining keywords with operators like AND, NOT, and OR:

- **Quoted Search:** Use quotation marks for exact phrases, such as "sales manager"
- **NOT Searches:** Exclude specific terms from your results with the NOT operator, like "sales NOT manager"
- **OR Searches:** Find results that include one or more items from a list, for instance, "sales OR marketing OR advertising"
- **AND Searches:** Locate results that include all items in a list, such as "accountant AND finance AND CPA"

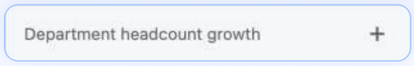


#3. Posted on LinkedIn:

Utilise this filter to discover content posted by potential buyers. This filter is accessible within the advanced LinkedIn Sales Navigator search.



#4. Department Growth:



Understanding the dynamics of specific departments can provide insights into a company's priorities and challenges. There are two ways to look at it:

- **Growing Departments:** Departments expanding, such as marketing, often have increased budgets and require additional resources or solutions. Emphasise how your offerings can support their expansion and enhance productivity.

- **Shrinking Departments:** Conversely, departments facing downsizing are focused on cost-efficiency and streamlining operations. Focus on how your solutions can help them reduce costs and improve efficiency

#5. Job Opportunities:

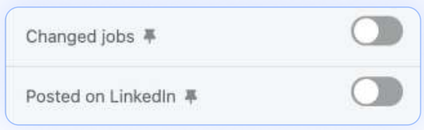
If a company is actively hiring on LinkedIn, it indicates that their decision-makers are engaged on the platform and more likely to see your message.

Highlight how your product or service can support their growing team or address challenges that come with expansion. Tailor your message to show you understand their current needs.

#6. Changed jobs:

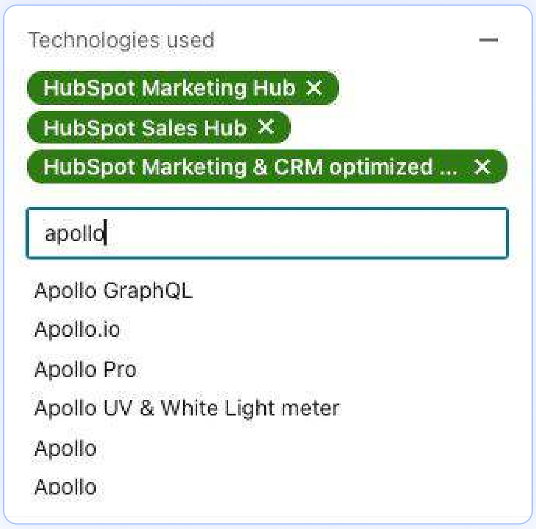
New hires, especially at the C-level, are in a phase where they have the budget, authority, and mandate to make changes and improvements

Congratulate them on their new role and position your product or service as a solution that can help them achieve their initial goals and make an immediate impact.



#7. Technology Used:

Identify companies that use specific software or technology, such as those integrating with Hubspot. Conduct this search in "Account Sales Navigator" using typical filters like location and company size, alongside a buyer signal (e.g., companies using Salesforce) for hyper-targeted results.



To find decision-makers within these companies:

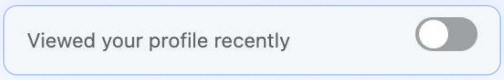
- ☑ Select all relevant companies and click on "View Employees" in Sales Navigator to access a list of all employees within those specific companies
- ☑ Apply additional filters to pinpoint decision makers, ensuring you're reaching out to the right contacts.

By leveraging these search methods effectively, you can refine your outreach strategy and connect with your ideal prospects on LinkedIn.

#8. Viewed Your Profile:

People who have visited your profile are already aware of you and have shown some level of interest. This familiarity often leads to higher acceptance rates.

Reach out to these visitors with a personalised message referencing their visit where your acceptance rate can be over 70%.



Essential steps:

- **Save Searches:** Saving searches saves time – you'll be running multiple LinkedIn Sales Navigator searches. It's a pain to enter the same search terms repeatedly for different campaigns. Fortunately, you can save your searches and return to them later to continue where you left off

- **Set Your Sales Preferences:** Sales preferences are criteria you set so that Sales Navigator shows you relevant leads based on region, industry, function, seniority level, and more

  This way, the platform recommends leads aligned with your interests. To set this up, hover over 'Edits' and select 'Edit your sales preferences'. Scroll down to the Sales Preference section and fill it out based on your target audience. Narrow your focus by geography, industry, company size, function, and seniority level

- **Warm Up Your LinkedIn Profile:** Start gradually by sending up to 10 connection requests per day and regularly monitor your account. After about two weeks, you can gradually increase your requests if everything is going well

- **Optimise and Update Your LinkedIn Profile Before Outreach:** Before reaching out, make sure to optimise your LinkedIn profile. People are more likely to accept requests from those with common interests. Ensure your tagline and summary showcase your personality

- **Start Creating Valuable, Free Content:** Create valuable, free content to attract connections. If visitors see you regularly share niche guides and insights for free, they'll be more inclined to connect with you

> By following these steps, you can enhance your LinkedIn Sales Navigator experience and improve your outreach effectiveness.

COPYWRITING

CHECKLIST

When it comes to cold outreach, the platform you choose—be it LinkedIn, email, or another—doesn't matter as much as your messaging does.

Poorly crafted messages end up in the trash or junk folder. We have developed five key elements from sales, marketing, and copywriting books, tested in the real world.

By incorporating the AIDA (Attention, Interest, Desire, Action) and PAS (Problem, Agitation, Solution) frameworks, you can infuse your messages with these fundamental principles, ensuring they resonate deeply.

#1. Niche:

- [x] Identify the companies and personas you target, broken down into firmographic and demographic data:
    - Job title
    - Day-to-day duties
    - Industry
    - Location
    - Company size
    - Revenue
    - Niche keywords
- [x] Ensure your message aligns closely with your target audience, keeping it clear and precise. Focus on specifics - targeting everyone with a general offer dilutes your copy, making it unappealing to anyone
- [x] Craft a strong message by addressing a niche, which makes capturing interest easier from the start

#2. Pain point:

☑ Understand that people buy to
solve problems and achieve desired outcomes, not for features.

☑ Identify and address a specific challenge your audience is facing, known as "X challenge"

- Highlight the challenge and provide specifics.
- Explain why the challenge is an issue and the pain points it brings.
- Show the consequences of continuing in the old way, focusing on time and cost.

☑ Use attention-grabbing techniques to engage your audience:

- **Hook:** Capture attention within 2-3 seconds.
- **Pattern interrupt:** Use something unexpected or different to stand out.
- **Techniques:** Storytelling, creative openings, humour, unconventional formatting, contrast/contradiction.

☑ Personalise your message:

- **Inject personality:** Add relatable stories, informal language, or a touch of humour.
- **Avoid jargon/buzzwords:** Keep the message straightforward.
- **Keep it concise:** Focus on brevity and clarity.

☑ Ensure relevance, build instant rapport, and test different variations:

- **Relevance:** Highlight and express the challenges your prospect is likely experiencing.
- **Instant rapport:** Build rapport based on solving problems for your prospect.
- **Test:** Measure and manage your outreach, split-test variations to find what works best.

#3. Solution

- [x] Clearly state what you offer and the results your customer gets:
    - Be specific about the desired dream outcome
    - Show why you are unique

- [x] Explain the tangible benefits of your product/service:
    - Help prospects see the positive change your product/service brings.

- [x] Highlight why your approach is the best:
    - Emphasise the best method to move from point A to point B, whether economic or emotional

- [x] Spark curiosity with real benefits:
    - Go beyond explanations to highlight benefits that make prospects want to know more.

- [x] Use simple language and avoid overused phrases:
    - Be specific and show exactly how you make a difference for your customers.

- [x] Stand out in the inbox with something unique:
    - Offer a special feature, personal touch, or creative twist to make your message memorable

We help **<Niche>** struggling with **<Pain Point>** due to **<Challenge/Road Block>** by putting **<Solution>** in place to achieve **<Outcome>** by **<X% In X Timeframe>**

Eliminating **<Struggle>** with **<Current Problem>** while enable them to **<Achieve Worthy Future Desired Outcome>**

#4. Credibility:

- [x] Build trust with social proof:
  - Testimonials, positive reviews, success stories, endorsements

- [x] Prove your claims with evidence:
  - Show the cause-effect relationship between your solution and the customer's positive outcome

- [x] Name-drop companies you've worked with:
  - Add success metrics and stats on what customers achieved
  - Invite prospects to see social proof on your website

- [x] Emphasise the importance of credibility in a sceptical market:
  - Highlight how credibility influences decision-making and transforms your copy into an authentic one

#5. CTA:

- [x] Plan a strong call to action:
  - Ensure it is clear, easy to understand, not overcomplicated, and involves only one ask
  - Provide a "what's in it for me" aspect to entice action

- [x] Make the CTA compelling and intriguing:
  - Examples of effective CTAs:

“Simple walkthrough on how you can do X by doing X”

“An action plan to show how X will get the rusults”

“Review market opportunity and how it can you with X”

“Brief 30-minute conversation to show the right strategies to take advantage of X”

“Short product tour to show how it can solve X problem”

- [x] Ensure the CTA is value-driven and comes from a place of service:
    - Highlight value, insight, and information provided free of charge, with no pressure or risk.
    - Explain the value drivers and why the prospect should show up for the call
    - Emphasise what they will learn or gain from the interaction

A. The money is in the follow-up:

The **$$** is in the follow up

Prospect — First Message — Follow Up — Follow Up — Follow Up — Qualified Lead

Messages fly by and people's focus is short, the real money comes from following up.

Skipping this step means missing out on opportunities and leaving money on the table.
Regular follow-ups build trust and turn potential leads into valuable chances, making consistent engagement the secret to success.

Avoid bland follow-up messages like "thoughts?" or "checking in." They don't cut it. Instead, here are five effective strategies you can use:

- Don't let your initial message go to waste—rewrite it and send it again.
- Grab attention with a different opening line or subject.
- Add a touch of humor to your follow-up—memes and jokes can work wonders.
- Limit yourself to 2-3 follow-ups max; being overly persistent can backfire. If you still don't get a response, give it a break and try again in a month

Skip the generic "just bumping my previous email" and try something more engaging instead.

B. How to measure success

Two ways to increase prospecting results: Increase the volume or increase the conversion rate.

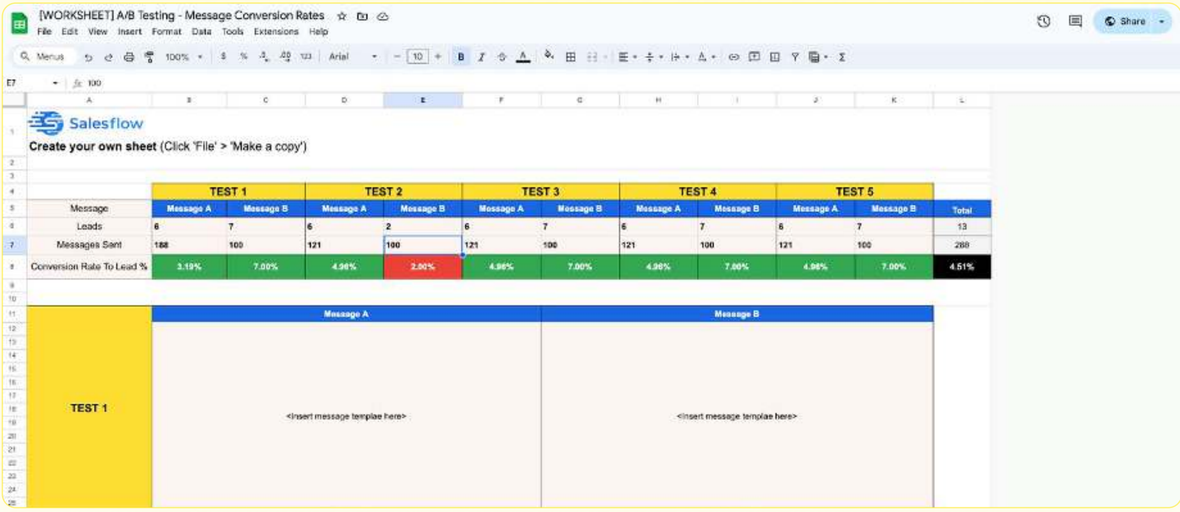
Doing both in tandem is where the real magic happens. But the hardest out of the two is the Conversion Rate. This requires a little bit of creativity and a lot of testing and measuring.

A 3% Conversion rate is the magic number. If 3 out of 100 people turn into a conversation, you're not far away from a successful campaign

Let's break the 3% down quickly with this example:

- 7000 contacts
- 221 leads
- 8 clients
- Average order value $5,000
- $40,000 new revenue

This shows the power of the 3% and the compound effect. The key is consistently testing messaging copy. **[Use this tracking sheet](#)**



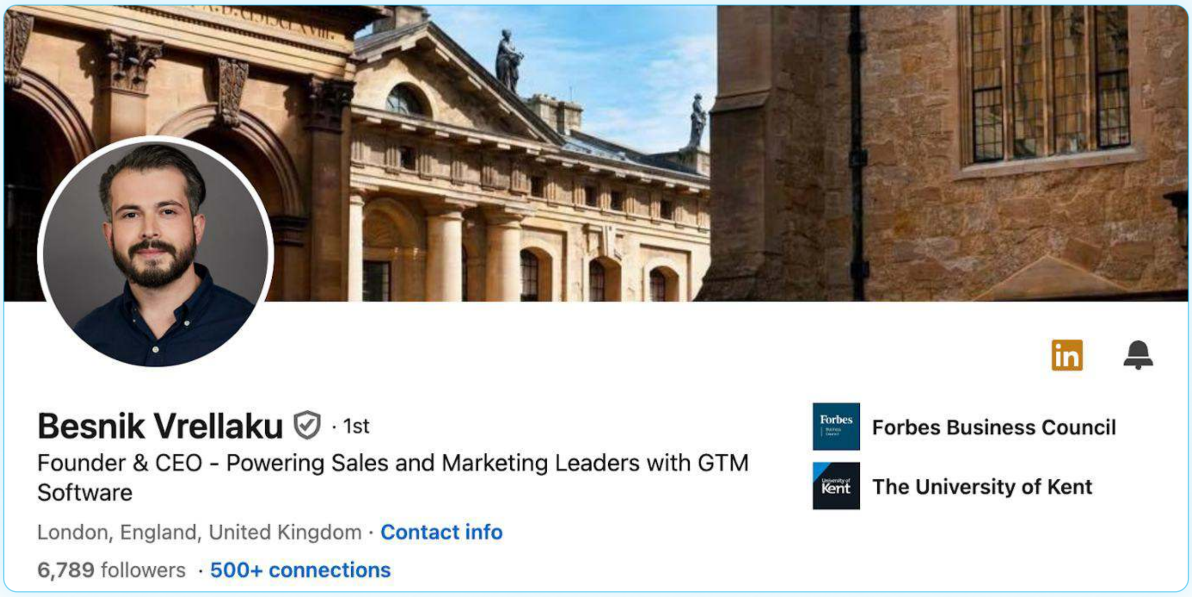
Grab a copy here to help you test your message conversion rate

LINKEDIN PROFILE

CHECKLIST

First impressions matter, you only have their attention for so long. People will examine your LinkedIn profile before even visiting your website, so it's essential to ensure it is as strong and engaging as possible

#1. Profile Photo & Cover



- Your profile photo is your first impression, and on social media, appearances matter. Ensure your photo is high-resolution and well-lit using good-quality camera or smartphone

- It’s like a badge on a car’s steering wheel—it may not be essential, but without it, something feels off. A well-chosen cover photo helps show people who you are and what you do

#2. Headline

With 220 characters, you need to convey who you are and what you offer succinctly. From our LinkedIn experience, here are three elements of an effective headline:

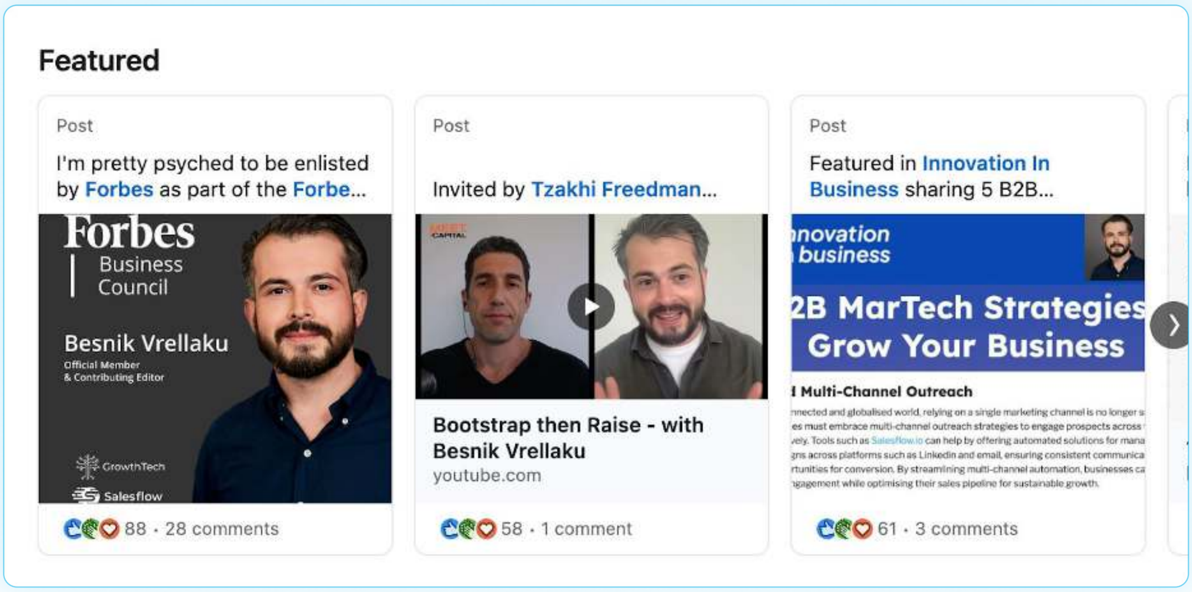
- ☑ **Your Role:** Clearly state your position. Transparency is key. For example, "CEO at ABC Company" tells people exactly who they're dealing with

- ☑ **Your Core Offer:** Focus on what you do or provide as short as possible

- ☑ **Social Proof:** Show your achievements or accolades. Mention contributions to renowned publications, significant client results, or prestigious awards. This builds trust and validates your expertise

- ☑ **Bonus:** something funny or personal for example “My kids say I'm hilarious” - this makes your LinkedIn profile a pinch human.

#3. Featured Section



The featured section allows you to highlight key content and direct potential clients to your other online presences. Include clickable links with custom images and text. Here are some suggestions:

- **Lead Magnet:** Link to a resource like a free ebook to capture leads

- **Testimonials:** Highlight reviews or testimonials for extra social proof

- **Key Content:** Showcase articles, videos, or posts from platforms like Medium or YouTube

- **Highlight Post:** Pin a high-performing post to draw attention and engage visitors

#4. Your About Section

About

My entrepreneurship journey started at the age of 15, buying and selling merchandise online.

Since then my journey has evolved through a total of 5 MVPs ventures and one micro successful exit.

For the last 5 years, leading a global remote team that powers over 10,000 Sales and Marketing users with future-proof Go-To-Market software that automates the B2B lead generation process for startups, growing sales teams and agencies used by the likes of Hubspot, Monday and LaunchDarkly.

I also Invest, advise and consult various SaaS startups.

Passionate about all things SaaS, Startups, technology & product, Sales & marketing growth, global GTM and culture & leadership.

Always excited about new ideas, new opportunities, meeting new folks and getting creative.

Feel free to connect and start a conversation about almost anything.

This 2600-character block is your chance to tell your story. If you've engaged readers with the previous steps, they'll want to know more about you. Structure your About into five parts:

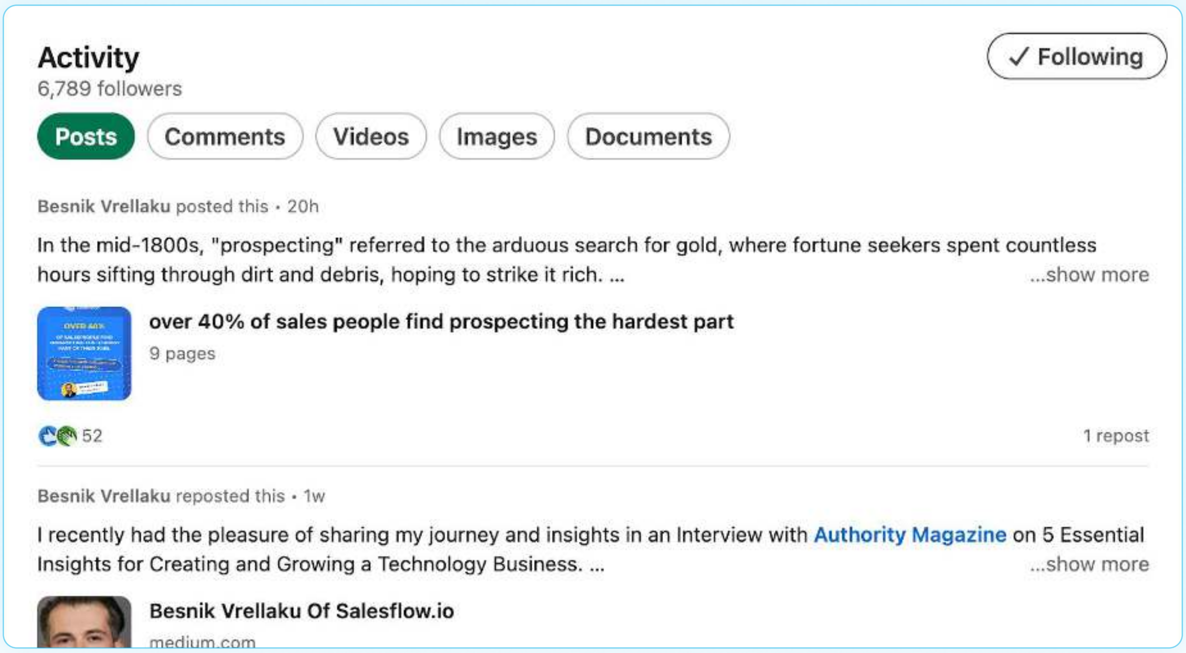
- [x] **Story:** Briefly introduce yourself and your journey
- [x] **The Challenge:** Identify a core problem in your industry
- [x] **The Solution:** Explain how you address this problem
- [x] **Social Proof:** Provide evidence of your success, such as client testimonials or case studies.
- [x] **Call to Action:** Direct visitors to take a specific action, like checking out your featured links or recommendations

Bonus 1. Your Recommendations

Ask satisfied clients for LinkedIn recommendations. These endorsements are powerful because they come from third parties and can be verified by viewing the recommender's profile. Accumulating recommendations from clients in your target demographic enhances your credibility and trustworthiness

Bonus 2. Create Valuable Content:

Share posts, articles, and videos that provide value to your audience. Over time, you'll establish yourself as a knowledgeable expert who can solve their problems when the need arises



Congratulations, You're Optimised

By following these steps, you'll create a LinkedIn profile that attracts more leads. **Now you can Connect with Ideal Clients:**

Build your network by sending connection requests to potential clients. Nurture these relationships to foster future business opportunities.

By refining your LinkedIn profile with these strategies, you're setting yourself up for increased visibility and client engagement.

EMAIL DELIVERABILYTY

CHECKLIST

Cold Outreach Deliverability Checklist

When your emails end up in the spam folder, it doesn’t just kill your lead generation efforts; it also damages your main domain’s reputation. This can cause all your emails, including regular communications and marketing newsletters, to be marked as spam. The consequences can be severe, affecting your entire business. Here's how to make sure your cold emails get delivered:

Data & Emails 🕵️

- [x] Avoid using outdated databases. Instead, utilise LinkedIn Sales Navigator and an email finder to keep lists current and minimise errors like “FirstName is no longer with the company”
- [x] Verify all emails to ensure accuracy
- [x] Remove invalid and risky emails
- [x] Double-check catch-all emails
- [x] Favorite tools: Clay and Hunter

Contact Lists 📝

- [x] Verify the First Name field to avoid robotic greetings (e.g., “hi john” or “hi 🚀John”)
- [x] Ensure the first letter is capitalised
- [x] Avoid using emojis.
- [x] Exclude Last Name from greetings
- [x] Validate the Company Name field, removing legal suffixes like “Ltd,” “Inc,” “LLC,” “GmbH,” etc.
- [x] Eliminate generic emails (e.g., info, sales, contact)
- [x] Eliminate generic emails (e.g., info, sales, contact)
- [x] Remove invalid emails
- [x] Exclude the following from your list:
    - Existing customers
    - Open opportunities
    - Contacts who opted out previously
    - Partners, competitors, etc.

Prepare Domain for Cold Outreach 🔗

- [x] Use your main domain for inbound leads (e.g., trials, demo requests) and bridge-bound leads (e.g., PDF downloads, re-engagement of lost deals)
- [x] Set up a new domain and email addresses for outbound cold outreach
- [x] Gradually increase daily sending limits to warm up the domain
- [x] Send test emails to colleagues and friends, asking them to reply to boost domain and inbox reputation
- [x] Check your spam score using tools like mail-tester.com

Subject Lines 📝

- [x] Keep subject lines short (1-5 words) and mobile-friendly
- [x] Avoid empty subject lines
- [x] Use any case except all lowercase
- [x] Do not use CAPS LOCK
- [x] Numbers can be used for social proof
- [x] Avoid emojisи

Email Templates 📧

- [x] Avoid selling in the initial cold email; be polite and tactful
- [x] Don’t ask for time right away; aim to reveal interest
- [x] Keep emails concise (50-70 words; maximum 100-120 words)
- [x] Use polite language and avoid strong CTAs
- [x] Structure your email with the following blocks:
    - Greeting
    - Intro
    - Reason for Outreach
    - Value Proposition
    - CTA
    - Signature
    - P.S. Sentence
- [x] Avoid multiple questions or asks; focus on one simple action
- [x] Use soft CTAs that are low-friction and interest-based
- [x] Talk about the recipient and maintain favourable ratios (e.g., I: You, Your Company: Their Company)
- [x] Keep initial emails free of additional content (e.g., links, GIFs, PDFs, attachments, images)
- [x] Ensure email length is manageable, using 3-5 paragraphs max.
- [x] Always A/B-test different elements (intros, reasons for outreach, value propositions, CTAs)

Email Personalization ✍️

- ☑ Go beyond basic personalization (e.g., {{FirstName}}, {{Company}}) by including:
  - {{Industry}}
  - {{JobTitle}}
  - {{Location}}
  - AI-generated or manually researched P.S. snippets or intro lines
- ☑ Do not fake personalization
- ☑ Use intent data for outreach reasons (e.g., new hires, use of specific tools, LinkedIn posts)
- ☑ Implement fallback variables, spintax, and liquid syntax to create unique emails
- ☑ Personalize follow-up emails with relevant content and insights

Email Deliverability & Technical Setup 🚥

- ☑ Implement technical changes (e.g., SPF, DKIM, DMARC, PTR, MX, A records)
- ☑ Check the age and reputation of your domain and email addresses
- ☑ Use mail testers and branded links
- ☑ Maintain a healthy inbound/outbound email ratio
- ☑ Ensure your domain is not blacklisted and has a low spam rate
- ☑ Warm up email inboxes gradually and monitor open rates
- ☑ Avoid sending bulk emails too quickly to prevent spam detection
- ☑ Make it easy for recipients to opt-out to avoid being marked as spam
- ☑ Use email tracking judiciously; avoid using short link services and broken links

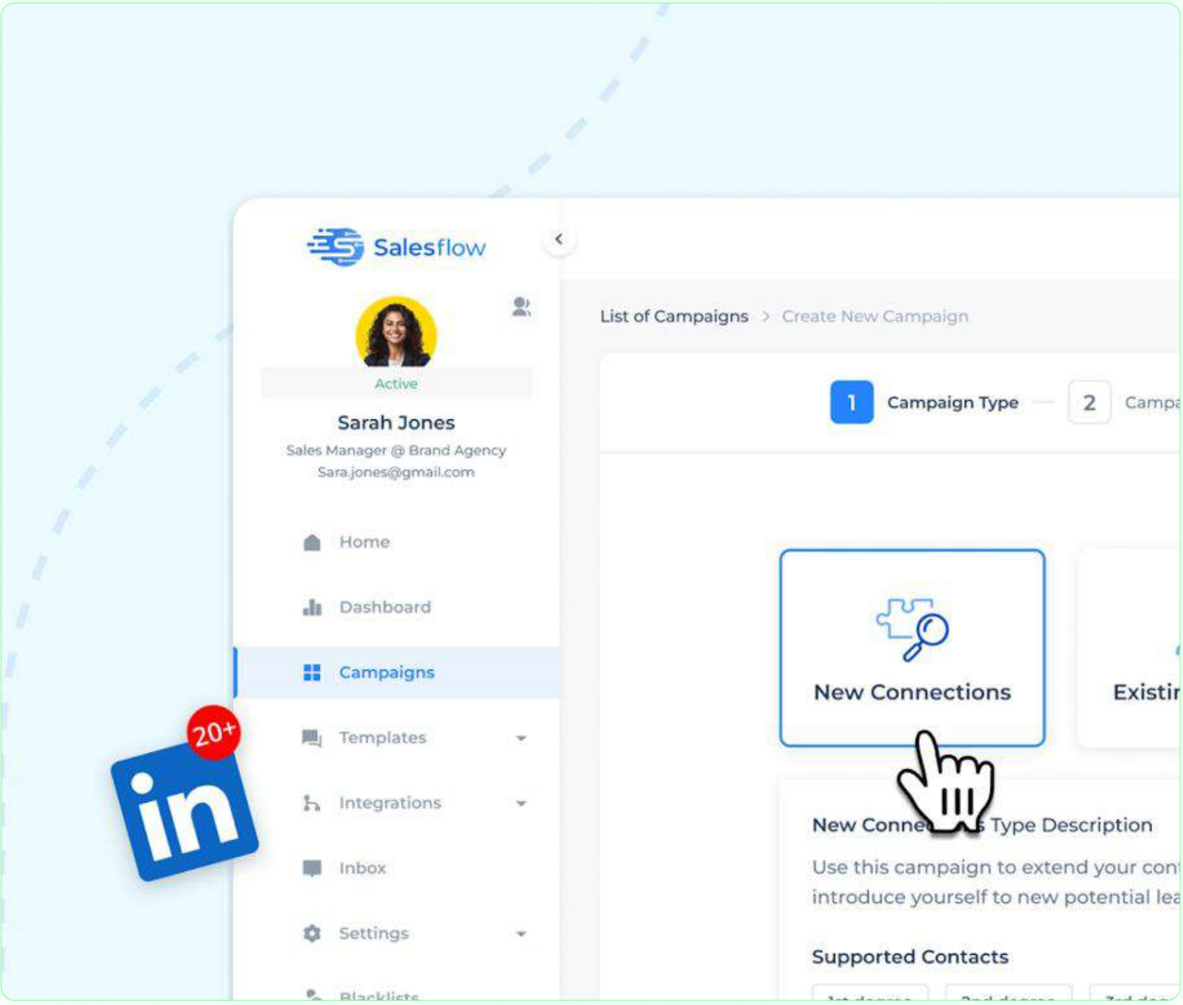
Planning and Analysis 📝

- ☑ A/B test everything: subject lines, templates, CTAs, ICPs, sequences, schedules
- ☑ Send initial emails on Tuesday-Thursday; use other weekdays for follow-ups
- ☑ Add city and country variables for timezone-specific scheduling
- ☑ Get feedback from your company's buyer persona to ensure the email resonates
- ☑ Focus on the interest rate (positive responses vs. sent emails) rather than open and reply rates
- ☑ Keep the bounce rate low (3-5% is acceptable)
- ☑ Continually analyze stats and innovate your personalization techniques

Setting this up fast

A. LinkedIn Automation

Use Salesflow.io to turn your LinkedIn into a system that converts leads without the manual effort and the worry of being banned. Choose between 4 different LinkedIn-specific campaigns

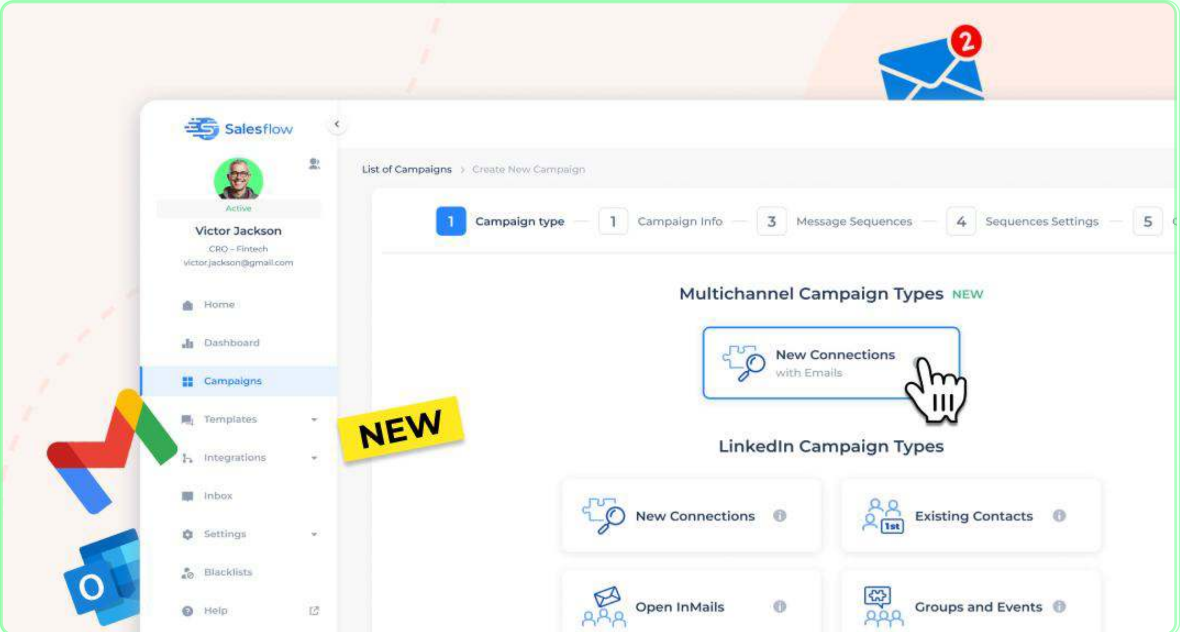


Send automated and personalised connection requests, messages and InMails.

Add automatic steps such as visiting LinkedIn profiles and engaging with people's posts with Auto likes and visit their profile

B. Multichannel

Don't limit yourself to one platform. Diversify and maximise your outreach with LinkedIn + Email. Combine email and LinkedIn multiple outreach sequences. Connect your email provider and set up multi-channel workflows within minutes.



Check this clip out on how to set up an outreach campaign in **under 4 minutes:**

Watch here

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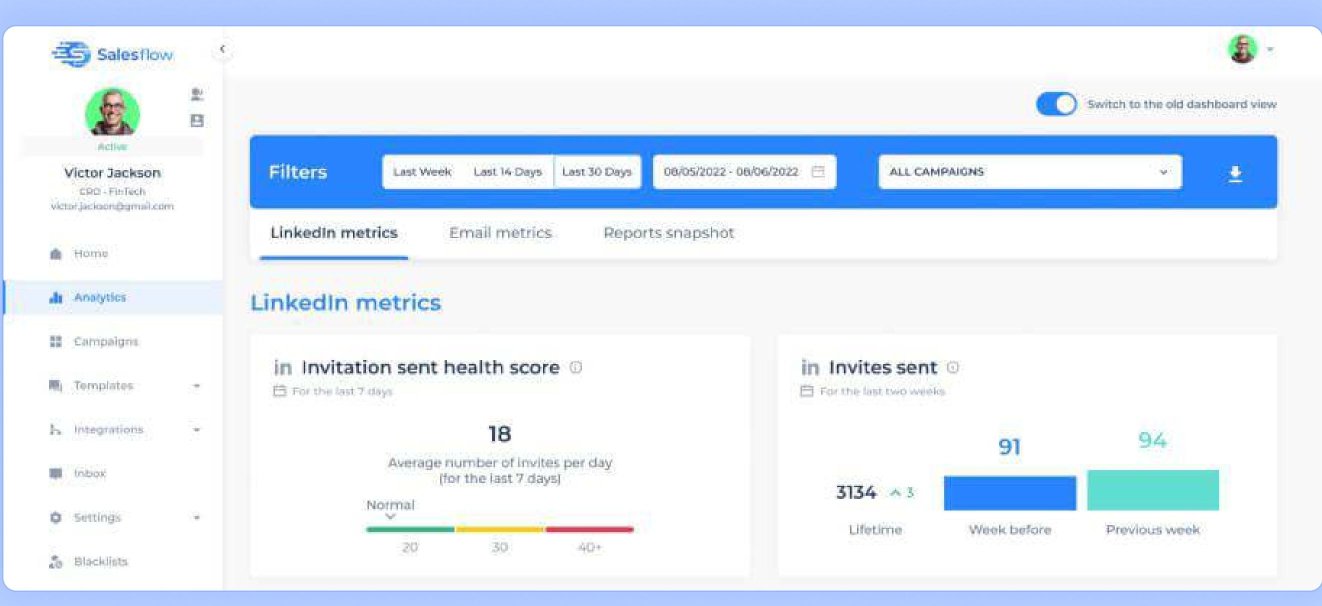
Try Salesflow for free



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