

NEW BUSINESS DEVELOPMENT & SALES · TEMPLATE

Outbound Prospecting Planner

For founders, sales leaders and SDRs planning outbound that reaches the right accounts at the right time, without damaging the market.

How to use this: Work through the sections in order before your next sequence goes out. Build the profile from your best customers, not your hopes. Then run a small pilot of around thirty tier A accounts and use the review section after three weeks.

Ideal Customer Profile

Base this on the five to ten customers you would happily sign ten more of tomorrow.

Profile element	Our answer
Organisation type and size	
Trigger situation (what was happening when they bought)	
Current alternative (competitor, spreadsheet, nothing)	
Who feels the problem	
Who approves the spend	
Why they chose us over doing nothing	
Disqualifiers (who we will not pursue)	

Account Tiering Rules

Keep tier A small enough to research every account properly.

Tier	Definition for us	Research depth	Max accounts per person
A			
B			
C		Marketing nurture until a signal appears	

Timing Signals

List observable events that make our problem more pressing. Strike out any you can't explain in one sentence.

Signal	Why it makes the problem more pressing	Where we will find it

Account Research Brief

One per tier A account. Ten to fifteen minutes is usually enough. Check every fact before using it.

Account, contact and role

What they have said publicly about their priorities

What is likely making the problem worse for them right now

Our hypothesis, in one sentence they could confirm or correct

Who else is involved in the decision

Message Check

Tick each item before a first-touch message goes out.

- ☐ Opens with an observation about them, not about us
- ☐ Describes the problem in the words they would use with a colleague
- ☐ Includes a credible point of view or proof we can stand behind
- ☐ Ends with a low-friction question, not a calendar link
- ☐ Can be read on a phone in under 30 seconds
- ☐ No fake familiarity: no 'Re:' on a first email, no 'as promised', no 'just bumping this'

Sequence Plan and Stop Rules

Four to six touches over around three weeks. Every touch adds something new.

Touch	Day	Channel	What this touch adds
1			
2			
3			
4			
5			
6			

Stop rule: what ends the sequence (any reply, an opt-out, a request to stop)

Recycle rule: when a non-responder can be contacted again, and what new signal is required

Compliance Check: Australia and New Zealand

General information only, not legal advice. The rules that apply depend on where the people you contact are, so Australian and New Zealand law can both apply. Take advice before using bought data, sending at volume or prospecting into a new country. See acma.gov.au/avoid-sending-spam and dia.govt.nz/Spam-Three-Steps.

- ☐ We can show the basis for consent for every email contact: express consent, an existing relationship, or a conspicuously published work address where our message is directly relevant to their role
- ☐ No bought, scraped or harvested lists are used without consent we could rely on
- ☐ Every message identifies us and includes contact details that stay valid for at least 30 days
- ☐ Every message has a clear, free unsubscribe that works for at least 30 days and needs no login
- ☐ Unsubscribe and stop requests are actioned within five working days, in every tool we use
- ☐ Australian mobile numbers are checked against the Do Not Call Register before telemarketing calls
- ☐ Callers identify themselves and the business at the start of the call and keep to permitted calling hours
- ☐ We record where each contact came from and the basis for contacting them

Other countries we contact, and the local rules we have confirmed for each

Pilot Review

Complete after three weeks. Ignore open rates.

Measure	Result	What it tells us
Accounts sequenced		
Positive replies		
Meetings held		
Qualified opportunities created		
Opt-outs and complaints		
Bounces		

Which signals produced real conversations?

Which lines in the message did buyers respond to?

What will we change before the next batch?