

Apollo's Outbound Sales Guide

Original Source:  The Ultimate Guide to Generate More Pipeline | Apollo

Curated by: [Marcus Cheu](#) of [SalesDuo](#)

Why I'm Creating This?

- As I was looking through the book, I got a lot of insights, and was inspired to put it together into an actionable guide
- So I reached out to Joshua (who wrote the book) to get his thoughts on it



Marcus Cheu · 12:47 PM

Hey Joshua, thanks for putting the outbound sales book together! I'm just going through it now and I'm getting a lot of insights, so I'm thinking of putting together a Notion doc with the step-by-step guide and reference your work - hope you don't mind?



Joshua Garrison · 12:47 PM

hey Marcus, go for it!!
so glad you enjoy it!

- He loved the idea, so here I am translating the insights from the book into an actionable step-by-step guide :)
- **Note:** I would recommend reading through the [original source](#) for the full experience, my focus will be on capturing the key insights and translating them into action items!
 - *You can duplicate this template for your own use at the top right-hand corner*

Overall Summary

The book is broken up into 8 sections:

1. [The Truth About Outbound Sales](#)
2. [Prospecting](#)
3. [Cold Emailing](#)
4. [Cold Calling](#)
5. [Social Selling](#)
6. [Multichannel Outreach](#)
7. [Email Deliverability](#)
8. [Growing Your Sales Team](#)

Here are the key templates to adopt for your business:

- [ICP Framework](#)
- [Signal Filters](#)
- [Lead Scoring Model](#)
- [Deeper Research for Top Prospects](#)
- [Tier 1 Prospects Email Copy](#)
- [Tier 2+3 Prospects Email Copy](#)
- [Your 3-Step Email Series](#)
- [Cold-Calling Script](#)
- [Social Selling Framework](#)
- [LinkedIn Engagement Network](#)
- [Multichannel Outreach Sequence](#)
- [Sales Plays](#)
- [Outbound Prospecting Benchmarks](#)
- [Domains for Email Deliverability](#)
- [Email Deliverability Checklist](#)
- [Your Sales Incentive Model](#)

The Truth About Outbound Sales

- Traditional sales model is fundamentally broken...
- 3 truths every GTM professional needs to know to be successful today:
 - i. Single-channel selling doesn't work anymore - multichannel generates almost 2x meetings booked

Outreach approach	% Users booking meetings with approach	Improvement

No sequences used	16%	
Single-channel sequence Auto-email only	46%	+30 percentage points
Multichannel sequence Auto-email + manual emails + calls + LinkedIn touches	70%	+24 additional percentage points

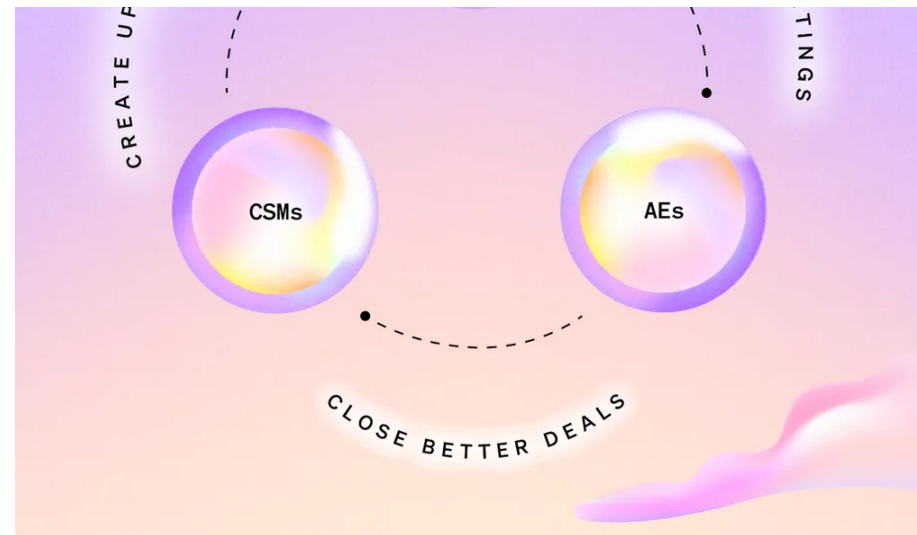
ii. Unchecked automation will ruin your relationships

- With email service providers cracking down on bulk sending, there are no shortcuts to outbound anymore
- You need **personalisation** that reflect a deep level of engagement and research

iii. Misaligned incentive models create chaos

- 90% of the greatest 20 GTM minds agree that **SDR role is dead**
- For most small businesses today, **hiring "full cycle" salespeople to own the entire end-to-end process** is the right move
- For teams that split responsibilities between setters and closers, the most successful teams use compensation models where:
 - "Meeting setters" are compensated partially on revenue closed in addition to meetings set, and
 - "Deal closers" are compensated partially on renewal revenue in addition to new revenue
 - Customer success managers are compensated partially on expansion or new revenue they source via referrals





Prospecting

- There's a 50/50 split on organisations that use contact-based vs account-based prospecting
- What you should adopt depends on what you sell, and who you sell to:
 - Contact-based prospecting:
 - If you sell something **highly transactional** or something that's easy for a single person to make a decision on
 - This is when you **find and identify the right individuals within the organisation**
 - Account-based prospecting:
 - If you're selling an **expensive product with a longer sales cycle**
 - This requires you to identify and **strategically map out multiple people within an organisation** to cast a wide net for the right decision maker and get proper buy-in as early as possible
- Before you start prospecting, you need to craft your ideal customer profile for:
 - i. Higher reply rates
 - ii. Shortened deal cycle
 - iii. Better chance at a long-term partnership

How to Define Your ICPs?

Step 1	Pull a list of all your deals from the last 90-120 days and include all titles involved in the purchase.
Step 2	Ask key questions about the types of people and companies involved in the deal: <ol style="list-style-type: none"> 1. What industries are they in? 2. What are the titles of people you've interacted with? 3. What are the characteristics of their company? (employee count, locations, etc.)? 4. Is there a difference between who signed the contract and who actually uses your product/service?
Step 3	Identify common threads you see in the data. What's common across: <ol style="list-style-type: none"> 1. Industry? 2. Geography? 3. Company size? 4. Technologies or services used?

ICP Framework

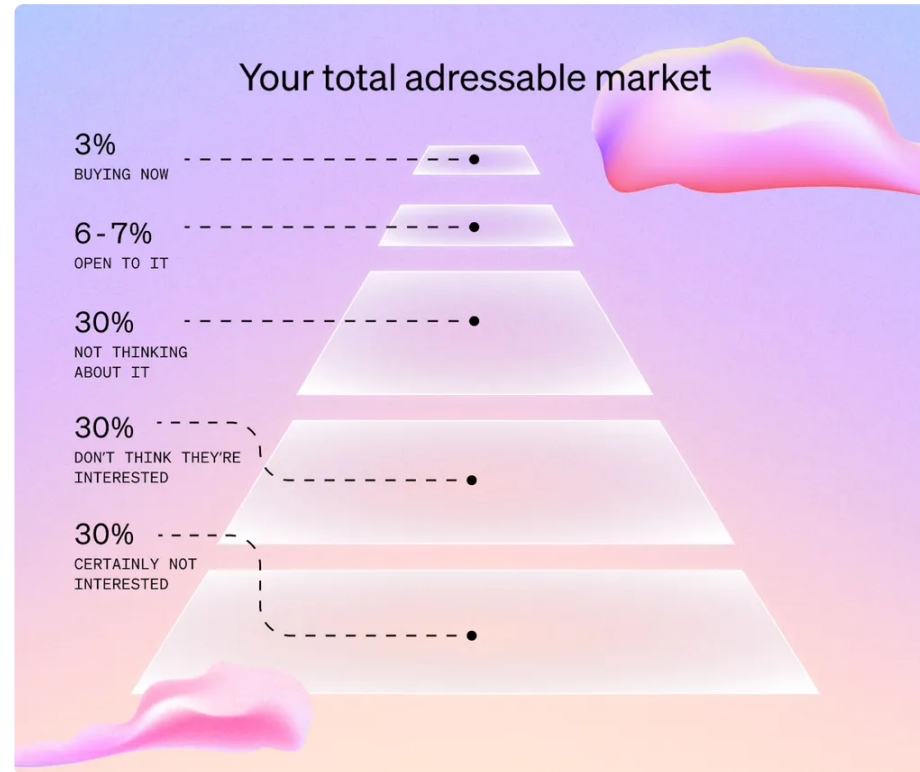
You can use the table below for your own business!

Attributes	Example (Construction Management Software)
Step 1: Identify WHO your ideal customer profile is	<i>Audit every closed won deal from your last two quarters and identify your three key personas (buyer, champion, end user).</i>
Job titles:	<i>Project Manager Construction Manager Site Supervisor Site Engineers Quality Assurance Managers Safety Officers Architect Civil Engineer Operations Manager Chief Technology Officer (CTO)</i>
Management level:	<i>Mid-level: Project Managers Site Supervisors Senior-level: Construction Managers, Operations Managers C-level: CTO, CEO for strategic technology adoption decisions</i>
Number of employees:	<i>Small to medium enterprises (SMEs) = 10-500 employees Larger firms = 501-1,000+ employees (for more extensive projects and</i>

	<i>enterprise solutions)</i>
Industries:	<i>Construction Architecture & Planning Civil Engineering Real Estate Development</i>
Keywords:	<i>"Construction management" "Project management software" "Building information modeling (BIM)" "Construction scheduling" "Cost estimation software"</i>
Location:	<i>US or specific states with booming construction activity (can be tailored based on your market analysis)</i>
Revenue:	<i>SMEs: \$1 million to \$50 million Larger firms: \$50 million to \$1 billion+</i>
Step 2: Identify WHEN each of your personas is likely to buy	<i>Start with using 1-2 of the below that's most relevant to your ICP and build a campaign around those signals.</i>
*Buying intent	<i>Active search for "construction management solutions". Engagement with content about digital transformation in construction.</i>
*Technologies	<i>Currently using basic project management tools (indicating a readiness to upgrade). Interest in or early adoption of BIM technology.</i>
*Headcount growth	<i>Companies expanding their project portfolios or workforce, indicating a need for scalable management solutions.</i>
*Job postings	<i>Listings for tech-savvy construction roles or project management positions requiring experience with construction software.</i>
*Website visitors	<i>Frequent visits from industry-specific domains or users exploring product features, pricing, and case studies on your site.</i>
*Funding	<i>Companies that have recently received funding rounds A and beyond, indicating potential investment in tools for scaling operations efficiently.</i>

Lead Prioritisation

- Only 3% of your total addressable market at any given moment are active buyers



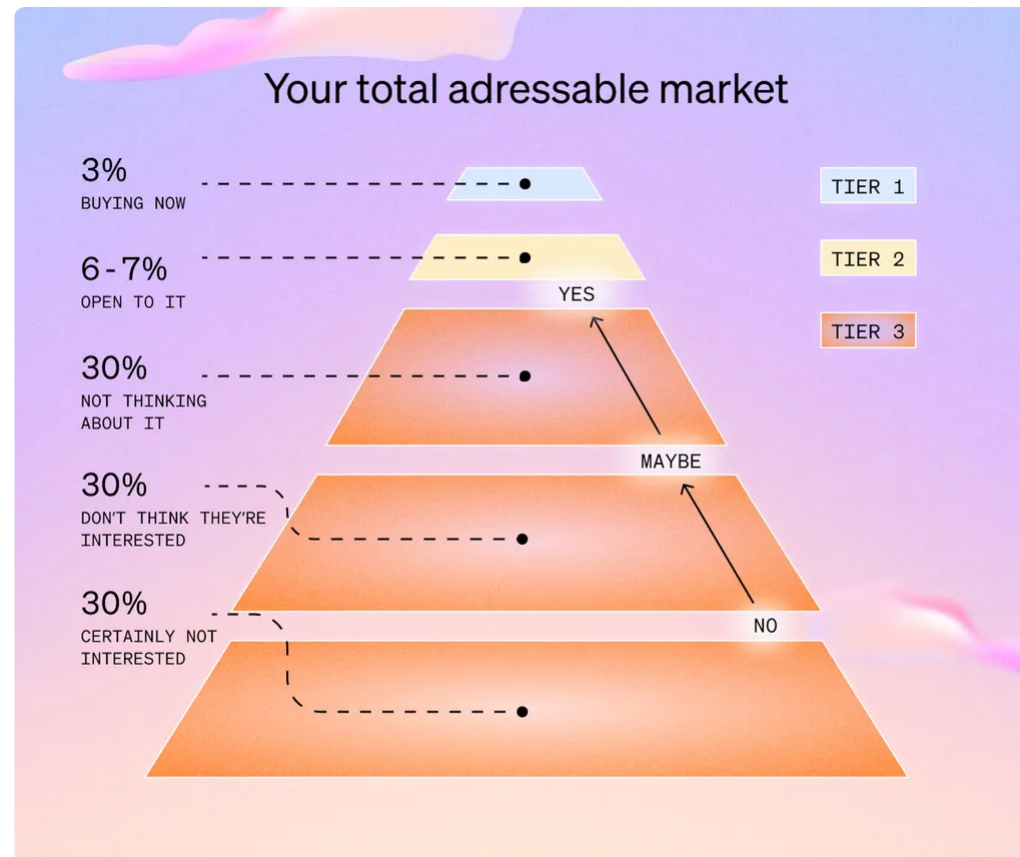
- Focus your efforts on the 3% of people who are “buying now” using “signal filters”
 - Whether or not they recently received funding
 - Their annual revenues
 - How many people they’re currently hiring for and in what roles
 - What technologies they use
 - Whether they’ve visited your or your competitors’ websites

Filter by signal	Why use it?	Which prospecting model is it best fit for?	Whi bes
Job change: target personas who have started a new job	Learn when your previous customers or champions land in new companies and leverage their past success with you to open doors. By connecting with champions who have had a positive experience with your brand, it’s easier to bring your solution/service to their new company. They will be key to helping you pilot the ins and outs of a new potential account.	Contact-based prospecting	Wid

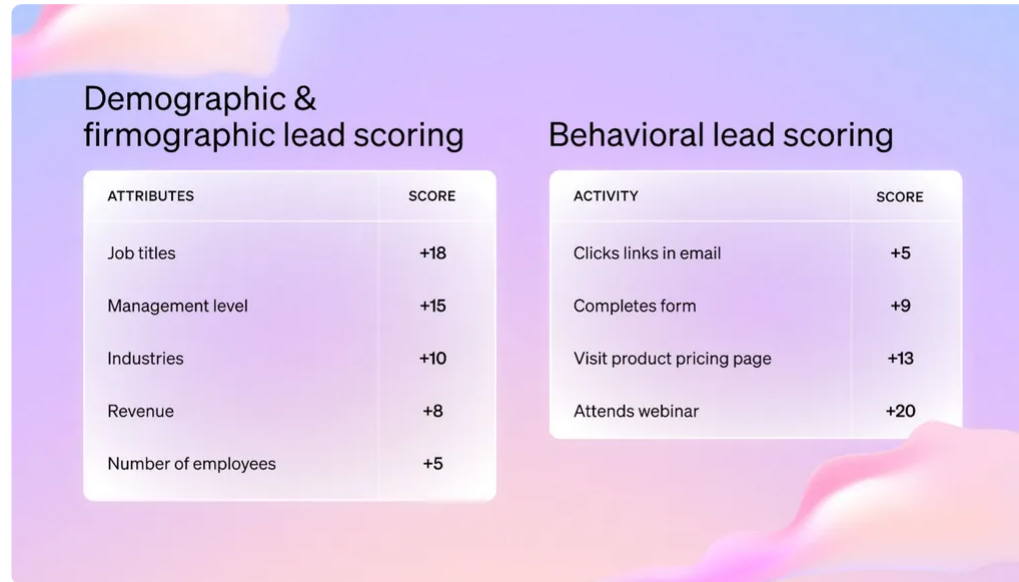
<p>Time in current role: number of years a contact has in their current role</p>	<p>Effectively target individuals and companies at critical transition points. For individuals, a longer tenure might indicate readiness for new challenges or career advancement, making them more receptive to new opportunities.</p>	<p>Contact-based prospecting</p>	<p>Wid but for recr</p>
<p>Buying intent signals: target personas who have researched products and services like yours</p>	<p>Zero in on buyers who are actively researching your product or service category. When you apply buying intent signals, you gain insight into which companies are in the early stages of the buyer's journey so you can reach out (before your competitors) and keep your product top of mind.</p>	<p>Account-based prospecting</p>	<p>Wid</p>
<p>Website visitors: contacts who visited pages on your website</p>	<p>When someone visits your website they are expressing a level of need and are much more likely to be receptive to sales outreach. Identifying who has viewed a page and analyzing their behavior (i.e. pages they viewed most, content they engaged with, how they found your site) can provide valuable insights into their specific interests, pain points, and readiness to buy.</p>	<p>Account-based prospecting</p>	<p>Wid</p>
<p>Technologies: companies that are using tools and technologies relevant to your product or service</p>	<p>This is a valuable data point for understanding: a) If prospects are using competitor solutions; this way you can tailor your messaging to your competitive value. b) If prospects are using tools that are compatible with your solution; for example, if you sell an SEO tool, a Tier 1 or 2 prospect is likely a company using WordPress (or another CMS).</p>	<p>Account-based prospecting</p>	<p>IT & serv</p>
<p>Job postings: companies that are currently hiring across specific departments</p>	<p>This filter is helpful for understanding exactly where a company is looking to dedicate more of their resources, indicating a strategic focus on growth, brand development, or market expansion. This investment in personnel often correlates with a broader willingness to adopt new marketing technologies, tools, and services to achieve these goals.</p>	<p>Account-based prospecting</p>	<p>Wid</p>
<p>Headcount growth: companies that are going through significant expansion</p>	<p>Use this filter to identify a company's expansion phase, which often comes with new needs and challenges that your products or services can address. Companies experiencing headcount growth are likely to invest in new tools, technologies, and solutions to support their larger workforce, streamline operations, or scale up their business.</p>	<p>Account-based prospecting</p>	<p>Wid</p>
<p>News: important updates for companies who have been newly acquired or hired a new C-level</p>	<p>This filter gives you insights into market trends, regulatory changes, and corporate strategies. Find the companies who are undergoing transformations, facing industry challenges, or</p>	<p>Account-based prospecting</p>	<p>Mar con</p>

<p>executive</p>	<p>seeking to capitalise on new market opportunities — it can indicate a need for expert advice and external support.</p>		
<p>Funding: companies who have recently received funding and/or investment</p>	<p>Companies that are newly funded are likely experiencing rapid growth. They might be looking for strategic advice on scaling operations, managing their expanding workforce, or entering new markets efficiently — plus you know they have cash to spare. (Conversely, firms with stagnating or declining revenues could be in need of consulting services to identify areas for cost reduction or other operational improvements.)</p>	<p>Account-based prospecting</p>	<p>Wid and help serv</p>

- You can then tier your leads accordingly to focus on the tier 1 prospects:



- To refine your tiering, you can adopt a lead scoring model:



- Your own lead scoring model:

Attributes	Score
Job titles	+18
Management level	+15
Industries	+10
Revenue	+8
Number of employees	+5
Activity	
Clicks links in email	+5
Completes form	+9
Visit product pricing page	+13
Attends webinar	+20

Deeper Research for Tier 1 Prospects

- To better understand your prospects, you should look out for key signals:
 - *Highlight what's relevant for you below, or add new ones!*

Company-level info (Your CRM, company website, socials, Google search)	Contact-level info (Your CRM, LinkedIn, Reddit, social platforms)	The industry & market (Google search, news publications, analyst reports)
<ul style="list-style-type: none"> • Company description • Investors who funded • Executive activities • Product milestones • Mergers and acquisitions • Company growth • 10ks • News and PR • Purchase history 	<ul style="list-style-type: none"> • University/college • Job anniversary • Career moves • Presentations at events/podcasts • Published content • Previous roles • Previous employers • Mutual LinkedIn connections • LinkedIn posts and engagement • Recent awards or recognitions • Previous engagement with your brand 	<ul style="list-style-type: none"> • Recent industry trends • Industry terminology • Industry conferences • Review sites; G2, Capterra <p>IT & Technology:</p> <ul style="list-style-type: none"> • Crunchbase • TechCrunch <p>Marketing:</p> <ul style="list-style-type: none"> • Adweek • Digiday <p>Finance & Management:</p> <ul style="list-style-type: none"> • Financial Times • The Economist • Wall Street Journal

- After we've qualified these pool of leads to make sure they're worth time and resources to engage with them... then we can build a system to engage them 📌

Cold Emailing

- Different tiers of leads will warrant different levels of personalisation:
 - Tier 1: Hyper-personalisation
 - Tier 2+3: Personalisation + templates

Tier 1: Hyper-Personalisation

- 3 layers of researching and understanding your prospects:
 - i. Research the human
 - ii. Research the company
 - iii. Learn the space

Human	Company	Industry
Work history	What exactly does their product do?	Learn the language of the specific vertical
Technology used	What are their values?	Set up interviews to speak with your customers
Intent signals	Who do they help?	Understand why your company is important to your customers
Previous engagement with your brand	Are they participating in any podcasts or events?	
What do they post about?		
Who do they follow?		
What are their skills, hobbies, and interests?		

• Example:

EXAMPLE

SUBJECT: Benji the Bengal's Favorite Pilot/Flying J

Hi Jim,

We haven't met yet, but I'm Josh and I run the couponing program at Coupons2Go. I often drive across the country for work and whenever I can, I stop at a Pilot/Flying J —y'all have hands down the best experience of any travel center! When I saw you went to Buffalo State I wanted to drop you a line of some Flying J Trivia.

Here it is: the closest Pilot/Flying J to Buffalo State is in what country?

While that percolates, the real reason I'm reaching out is to chat about Coupons2Go. My guess is, if you could find a way to both delight Pilot's 1.5m daily customers and increase per-transaction revenue by 20% or more, you'd do it. But it's hard to make that kind of impact at your scale.

That's exactly what we do at Coupons2Go. While you do already have some awesome couponing strategies in place, our digital coupons have a massive nationwide reach that have helped some of our (lesser) competitors break their quarterly sales targets already.

If you're up for a chat about this I'd be thrilled to find a time whenever is convenient for you.

Cheers!
Josh
(PS.....the answer is....Canada!!!!)

Transition

Challenge

Value Proposition

The Close

SMYKM® Subject Line

Non-salesy first sentence

Shameless flattery

Fun

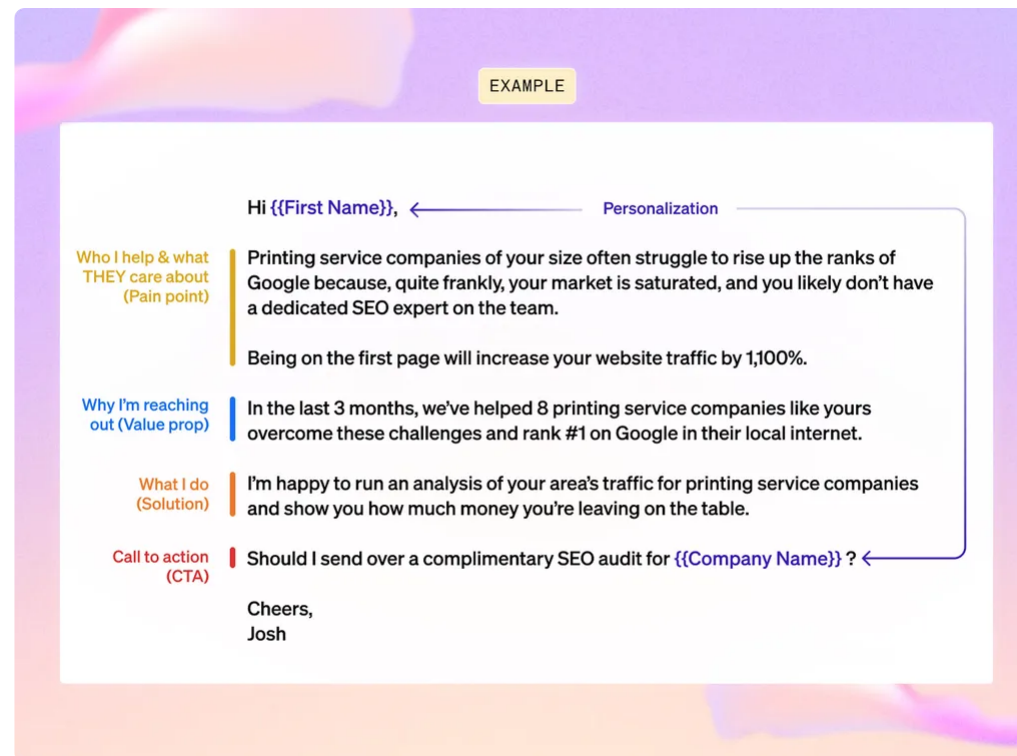
Objection handling

• Your tier 1 email copy:

Subject Line	
Body Copy	
CTA	
PS	

Tier 2+3: Personalisation + Templates

- Depending on the size of your audience and the information available, you may not have enough time to write hyper-personalised emails for all your prospects
- This is when you want to personalise at scale by sub-segmenting your lead list based on signal filters:
 - Recent acquisition
 - Job changes
 - Funding
 - Industry
- Example:



- Tell them why they should care
 - Explain why you're reaching out
 - End with a simple, soft question that can easily be answered with a "yes," "no,"
- This is the benefit of sub-segmentation to ensure relevant messaging that can be scaled across entire groups of leads.

- Your tier 2+3 email copy:

Subject Line	
Body Copy	
CTA	
PS	

Using A 3-Step Email Series

- You can use a simple 3-step email structure to unlock a +25% reply rate:
 - Intro email:** The highly-personalised first impression and where you'll spend most of your time
 - Follow-up email:** The short tidbit that resurfaces the first email
 - Breakup email:** The last-ditch effort to solicit a reply
- Intro email includes:
 - Click-worthy email subject lines - example: "Switzerland + Le Dip Cheeseburger + {{your company name}}"
 - Aim for a pattern interruption
 - Personalised body copy (refer to [tier 1](#) and [2+3](#) for level of personalisation)

- Goal of the follow-up email is to resurface your first relevant message:
 - Directly respond into the thread
 - Throw out a quick, one-sentence question that can be answered with a "yes" or a "no"

- For the breakup email, the goal is to take a different approach and have a pattern interruption
 - A way that works is to re-state the value from the first email and give readers a laugh

- Your 3-step email series:

Intro Email	
Follow-Up Email	
Breakup Email	

Cold Calling

- Proprietary Apollo data reveals that, in addition to sending an auto-email, simply picking up the phone (call connected or not!) results in a **6% increase in meeting booked rate**
- A few reasons why cold calls works:
 - i. **It forces a prospect to give you their attention.** You get your prospect's ear in real time.
 - ii. **It humanises you — a lot.** You have more control over how you present yourself, from the words you choose to your tone.
 - iii. **It protects your domain.** An overreliance on mass emails can hurt you far more than it can help you.

- 3 key things to turn cold calling into a profitable outbound channel:
 - i. Practice, practice, practice
 - You can follow this simple 7-day process for getting comfortable on the phones and perfecting the pitch:

 - ii. Stay consistent using time blocks
 - To make cold calling a legitimate stream of revenue for your business, you need to prioritise picking up the phone every single day
 - Your results will vary day-by-day, but that's just part of the game

 - iii. Warm up prospects before you call them
 - It's important to do thorough preparation and research before picking up the phone
 - Use personalisation and intent signals to show your prospects that you did your homework

Cold Calling Flow

1. Get to a question as fast as possible:

2. Qualify your prospects with relevant questions

- Show them you've done your research
- Present them with potential inadequacies in their current solution (or lack thereof)
- End with an open-ended, relevant question that keeps the conversation moving while helping you to qualify whether or not they are even a good fit

3. Move into the pitch

- Use a 20-30s elevator pitch:
- You must learn to think on your feet and adjust your pitch around what you learned in the opening conversation too
 - Let's say you learned they are a sales agency struggling to access quality leads. Using the above example, a more relevant, human pitch would sound something like this:

4. Handle objections (see the "3 Rs" [below](#))

5. Propose next steps

- Primary goal of the cold call is to set up a next step
- You can do so by making the ask and bundling it with a quick rundown of what the meeting would cover:

The "3 Rs" of Objection-Handling

1. Recognise their objection

- Make the prospect feel seen and heard
- You can do this really effectively through "mirroring" (as coined by Chris Voss in "Never Split the Difference"), where you repeat back the last few words a prospect said
- Example:
 - Prospect: "I'm not interested"
 - You: "You're not interested?"

2. Restate their objection

- Labelling is a helpful tool in which you give a verbal observation of a prospect's feelings
- Example:
 - Prospect: "Yes, I'm not interested because we already have a solution in place"
 - You: "Okay, I'm hearing you're currently happy with your vendor"

3. Redirect by proposing an alternative solution

- The goal here is to pivot to a solution-oriented approach and, hopefully, uncover more information in the process
 - **Do they already have a solution in place?** Redirect with: "What are you currently using? How long have you been using your current system?"
 - **Are they facing budget constraints?** Redirect with: "Do you currently use [tool or service] to [overcome challenge]?"
 - **Do they not have the time today?** Redirect with: "When would be the most convenient time for me to reach out to you?"

Multi-Channel Sequence

- You can weave together calls with voicemails with email for warmer cold calls and higher response rates:

3 Cold-Calling Scripts

1. The "Mic Drop Method" - Permission > Problem > Provoke > Promise

<p>Permission-based opener</p>	<p><i>"Hey {First Name}, I know you're not expecting my call. Do you have a moment? I promise to be brief."</i></p> <p>—</p> <p><i>Your version:</i></p>
<p>Frame a problem</p>	<p><i>"One of the things I hear often when speaking with other product leaders is that their management training is quite inadequate. Scenarios where you have ten hours of content shared and individuals responsible for the performance — but also health and well-being — of many people."</i></p> <p>—</p> <p><i>Your version:</i></p>
<p>Provoke the cost of inaction</p>	<p><i>"Curious — what does continued development look like for managers at {Company Name}?"</i></p> <p>—</p>

	<i>Your version:</i>
Key lesson from Florin	<i>Always ask an open-ended question to provoke the cost of inaction so that you open up a discussion. Closed-ended questions that result in "yes"/"no" answers kill your chances of getting meetings booked</i> — <i>Your version:</i>

2. The "One Quick Question"

3. The "Just Send Me An Email"

Team Coaching

- Apollo's data found that, of the sales leaders who hit or exceeded quota in 2022, **90%** reported that they frequently participate in and join sales calls

- To start a cycle of improvement across each individual on your team, there are three steps you can take:
 - i. Listen to at least 1 call per rep per week and take notes
 - Pay careful attention to:
 - Their tone and professionalism
 - Timing and delivery of their pitch
 - Objection handling and questioning
 - Their closing technique
 - ii. Give no more than 3 pieces of feedback
 - Giving too much feedback isn't productive, for both application and a rep's confidence
 - Consider your rep's experience and tenure as you deliver feedback
 - iii. Give feedback right away
 - Your reps are on the phone every day, and the longer you wait to give them advice, the less effective every dial will be. Be present and be proactive!

Social Selling

- LinkedIn is uniquely suitable for B2B lead generation and hundreds of millions of people who play a role in decision-making

- You can follow a simple posting framework:
 - 3-5 content topics, at least 2 of which are directly related to the problems your solution solves
 - Create 3 audience personas that align with your ICP
 - Create an infinite matrix of relevant things to talk about by switching out what you're talking about and to whom

- Your social selling framework

	Audience 1	Audience 2	Audience 3
Topic 1 <i>Problem #1</i>			
Topic 2 <i>Problem #2</i>			
Topic 3 <i>Industry Topic</i>			
Topic 4 <i>Personal Passion</i>			
Topic 5 <i>Company Related</i>			

3 Guidelines of Posting

1. Demonstrate credibility and be authentic
 - People gravitate towards authenticity
 - Your posts should document your failures and triumphs, what you've learned from your company and your prospects, and any tips or tricks that prove your expertise
2. Tell stories of your customer's success
 - When you share customer stories and success metrics, you can tease them by leaving something out
 - Present them with a blurry part of the photograph, a cliffhanger, a gap

3. Play the long game

- Consistently posting content that keeps you top-of-mind brings buyers to you at the moment they are ready to have that conversation
- When you play the long game, the timing works itself out

LinkedIn Engagement

- Engage with 3 groups of LinkedIn network:
 - i. Your prospects
 - ii. Your close personal network
 - iii. Your broader audience

Fill up the table below for your own tracking purposes:

Your Prospects	Your Close Personal Network	Your Broader Audience

- Leave thoughtful comments, not generic ones

LinkedIn Conversations

- There are 2 distinct types of prospects:
 - i. Inbound leads that come to you from your posts and comments
 - ii. Outbound direct messages you send directly to prospects
- For inbound leads, start the discovery process instead of selling the meeting
 - Example:



- From there, you can initiate to move the conversation off LinkedIn into email:

- For outbound leads:
 - Send personalised connection requests
 - Go back to voice notes, 1:1 videos, things that AI can't replicate yet
 - Look for opportunities where you or your company has extremely-relevant expertise, a positive track record, or existing relationships
- To increase the effectiveness, you want to warm up LinkedIn interactions with other touchpoints, which is where multichannel comes in 📌

Multichannel Outreach

- Multichannel increases your meeting booked rate significantly:

- Use sales sequencing tools to scale your efforts, but automate properly and intentionally

<p> DO automate</p>	<ul style="list-style-type: none"> • Basic follow-up emails • Some emails to Tier 3 prospects • Basic personalisation snippets • Workflows to cut down on repetitive tasks • Adding prospects to lists or sequences • Notifications when new prospects are found or reply • Updating contact and account statuses
<p> DON'T automate</p>	<ul style="list-style-type: none"> • Deep research of your Tier 1 or VIP prospects • Personalised emails to Tier 1 or VIP prospects • Unpersonalized, generic emails (just don't send them at all)

Sales Sequences for Tier 1 Prospects

- This is where you don't want to cut corners - automated touchpoints should be minimal (or none at all)

- Example multichannel sequence across 4 key channels:

- Sending gifts is a great way to differentiate yourself

- You can also invite prospects to an in-person event:

- Your own tier 1 sequence:

1	Day 1	<i>Send super-personalised email</i>
2	Day 1	<i>Like LinkedIn posts</i>
3	Day 4	<i>Call and voicemail</i>
4	Day 4	<i>LinkedIn connection message</i>
5	Day 7	<i>Email 2 (automated follow-up)</i>
6	Day 10	<i>Handwritten note of gift</i>
7	Day 23	<i>Super-personalised email (short version)</i>
8	Day 25	<i>Call and voicemail</i>

Sales Sequences for Tier 2 Prospects

- For tier 2, you should still dedicate some time and effort towards it

- The majority of that effort should go into writing a personalised first email, the rest you can rely on automation and multichannel touch points:

- Your own tier 2 sequence:

1	Day 1	<i>Automated email 1 (super-personalised)</i>
2	Day 1	<i>Call and voicemail</i>
3	Day 7	<i>Automated email 2</i>
4	Day 7	<i>Call and voicemail</i>
5	Day 16	<i>Automated email 3</i>

Sales Sequences for Tier 3 Prospects

- For tier 3, you can follow a similar structure to tier 2, without the effort of that first highly personalised email:

Optimise with A/B Testing

1. Send out your first sequence with **two to four email variants** and keep an eye on opens, click throughs, email interested rates, and reply rates. If the segment is small, start with an email that has worked in the past and test engagement

2. If you're getting below-average engagement (anything under 20% open rate, 4% reply rate, or 1% email interested rate) add an email variation — something that's completely different from the first email across subject line, body copy, and CTA
 3. According to Brendan Short, Apollo's Head of Product-Led Sales, statistical significance should start to appear **around 300 recipients**. Turn "on" the variant that performs the best
 4. Once you get a winner, start testing more granular variables in isolation. Keep the same format, but test subject line vs. subject line, CTA vs. CTA, etc.
 5. Use what you've learned about your specific audiences to inspire future messaging across your email copy
 6. Never stop testing and iterating
- Other best practices:
 - Apply at least 100 prospects per variation used
 - A/B test where you want to improve
 - Don't test too many templates at once
 - Test for either open rates or reply rates

Using Event-Triggered Data

- You can identify what account and contact-level triggers were most likely to signal a buyer-ready prospect:
 - Recent funding
 - Webinar attended
 - Email opened, clicked, or replied to
 - Website visited
 - Job changed or new promotion
- Based on defined roles, prospects are automatically added to sequences, routing them to multichannel campaigns based on the actions that they had taken or other specific triggers

- Here are some of the most impactful sales plays:
 1. Congratulate job changers on new role

2. Reach out to website visitors

3. Rebook meeting no-shows

- Your sales plays:

Play #1	Job Changers
When	<i>An account is saved or created</i>
If	<i>That saved contact recently 1) changed jobs and 2) has been in that role between 1-2 months</i>
Then	<i>Add them to "Job Changers" sequence</i>
Play #2	Website Visitors
When	<i>An account is created or updated</i>
If	<i>They have visited your website within the last X days</i>
Then	<i>Add them to "Website Visitors" sequence</i>
Play #3	Rebook Meeting No-Shows
When	<i>A meeting is cancelled</i>
If	<i>It's a saved contact</i>
Then	<i>Add contacts to a "rebook meeting no-show" sequence</i>

Measuring the Effectiveness of Your Outbound Sequences

- There are 3 types of metrics:
 - i. Input metrics - the measurable effort you're putting into outreach
 - ii. Quality metrics - the effectiveness of your touchpoints
 - iii. Output metrics - the quantifiable result of your outreach

- Here are some benchmarks to work towards:

Email Benchmarks (Rates per individual email)		
Open rate	Benchmarks Underperforming: under 20% Aim for: 25% Exceptional: +35%	Adjustments to make <ul style="list-style-type: none"> • Subject line • Preview text • General domain health audit (chapter six)
Reply rate	Benchmarks Underperforming: under 1%	Adjustments to make <ul style="list-style-type: none"> • Body copy

	Aim for: 3% Exceptional: 5%	• CTA
Click rate	Benchmarks *varies heavily based on email type and content Underperforming: under 2% Aim for: 2% Exceptional: +4%	Adjustments to make • Body copy • Adjust linking strategy
Bounce rate	Benchmarks Underperforming: +5% Aim for: under 2% Exceptional: under 1%	Adjustments to make • Verify your email addresses • General domain health audit (chapter six)
Call Benchmarks		
Connect rate	Benchmarks Underperforming: under 5% Aim for: +5% Exceptional: +10%	Adjustments to make • Verify your mobile numbers • Time of call
Callback rate	Benchmarks Underperforming: under 5% Aim for: 10% Exceptional: +25%	Adjustments to make • Call from local number • Voicemail script
LinkedIn Benchmarks		
Connections accepted rate	Benchmarks Underperforming: 15% Aim for: 30% Exceptional: 40%	Adjustments to make • Add or remove Inmail message • Targeting
Reply rate	Benchmarks Underperforming: 3.5% Aim for: 8% Exceptional: 10%	Adjustments to make • Messaging • Targeting • Try direct messages after connection vs. Inmails
Post engagement rate (based on engagement to follower ratio)	Benchmarks Underperforming: 1% Aim for: 2% Exceptional: 3%	Adjustments to make • Hook • Content reformatting (carousels, polls, etc.) • Discussion-starting CTA

Overall		
Conversion rate (contacted > customer)	Benchmarks Underperforming: less than .5% Aim for: 1% Exceptional: 2%	Adjustments to make • See above! Find the underperforming channel and tweak as needed.

Email Deliverability

- Spam filters are getting more sophisticated, analysed hundreds of data points to identify unwanted emails
- To avoid the spam folder, you need to be relevant to set up the right foundation for a good sender reputation
- To protect your main domain, you can set up a subdomain and a cousin domain:
 - Subdomain - this exists under the umbrella of your root domain
 - "knowledge.apollo.io"
 - Subdomains are treated as distinct entities when it comes to email deliverability, allowing for finer control over your sender reputation
 - Cousin domain - this is an entirely different domain where the naming is similar to your company's root domain
 - "apollomail.io"

- Here's the breakdown of what domains to use for which purposes:

Purpose	Example Domain	Relationship	Expected Engagement
Corporate emails Regular emails you send in the course of business, typically between co-workers, partners, etc.	apollo.io	1:1	High Recipient usually knows the sender personally
Transactional emails Customer communications triggered by user behavior such as password resets or order confirmations	notify@apollo.io	1:1	High Recipient typically expects the email based on the action taken
Marketing emails Promotional or educational emails such as newsletters or onboarding emails	news.apollo.io	1:Many	Variable Recipient has opted in to receive emails
Sales outreach emails Emails sent out to prospective clients	meetapollo.io	1:1 or 1:Many	Variable to low Recipient doesn't have an existing relationship with the sender — nor have they opted in
Custom tracking domains To track opens and link clicks	links.apollo.io	NA	Helps measure engagement on your emails

Authenticate Your Email Domains

- Email authentication tells email servers that **you are who you say you are**

- There are 3 key methods to email authentication:
 - i. **SPF (Sender Policy Framework)**. SPF verifies your identity as the sender. You tell mail servers which IP addresses are authorized to send emails on your behalf. If an IP address isn't listed in that record, the email might be flagged as spam
 - ii. **DKIM (Domain Keys Identified Mail)**. DKIM uses a cryptographic key to add a "digital signature" to your outgoing emails to make sure nothing has changed in transit from when you sent it to when it lands in your prospect's inbox
 - iii. **DMARC (Domain-based Message Authentication, Reporting, and Conformance)**. DMARC is like the cleanup crew if your emails don't pass the above. It tells the email servers to accept, reject, or quarantine messages from your domain that don't pass SPF or DKIM checks
- You can check out Apollo help docs around [SPF](#), [DKIM](#), and [DMARC](#), or use tools like [MXToolbox](#) and [aboutmy.email](#) to check the current health of your SPF, DKIM, and DMARC

Google & Yahoo's Email Sender Policy Changes

- The changes in early 2024 included that all senders must:
 - **Authenticate their emails**, specifically through [SPF](#) and [DKIM](#)
 - **Stay under a spam complaint rate of 0.3%** lest your domain gets permanently banned
 - **Validate their domain's domain name system (DNS) records** to ensure that your IP addresses are correctly pointing to your domain
- Anyone who sends more than 5,000 emails a day to personal email accounts have even stricter rules to follow:
 - In addition to SPF and DKIM, you have to **authenticate with DMARC**
 - On bulk sends, you must **include a one-click unsubscribe** in the email header and include a clear* unsubscribe link in the email body content

Best Practices for Scaling Outbound

1. Give people a clear path to unsubscribe
 - Making it hard to opt out of emails just means you're making it easier for your recipient to hit the spam button instead
2. Monitor deliverability with Google Postmaster
 - Google's [Postmaster Tools](#) are a free tool to help you monitor deliverability metrics, like spam rate, domain reputation, IP reputation, and more
3. Track opens and clicks
 - A click is one of the most powerful data signals you can get from any email campaign. It tells you how your campaign is performing and that your emails are actually wanted
 - Open tracking tells you whether or not people are opening your emails and it can be a powerful trend indicator to help you suss out if you're getting through
 - If you see a significant and lasting drop in your open rate, there's a good chance that you're having trouble reaching the inbox
4. "Warm up" your new domains
 - Wait a few weeks before sending any emails so you don't look like a trigger-happy scammer
 - Slowly increase the number of emails you send over a period of time
5. Set up sending limits to control volume of sends
 - Mimic the "regular person" email behaviour by setting limits for your mailboxes and campaign to gradually increase sends as you're building your sender reputation
6. Send relevant emails
 - Use your targeting framework to build out tight ICPs and personas

7. Personalise your content

- Use meaningful personalisation to increase the chances your audience feels that human-led one-to-one-ness
- Remember: the higher-value your prospect, the more manual your personalization should be

8. Monitoring your deliverability

- A quick checklist:

1	Check your spam rate regularly using Google's Postmaster Tools .
2	Monitor spam metrics in your engagement and email tools. Remember, even if they have spam reporting data, it will not include Google's data on recipients that have marked your email as spam. In Apollo, you'll see our spam reporting proxy in metrics that rely on email bounce data .
3	Keep an eye on your opens, clicks, reply rates, and meeting rates. If you're seeing drops in these across the board: pause sending, review your targeting and personalization, review your spam and reputation data, and resume after filters have cooled off — typically one to two weeks.
4	Use Postmaster Tools to monitor other key deliverability metrics, like domain reputation. Other helpful tools to check deliverability stats and do things like identify if you're on any IP blacklists include MxToolbox and GlockApps .

Debunking Deliverability Myths

- Myth #1: Don't put links, images, or HTML in your email
 - Spam filters aren't specifically looking for links — they are looking at **how the links impact your recipient's opinion of your message**
 - If MBPs see your link in a lot of spam complaints, then the link's domain can become a red flag to the filters

- Myth #2: Click-tracking flags you as spam
 - While certain tracking domains can get a bad reputation, the mere presence of a tracking link doesn't automatically put a message in the spam folder
 - Set up a custom tracking domain, and you can feel more secure that link-tracking won't damage your sender reputation
- Myth #3: Outreach tools tank deliverability
 - The platform enables you to schedule, automate, and create the email content, but is not actually sending on your behalf
 - While there are features and controls that may help or detract from good sender behaviour, the root issues of deliverability problems lie with how and what you send
- Myth #4: Using Mailgun and Sendgrid helps you get around sender requirements
 - Tools like Sendgrid are meant for large-volume senders. They play a huge role in the email ecosystem and may be a good fit for your business
 - But, if you're thinking of using these ESPs solely to try to skirt around sender requirements, understand that mailbox providers don't consider the source of email traffic when reviewing your messages and enforcing its limits
- Myth #5: Low conversation rates are because of bad deliverability
 - In fact, it's quite the opposite: **low engagement is the cause for bad deliverability**

Diagnosing Poor Outbound Performance

1	Is your outbound system set up properly with the correct authentication and configurations?
2	Have you been sending the same content at high volumes? Are there improvements to the messaging or to the targeting you can make? Refinements here can help both current deliverability and prevent future issues from arising.
3	Has engagement been declining overtime? It could be that your past sending behavior has caused deliverability issues that are now catching up to you.

Growing Your Sales Team

- If you're just starting out, you've got to do the job yourself to learn how to sell
- As you start to scale, you can choose between full-cycle sellers or a split team of SDRs + AEs
 - But the main issue with the SDR + AE model is it creates issues with incentives
 - If you just pay them per booked meeting, they have no incentive to book quality meetings. That may lead to your AEs wasting time with people who will never buy
 - If, on the other hand, you compensate them on revenue closed, that's bad for the SDRs. An SDR can't control what an account executive will do in a meeting

- The recommendation is to **make your first 3-5 hires a full-cycle salesperson**, with some exceptions
 1. You're venture-backed and have a mandate to grow at all costs
 - Throwing more resources at lead generation can help faster growth
 2. You have a ton of high-quality inbound leads
 - Hiring a team of SDRs to qualify these inbound leads before passing them along to an AE can be a good idea
 - Many inbound leads aren't ever going to buy from you, but some of them will - so you have to do something with them
 3. You sell something expensive to large enterprises
 - Big companies can be very demanding of their vendors, and never start with big contracts
 - That means you need a "land and expand" strategy where you land a small deal and grow it into something big over time
 - In this scenario, someone with a lot of knowledge and ability to get things done needs to manage your customer relationships, which means someone else needs to strategise their way into new accounts

Finding Strategic SDRs

- You need someone who can strategise *and* execute at a high level
- Instead, look for someone who's been in a closing role before and succeeded, and now wants to break into a new industry
- This is a hard job. They'll need to do real research on your prospects. They'll build org charts, carefully orchestrate their outreach, navigate gatekeepers, and generally pull out all the stops to get you a first meeting

Paying Your Sales Team

- It's important to make sure you're incentivising your team to do things that help the entire business
- A payment structure to consider is the **"Full-Cycle Selling" incentive model**:
 - A portion of an SDR's commission is tied to closed-won revenue
 - A portion of an AE's commission is tied to renewals
 - And a portion of a CSM's commission is tied to expansion or referral revenue
- But, it's important not to overdo this - the majority of your team's commission must be tied to **things they can directly control**:
 - For SDRs, a commission that's 80% based on meetings booked and 20% based on closed-won revenue may be a good starting point
 - For AEs, you might start with a 90/10 new revenue vs. renewal ratio
 - CSMs could follow a similar structure with 90/10 renewal vs. expansion or new revenue from referrals
- Experiment to find out what works best!
- Your incentive model:

Role	Incentive
SDR	- 80% based on meetings booked - 20% based on closed-won revenue
AE	- 90/10 new revenue vs. renewal ratio
CSM	- 90/10 renewal vs. expansion or new revenue from referrals

That's the end! If you want more content like this, I'm in the midst of creating:

If you want to be notified when we release them, you can join our newsletter below 📌



