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

Which companies and people can we reach?

Output: A current, relevant, deduplicated audience.

3. Research & signals

Why might this account deserve attention now?

Output: A reasoned priority and evidence a person can review.

4. Message & proof

What makes the approach relevant and credible?

Output: A reviewed message with a useful next step.

5. Delivery & reputation

Can the chosen channel carry the message reliably?

Output: An authenticated, monitored sending setup.

6. Channels & sequencing

How do approved touches happen without collisions?

Output: Coordinated contact with clear stopping rules.

7. Replies & meetings

Who turns a response into a useful conversation?

Output: A qualified next step with an accountable owner.

8. Records & operations

Who owns the system, its data, and its daily upkeep?

Output: A reliable record and a workable operating rhythm.

9. Measurement & learning

What produces worthwhile conversations at a viable cost?

Output: A measured decision about what to keep, change, or stop.

Manual workshop model. Provider capability is not configured operation or actual performance.