



# *Revenue Infrastructure*

## GTM Automation Playbook

**25-50+**

MEETINGS/MONTH

**8-12**

WEEK BUILDOUT

**10K+**

TOUCHES/MONTH



**Subashis Guchait**

AI Architect & GTM Strategist

# What You Get

Complete demand generation infrastructure delivered in 8-12 weeks



## Outbound Engine

10-15 warmed domains, 10-15 mailboxes, multi-channel email + LinkedIn sequencing infrastructure



## Inbound Capture

Website visitor identification, form optimization, chatbot implementation with instant routing



## Paid Ads Infrastructure

Pixel setup, server-side CAPI, UTM architecture, and automated retargeting campaigns



## ABM Orchestration

Target account tiering, buying committee mapping, and coordinated multi-channel plays

# Expected Results

Performance benchmarks after full system deployment

**25-50+**

Meetings per Month

Target after Month 3

**45%+**

Email Open Rate

Industry avg: 20-25%

**\$2M+**

Pipeline per Quarter

Full attribution tracked

**3%+**

Reply Rate

**25%+**

LinkedIn Accept

**20%+**

ABM Meeting  
Rate

## RAMP-UP TIMELINE

**M1**

15-25



**M2**

20-35



**M3+**

30-50+

# How It All Connects



# Implementation Timeline

8-12 week buildout from kickoff to full deployment



● Weekly check-ins throughout

○ Each phase builds on previous

WEEK 0

# Pre-Engagement Discovery

Foundation-setting before the build begins

## KEY ACTIVITIES

1

### Executive Discovery Call

Understand business goals, ICP, sales process, and current tech stack

2

### Technical Audit

Review existing CRM, marketing tools, data quality, and integration points

3

### Architecture Design

Custom system blueprint based on your specific needs and goals

4

### Kickoff Workshop

Align stakeholders, set expectations, and finalize project timeline

## DELIVERABLES

- ICP Documentation
- Tech Stack Assessment
- System Architecture Doc
- Project Timeline
- Tool Access Checklist



**Duration: 3-5 days**

Before project kickoff

WEEK 1-2

# Outbound Foundation

Domain warmup and email infrastructure setup



## Domain Setup

10-15 secondary domains purchased and configured



## Mailbox Config

10-15 warmed mailboxes with professional signatures



## Platform Setup

Sequencing tools configured and integrated

### Domain Warmup Timeline

**Day 1-7**



**Day 8-14**



**Day 15+**

10 emails/day

25 emails/day

50+ emails/day



## LinkedIn Infra

Sales Navigator setup, connection automation, profile optimization

WEEK 2-4

# Inbound Capture + Paid Ads

Website visitor identification and advertising infrastructure



## Inbound Capture

### Website Visitor ID

De-anonymize 20-30% of website visitors into actionable contacts

### Form Optimization

Progressive profiling and enrichment-on-submit for higher conversion

### Chatbot Implementation

Qualification flows, instant routing, and meeting booking



## Paid Ads Infrastructure

### Pixel Implementation

Google, LinkedIn, Meta pixels with server-side CAPI

### UTM Architecture

Standardized naming conventions for complete attribution

### Retargeting Automation

Dynamic audience sync from CRM to ad platforms

WEEK 4-6

# Data Infrastructure + ABM

## Clay 6-Table Architecture

- 1 **Master Accounts** - Target companies
- 2 **Contact Discovery** - Decision makers
- 3 **Enrichment** - Multi-provider waterfall
- 4 **Signal Capture** - Intent + triggers
- 5 **Scoring** - Fit + engagement + intent
- 6 **CRM Sync** - Bi-directional updates

## ABM Orchestration

### Account Tiering

**Tier 1**

50-100

**Tier 2**

200-500

**Tier 3**

1000+

### Buying Committee Mapping

5 personas: Champion, Decision Maker, Influencer, Budget, End User

### Signal Capture Automation

Job changes, funding, hiring, tech installs, intent data

WEEK 6-8

# CRM Setup + Sequences

## CRM Configuration

### Lead Scoring Model

#### FIT

Industry, size

#### ENGAGE

Opens, clicks

#### INTENT

Signals

### Lifecycle Stages

### Multi-Touch Attribution

First touch, last touch, linear, and custom models

## Sequence Library (5-7 Built)

- Cold Outbound - New Prospects
- Warm Inbound - Form Fills
- Re-Engagement - Cold Leads
- Event/Webinar Follow-up
- ABM Tier 1 - High Touch
- Signal-Triggered Outreach

Channels:

WEEK 8-12

# Launch + Scale

Phased deployment and optimization

## Phased Launch Plan

1

### Dashboards Live

Executive, marketing, and sales views active

2

### Pilot Launch (25%)

Test with subset of target accounts

3

### Scale to 50%

Expand based on initial performance

4

### Full Deployment

100% of accounts, all channels active

## Optimization Focus

- A/B test subject lines and messaging
- Refine ICP based on response data
- Optimize send times and frequency
- Tune lead scoring thresholds
- Scale winning sequences

### Handoff Includes

Full documentation, training sessions, and ongoing support transition

# Outbound Engine Flow

From prospect list to booked meeting



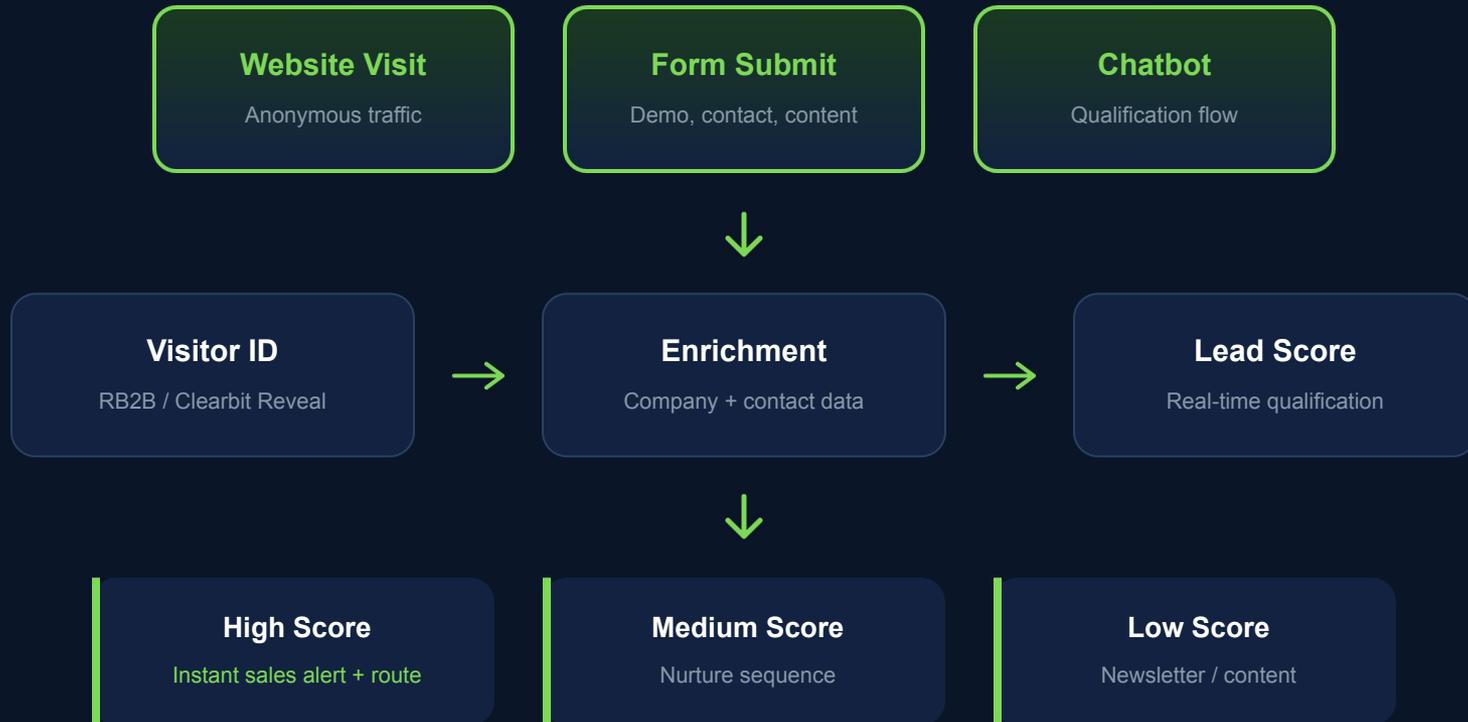
● 5K-10K touches/month capacity

● 45%+ open rate target

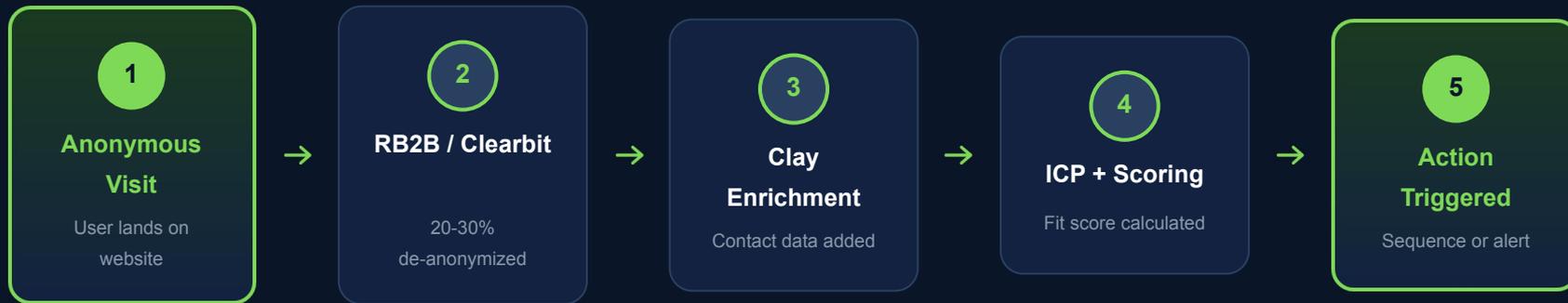
● 3%+ reply rate target

# Inbound Capture Flow

Website visitor to qualified lead in real-time



# Visitor-to-Contact Journey



## High Score

Instant Slack alert to sales

## Medium Score

Added to outbound sequence

## Low Score

Nurture or exclude

**Result:** Turn 20-30% of anonymous traffic into actionable contacts within minutes

# Paid Ads Integration



## Pixel Setup

Google, LinkedIn, Meta  
pixels installed



## UTM Architecture

Consistent tagging across  
all campaigns



## Server-Side (CAPI)

Bypass ad blockers,  
better match rates



## CRM Attribution

Full funnel tracking to  
revenue

## RETARGETING AUDIENCES

- Website visitors (7, 30, 90 day)
- High-intent page visitors (pricing, demo)
- Email engaged contacts
- ABM account lists (Tier 1, Tier 2)

## CONVERSION EVENTS

- Form submission
- Demo booked
- MQL created
- Opportunity created

# Clay 6-Table Architecture

## 1 Master Accounts

Central account registry with ICP scoring and tier assignment

## 2 Contact Discovery

Find decision makers and buying committee members

## 3 Enrichment

Waterfall enrichment for email, phone, and social

## 4 Signal Capture

Real-time intent signals from multiple sources

## 5 Scoring

Composite scoring combining fit, engagement, intent

## 6 CRM Sync

Bi-directional sync with HubSpot or Salesforce

Data flows: 1 → 2 → 3 → 4 → 5 → 6 → CRM

# Signal Capture System

## SIGNAL TYPES



### Job Changes

New role = new budget, fresh perspective



### Funding Rounds

Capital raised = spending incoming



### Hiring Signals

Team growth = tool needs



### Tech Installs

Complementary tools = fit indicator



### Intent Data

G2, review sites, topic research

## AUTOMATED RESPONSE

- 1 Signal detected in Clay
- 2 Contact enriched + scored
- 3 Routed to appropriate sequence
- 4 Personalized outreach sent
- 5 CRM updated with context

Signal-triggered outreach converts 3x higher than cold

# Account Tiering Model

Prioritize effort based on account value and fit

T1

## Tier 1

50-100 accounts

### HIGH TOUCH

- 1:1 personalized outreach
- Custom content creation
- Executive engagement
- Multi-thread required

20%+ meeting rate target

T2

## Tier 2

200-500 accounts

### MEDIUM TOUCH

- Semi-personalized sequences
- Industry-specific content
- Automated + manual mix
- 2-3 contacts per account

10-15% meeting rate target

T3

## Tier 3

1000+ accounts

### LOW TOUCH

- Fully automated sequences
- Template-based content
- Scale-focused approach
- 1 contact per account

3-5% meeting rate target

# Buying Committee Mapping

Multi-thread into accounts with 5 key personas



## Champion

Internal advocate who will sell on your behalf. Critical to identify early.



## Decision Maker

Final authority on purchase. Usually VP/C-level. May not be in every meeting.



## Budget Holder

Controls the purse strings. May be Finance or the dept head. ROI focused.



## Influencer

Trusted advisor whose opinion carries weight. Often technical lead or consultant.



## End User

Day-to-day user of the product. Can block deals if not bought in. Ease of use focused.

Multi-threading increases win rate by 30%+ vs single-threaded deals

# Lead Scoring Model

Three-dimensional scoring for accurate prioritization



## FIT SCORE

0-40 points

- Industry match
- Company size
- Tech stack
- Job title/seniority
- Geography



## ENGAGEMENT

0-30 points

- Email opens/clicks
- Website visits
- Content downloads
- LinkedIn activity
- Form submissions



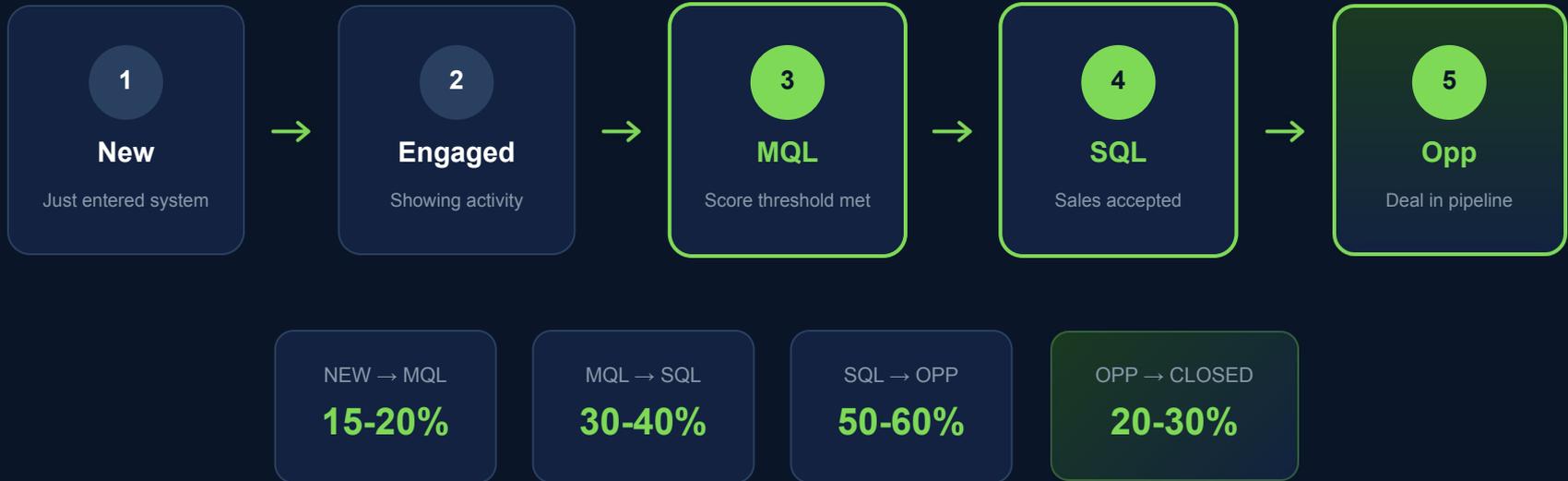
## INTENT

0-30 points

- Job change signal
- Funding news
- Hiring signals
- Tech install data
- G2/review activity

# Lead Lifecycle Stages

Clear progression from new lead to closed deal



# Multi-Touch Attribution

## First Touch

100% credit to first interaction.  
Shows awareness drivers.

## Last Touch

100% credit to final  
interaction. Shows closers.

## Linear

Equal credit across all.  
Balanced journey view.

## Custom

Weighted by your sales cycle  
priorities.

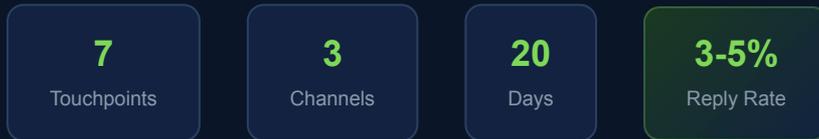
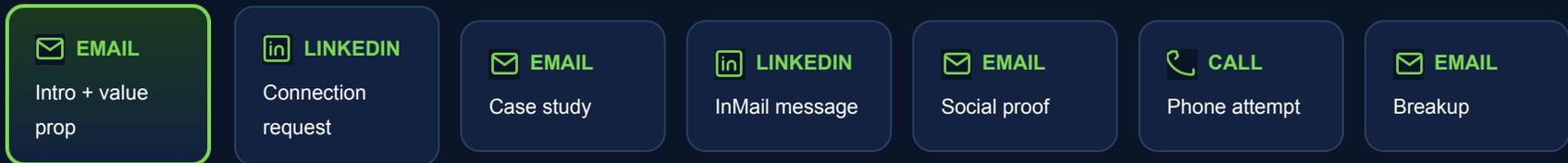
## TRACKED TOUCHPOINTS

- Email opens/clicks
- Form submissions
- Ad impressions
- LinkedIn engagement
- Content downloads
- Ad clicks
- Website visits
- Meeting attendance
- Chatbot interactions

## REPORTING OUTPUT

- Channel ROI
- Campaign performance
- Content effectiveness
- Sequence performance

# Multi-Channel Sequence



# Dashboard Suite

Real-time visibility for every stakeholder

## Executive

Pipeline value + velocity

Revenue attribution

Channel ROI summary

Forecast vs actual

## Marketing

Campaign performance

Lead flow by source

Content engagement

MQL conversion rates

## Sales

Meeting bookings

Pipeline by stage

Activity metrics

Rep performance

## Operations

Email deliverability

Sequence health

Data quality scores

System integrations

 Real-time data refresh  Customizable views  Automated alerts

# Tool Stack Overview

## DATA HUB

Clay

## ENRICHMENT PROVIDERS

## EMAIL

Smartlead  
Instantly

## LINKEDIN

Sales Nav  
Expandi

## INTENT & SIGNALS

## VISITOR ID

RB2B  
Clearbit Reveal

## FORMS

HubSpot  
Typeform

## CRM

HubSpot / Salesforce

## PAID ADS

## ANALYTICS & REPORTING

# Success Metrics

## Volume KPIs

Monthly touches	<b>5-10K</b>
Meetings booked	<b>30-50+</b>
MQLs generated	<b>100-200+</b>
SQLs created	<b>40-80+</b>

## Efficiency KPIs

Email open rate	<b>45-55%</b>
Email reply rate	<b>3-5%</b>
LinkedIn accept	<b>25-35%</b>
Reply → meeting	<b>30-40%</b>

## Revenue KPIs

Pipeline/quarter	<b>\$2M+</b>
Opp → closed won	<b>20-30%</b>
Avg deal size	<b>\$25-50K</b>
Sales cycle	<b>30-60 days</b>

Targets based on B2B SaaS benchmarks • Actual results vary by industry, ACV, and market conditions

# Monthly Performance Targets

**25-50+**

Qualified Meetings

Per month at steady state

**5-10K**

Monthly Touches

Email + LinkedIn combined

**\$2M+**

Pipeline Generated

Quarterly target

## EMAIL METRICS

Open Rate **45-55%**

Reply Rate **3-5%**

Bounce Rate **<2%**

## LINKEDIN METRICS

Accept Rate **25-35%**

Reply Rate **8-12%**

Profile Views **500+/wk**

## CONVERSION RATES

Reply → Meeting **30-40%**

Meeting → Opp **40-50%**

Opp → Closed **20-30%**

# Expected Ramp Timeline



# Ongoing Management

## W Weekly Tasks

- Monitor deliverability metrics
- Review sequence performance
- Process positive replies
- Add new prospects to sequences
- Update CRM records
- Dashboard review (30 min)

## M Monthly Tasks

- A/B test new messaging
- Refresh ICP criteria
- Update lead scoring weights
- Clean up stale data
- Performance report + analysis
- Quarterly strategy review

## TIME INVESTMENT

2-4

hours/week

1

day/month

System runs on autopilot after setup

# Why This Works



## Integrated System

Not just tools, but a fully connected engine where every piece works together



## Multi-Channel Reach

Email + LinkedIn + Ads working together multiplies your impact



## Signal-Driven

Reach prospects at the right moment with real-time intent data



## Full Attribution

Know exactly what's working and double down on winners



## Built to Scale

Architecture designed for 10K+ touches without manual work



## ABM-Ready

Multi-thread into accounts with buying committee targeting

# Engagement Model

## WHAT'S INCLUDED

- Full system build + configuration
- Domain + mailbox setup (10-15)
- 5-7 multi-channel sequences
- Lead scoring + lifecycle setup
- Dashboard suite (4 views)
- Full documentation + training
- Weekly check-in calls

## HOW WE WORK TOGETHER

1

### Discovery + Planning

Week 0: Deep dive into your business

2

### Build + Configure

Weeks 1-8: Infrastructure setup

3

### Launch + Optimize

Weeks 8-12: Go live and refine

4

### Handoff + Support

Training and transition



# Subashis Guchait

AI Architect & GTM Strategist

 LinkedIn

 Email

[Book a Call](#)

## WHAT YOU'LL GET

- ✓ 30-min discovery call
- ✓ Current state assessment
- ✓ Quick wins identification
- ✓ Custom roadmap outline

## BEST FIT FOR

- ✓ B2B SaaS companies
- ✓ \$25K-\$100K ACV
- ✓ Growth stage or scaling
- ✓ Sales team of 2-20

# Ready to Build Your Revenue Engine?

1

## Discovery Call

30 min to understand your  
goals and current state

2

## Custom Proposal

Tailored architecture and  
timeline for your needs

3

## Kickoff

Start building your revenue  
infrastructure

Let's talk:

[Schedule a Call →](#)

# Thank You

---

Let's build your revenue engine



**Subashis Guchait**

AI Architect & GTM Strategist

Revenue Infrastructure

GTM Engineering

AI Automation