

GTM PLAYBOOK

# Outbound Foundation

Build a working outbound email system generating qualified replies from target prospects.

**2-3 Weeks**

BUILDOUT TIME

**500-1K**

EMAILS/MONTH

**5-10**

MEETINGS/MONTH



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5+ years building AI-driven systems for B2B companies. Specializing in RevOps automation, HubSpot, and GTM infrastructure that drives revenue.

Detailed Process Guide

# Project Timeline Overview

From discovery to launch in 3 weeks

1

## INFRASTRUCTURE

Domain Setup  
Mailbox Creation  
Warmup Config

1-2

## TARGETING

ICP Build (Apollo)  
Clay Enrichment  
List Hygiene

2-3

## LAUNCH

Sequence Creation  
CRM Integration  
Go Live

✓ 3 Domains Configured

✓ 2-3 Warmed Mailboxes

✓ 2 Email Sequences

✓ CRM Integration

# Week 1: Infrastructure Build

Set up the technical foundation for deliverability

DAYS 1-5

STEP 1

## Domain Strategy

Purchase 3 secondary domains,  
configure DNS records



STEP 2

## Mailbox Setup

Create 2-3 mailboxes with profiles and  
signatures



STEP 3

## Warmup Config

14-21 day warmup to build sender  
reputation

### DNS CONFIGURATION

#### MX Records

Point to email provider

#### SPF Record

Authorize sending servers

#### DKIM

Email authentication key

#### DMARC

Start with monitoring mode

### PROVIDER OPTIONS

#### Google Workspace

\$6/user/month - Recommended

#### Microsoft 365

\$6/user/month - Alternative

### WARMUP SETTINGS

#### Start Volume

5-10 emails/day

#### Ramp To

30-40 emails/day over 14 days

#### Keep Running

Even after campaigns start

### PLATFORM SETUP

#### Sending Limits

50-75 emails/mailbox/day

#### Sending Window

8am-6pm recipient timezone

#### Throttling

60-90 seconds between emails

# Domain Strategy and Purchase

Protect your primary domain, use secondary domains for outbound

DAY 1-2

## NEVER USE PRIMARY DOMAIN

company.com should never be used for cold outbound to protect reputation

## NAMING PATTERNS THAT WORK

getcompany.com

companymail.com

trycompany.com

hellocompany.com

company.io

### Avoid These

Hyphens, numbers, weird TLDs (.xyz, .info)

## PURCHASE DETAILS

3

\$10-15

Domains Each/year

Registrars: Namecheap, Cloudflare, Google Domains

## DNS CONFIGURATION FLOW

1

### MX Records

Point to Google or Microsoft servers

2

### SPF Record

v=spf1 include:\_spf.google.com ~all

3

### DKIM

Generate in email provider, add TXT record

4

### DMARC

v=DMARC1; p=none; rua=mailto:dmarc@company.com

5

### Custom Tracking Domain

For Reply.io/Instantly link tracking

## Document Everything

Create a setup tracker spreadsheet with: domain, registrar, DNS provider, MX/SPF/DKIM/DMARC status

# Mailbox Creation and Warmup

Build sender reputation before sending cold emails

DAY 2-5

## Mailbox Creation

Day 2-3

### NAMING CONVENTIONS

#### Good

firstname@domain.com

first.last@domain.com

#### Avoid (Spam Flags)

sales@

info@

outreach@

### SETUP CHECKLIST PER MAILBOX

- ✓ Profile photo added
- ✓ Signature created (name, title, company)
- ✓ Recovery email configured
- ✓ 2FA enabled
- ✓ Connected to Reply.io/Instantly

## Warmup Configuration

Day 3-5 (runs 14-21 days)

### WARMUP TIMELINE

- Day 1**  
5-10 emails/day
- Day 7**  
15-20 emails/day
- Day 14+**  
30-40 emails/day

### WARMUP TOOLS

Reply.io - Built-in (included)

Instantly - Built-in (included)

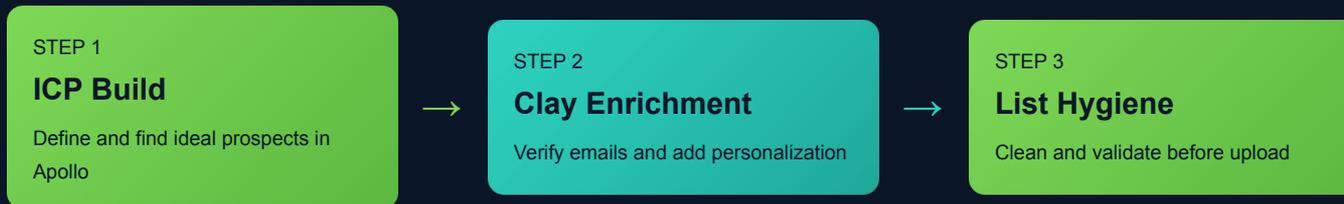
Standalone: Warmly, Mailreach (\$25-50/mo)

Watch For: Spam placement, bounce rate above 2%

# Week 1-2: Targeting and Enrichment

DAYS 5-9

Build your ideal customer list with verified, enriched contacts



## DATA FLOW PIPELINE



## ICP FILTERS

Industry, Employee count, Geography, Job titles, Seniority level

## ENRICHMENT ADDS

Verified email, Company info, AI personalization snippet

## HYGIENE REMOVES

Duplicates, Personal emails, Invalid emails, Competitors

## TARGET OUTPUT

**80-90%**

Survival rate from initial list

# ICP Build in Apollo

Define your ideal customer profile and build targeted prospect lists

DAY 5-7

## Company Filters

- 1 Industry/Vertical**  
SaaS, Healthcare, Financial Services
- 2 Employee Count**  
50-500, 500-1000, 1000+
- 3 Geography**  
US, UK, specific states/regions
- 4 Technologies Used**  
HubSpot, Salesforce, specific tools
- 5 Funding Stage**  
Series A, B, C (if relevant)

## Contact Filters

### Job Titles (Be Specific)

VP Marketing   Head of Growth   Director of Sales

### Seniority Level

Director, VP, C-Level

### Department

Marketing, Sales, Operations

### Exclude These Titles

Recruiters, Interns, Consultants

## TARGET LIST SIZE

# 1,000-2,000

Contacts in initial list for this playbook

## EXPORT MUST INCLUDE

- ✓ First name, Last name
- ✓ Email address
- ✓ Company name
- ✓ Title
- ✓ LinkedIn URL

## Pro Tip

Export test batch of 100-200 first, validate quality before full export

# Clay Enrichment and List Hygiene

Verify, enrich, and clean your list before uploading to sequencer

DAY 7-9

## Clay Enrichment Workflow

### INPUT COLUMNS

First Name Last Name Email Company LinkedIn

### ENRICHMENT STEPS

- 1 Verify Email**  
ZeroBounce/NeverBounce - remove invalid
- 2 Company Description**  
Pull from LinkedIn or website scrape
- 3 AI Personalization**  
One sentence about company/role

### OUTPUT COLUMNS ADDED

Verified Email Company One-liner Personalization Status

## List Hygiene Checklist

### REMOVE BEFORE UPLOAD

- ✗ Duplicate emails
- ✗ Personal emails (gmail, yahoo)
- ✗ Catch-all domains (risky)
- ✗ Missing critical fields
- ✗ Competitors (get exclusion list)
- ✗ Existing customers

### Document rejection reasons

Helps refine future Apollo searches

### FINAL QUALITY CHECK

**80-90%**

Survival Rate

Run test batch of 50 contacts first. Review output quality. Adjust AI prompts if snippets are generic.

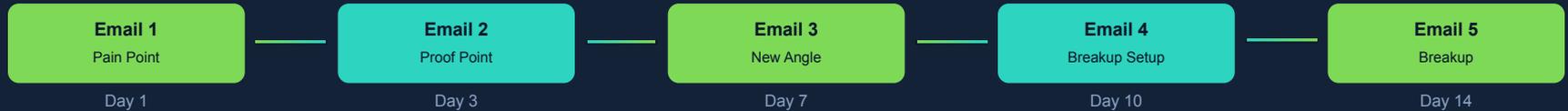
# Week 2: Sequence Creation

Craft compelling email sequences that drive replies

DAYS 9-12



## SEQUENCE TIMELINE (14 DAYS)



### MESSAGING DOC

One-sentence pitch, 3 pain points, 2 proof points, Primary and Secondary CTA

### BEST PRACTICES

50-75 words per email, short curiosity-driven subjects, soft CTA early

### QA CHECKLIST

Spell check, test merge fields, check links, unsubscribe present

### DELIVERABLES

2

Sequences for A/B testing

# CRM Integration and Lead Routing

DAY 12-13

Connect Reply.io to HubSpot for seamless lead management

## HubSpot Integration

### SYNC SETTINGS

- ✓ New contact on first email
- ✓ Activity logged per email
- ✓ Reply updates contact
- ✓ Meeting booked creates deal

### CUSTOM PROPERTIES

Sequence Name   Outbound Status   First Touch Date

## Lead Routing Decision Tree



### Test Full Flow

Send test email, reply to it, verify CRM updates and notifications

# Week 2-3: Launch

Pre-launch checklist, soft launch, and success metrics

DAY 14-16

## Pre-Launch Checklist

### Infrastructure

- DNS correct (SPF, DKIM, DMARC)
- Mailboxes warmed 14+ days
- Sending limits configured

### Targeting

- List uploaded and segmented
- Duplicates removed
- Existing customers excluded

### Sequences

- Client approved messaging
- Merge fields tested
- CRM integration connected

## Soft Launch Ramp

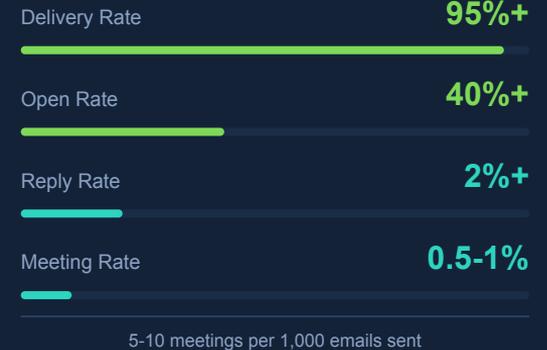
### GRADUAL VOLUME

- Day 1** 25-50 contacts/mailbox
- Day 2-3** 50-75 contacts/mailbox
- Day 4+** Full capacity (if healthy)

### Stop If You See

Bounce rate above 3%, spam complaints, open rate below 20%

## Success Metrics



# Ongoing Management

Monthly operations to keep your outbound machine running

ONGOING

## Weekly Tasks

- 1 Monitor Deliverability**  
Check bounce rates, spam complaints, domain health
- 2 Review Campaign Performance**  
Open rates, reply rates, meeting conversions
- 3 Process Positive Replies**  
Notify client, schedule follow-ups, update CRM
- 4 Add Fresh Contacts**  
Load 200-500 new contacts weekly to sequences

## Monthly Tasks

- Sequence Optimization**  
Refresh messaging, test new angles, retire underperformers
- List Refresh**  
Pull new contacts from Apollo, run through Clay enrichment
- Performance Report**  
Send monthly summary to client with metrics and insights
- Strategy Call**  
30-min monthly check-in to review and adjust

## Monthly Targets

|                  |           |
|------------------|-----------|
| Emails Sent      | 500-1,000 |
| Positive Replies | 10-20     |
| Meetings Booked  | 5-10      |

Results vary by industry, offer, and targeting quality

### Escalate Immediately

Sudden bounce spike, blacklist warning, major reply drop

## OUTBOUND FOUNDATION

# Ready to Launch?

**2-3**

Week Buildout

**500-1K**

Emails/Month

**5-10**

Meetings/Month

- ✓ 3 Domains
- ✓ 2-3 Mailboxes
- ✓ 2 Sequences
- ✓ CRM Integration
- ✓ Lead Routing



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