

Outbound Toolbox - guided workshop

Start with a goal and the work it requires. Assign a person or process, then verify the handoffs.

1. Strategy & offer		
Who should buy, why us, and why change? Output: A focused audience, a credible offer, and a clear next step.		
2. Accounts & contacts	3. Research & signals	4. Message & proof
Which companies and people can we reach? Output: A current, relevant, deduplicated audience. 	Why might this account deserve attention now? Output: A reasoned priority and evidence a person can review. 	What makes the approach relevant and credible? Output: A reviewed message with a useful next step.
5. Delivery & reputation	6. Channels & sequencing	7. Replies & meetings
Can the chosen channel carry the message reliably? Output: An authenticated, monitored sending setup. 	How do approved touches happen without collisions? Output: Coordinated contact with clear stopping rules. 	Who turns a response into a useful conversation? Output: A qualified next step with an accountable owner.
8. Records & operations		9. Measurement & learning
Who owns the system, its data, and its daily upkeep? Output: A reliable record and a workable operating rhythm. 		What produces worthwhile conversations at a viable cost? Output: A measured decision about what to keep, change, or stop.