FALLS CITY
OUTBOUND

FREE GUIDE

The 8-Step Outbound Playbook

How to book qualified sales meetings yourself

This is the process we use at Falls City Outbound, written so you can run it on your own. It takes eight steps and about three weeks before your first email goes out.

STEP 1 Decide who to go after

You have two places to look for meetings: people who already know you, and people who have never heard of you. Look at both, then pick where to start.

First, the people you may have overlooked

Go through these five groups, warmest first, and write down every name you find:

1. **Past customers** who have not bought in a while.
2. **Deals that never closed.** Anyone you quoted or pitched who went quiet or chose someone else. Their situation may have changed.
3. **Old leads.** People who asked for information and never heard back, or stopped replying.
4. **Current customers.** Other locations or departments at the same company, and the people they would refer you to if you asked.
5. **Buyers who changed jobs.** Someone who bought from you before and now works at a new company.

These people get a short personal note, not the email sequence in Step 3. Keep it relaxed and do not ask for anything. For example:

> Hi [First name], you came to mind this week. How did [the thing they were working on] turn out?

A real question gets a reply, and the reply opens the conversation.

Second, new people you have not reached yet

These five places are where new customers usually come from. Go through each one and note which apply to you:

1. **Companies like your best customers.** Same industry, similar size, same area. If it worked for one, it likely fits the ones next to it.

2. **Your competitors' customers.** Look at the logos, case studies, and reviews on competitor websites. Those companies already buy what you sell.
3. **Companies where something just changed.** A new location, a new leader, a round of hiring, or a big contract win. Change creates new needs and new budgets.
4. **The market next door.** The next city or state over, or a nearby industry that has the same problem you already solve.
5. **Your network's network.** Suppliers, partners, and trade associations that serve the same buyer and can introduce you.

Then, pick your starting point

Count the names in your first list, and compare that with how many new companies you found in the second.

- **Start with people who know you** if you found 50 or more names. They reply faster and need less convincing.
- **Start fresh** if that list is short, or if you want a different kind of customer than you have had before.
- You can do both, but run one at a time so you can tell what is working.

Finally, describe your best customer

Whichever group you start with, write down one specific type of buyer before you contact anyone. A narrow target gets more replies than a broad one.

Answer these four questions in one sentence each:

1. **Who signs the deal?** Give the job title, not the department.
2. **What kind of company are they at?** Industry, number of employees, and location.
3. **What problem do they have that you fix?** Use the words they would use.
4. **Which of your current customers would you want ten more of?** Name them. Their shared traits are your target.

If your answer to question 2 fits more than a few thousand companies, narrow it.

STEP 2 Build your list

For new contacts, start with 300 to 500 people who match the buyer you described in Step 1. That is enough to learn what works without burning through your whole market.

- **Use a B2B contact database.** If your company already has ZoomInfo or a similar tool, use that. If you do not have one yet, a budget tool like Apollo is enough for a first list. Filter by job title, industry, company size, and location.
- **Only keep verified email addresses.** Unverified addresses bounce, and bounces hurt your sender reputation.

- **Check each company by hand.** Open the website for 30 seconds. Remove anyone who clearly does not fit.
- **Remove your current customers and anyone you are already talking to.**
- **Add one note per person** you can mention in the email: a new location, a recent hire, something on their site.

STEP 3 Write the three emails

Send three short emails over about a week. Their job is to introduce you and let the person know a call is coming, so your call is expected. Some people will reply before you ever dial.

Email 1, day 1: the introduction

> **Subject:** question about [their company]
>
> Hi [First name],
>
> [One sentence that shows you looked at their business.]
>
> We help [type of company] [specific result].
>
> I will give you a quick call on [day] to see if it is relevant. If email is easier, just reply here.
>
> [Your name]

Email 2, day 3: the heads-up

> Hi [First name], following up on my note from [day]. I will try you by phone [tomorrow or this afternoon]. If there is a better time, or a better person to speak with, let me know.

Email 3, day 7: after the call

> Hi [First name], I tried calling and missed you. [One new detail: a second benefit or a short example.] Is this worth a conversation, or should I close the loop?

Rules for all three

- **Keep it plain.** Text only. No images, attachments, or links in the first email.
- **Keep it short.** Under 90 words, readable in 15 seconds.
- **Write to one person.** It should read like a note from you, not a message to a list.
- **Keep your word.** Only promise a call you will make, and call on the day you said.
- **Stop when they answer.** The moment someone replies, take them out of the sequence and respond yourself.

STEP 4 Send without landing in spam

1. **Never send cold email from your main domain.** Buy a separate, similar domain. If it gets flagged, your everyday email keeps working.
2. **Set up the three sender records:** SPF, DKIM, and DMARC. Your email provider has a setup page for each. They prove the email really came from you.
3. **Warm the new inboxes for 14 to 21 days** before sending anything. A warmup tool sends and answers small amounts of email automatically to build a reputation.
4. **Keep volume low.** About 30 emails per inbox per day. To send more, add inboxes, not volume.
5. **Include your business name, a mailing address, and a way to opt out** in every email, and honor opt-outs right away. In the US this is required by law.
6. **Send on weekday mornings** in the recipient's time zone.

STEP 5 Write your call script and test it

A script keeps you from rambling and lets you compare one call with the next. Write it before you dial.

What the script needs

1. **An opener** that says who you are and mentions your email.
2. **One sentence on the result** you deliver.
3. **Two or three questions** that show whether they have the problem you fix.
4. **An answer for each common objection.** At minimum: "not interested", "send me an email", "we already have someone", and "call me later".
5. **The ask:** a specific day and time for a 15 minute meeting.

Keep the call simple

The person should hang up thinking your service will make their days easier or make them more money. They should not hang up thinking about the work it would take to buy your product or use your service.

- **Talk about the outcome.** More revenue, time back, or a headache gone.
- **Leave out how it works.** Setup, process, and anything they would need to do to get started can wait for the meeting.
- **Make one point.** Several points give them more to weigh and a reason to put it off.
- **Use everyday words.** If you would not say it to a friend, cut it.
- **Ask for one thing:** the meeting.

Test it before you call your best contacts

Call a small batch of lower-priority contacts from the same kind of company first. Use those calls to find where the script stalls and which objections come up most. Fix the script, then start on the people you most want to reach.

STEP 6 Make the calls

Call everyone whose email did not bounce. Your emails said a call was coming, so treat every call as expected. Use the script you wrote and tested in Step 5, and open by mentioning your email.

Rules

- Call on the day your email said you would.
- Call business lines during business hours.
- Check the Do Not Call rules that apply to you before calling mobile numbers.
- If they say no, thank them and take them off your list.
- Leave one short voicemail at most, then send Email 3.

STEP 7 Decide what counts as a qualified meeting

Write the definition down before the first meeting is booked, so you count real opportunities and not just calendar entries.

A meeting is qualified when all four are true:

1. The person can make or strongly influence the buying decision.
2. Their company matches the target you wrote in Step 1.
3. They have said they want to talk about the problem you fix.
4. There is a confirmed time on your calendar.

If someone misses the meeting, offer one new time. If they miss twice, move on.

STEP 8 Track your numbers and adjust

Check these numbers once a week. When one is low, change one thing, give it a week, and check again. **Changing several things at once hides which change worked.**

Number	What it tells you	If it is low
Emails sent	Whether you are doing the work	Add inboxes or load more of the list
Bounce rate	Whether your list is clean	Keep it under 3%. Above that, re-verify the list
Email replies	Whether the message fits the audience	Rewrite Email 1 or narrow the target
Calls made	Whether you are keeping the promise in your emails	Block out calling time on your calendar
Conversations	Whether you are reaching people	Call at different times of day, or get better phone numbers
Meetings booked	Whether conversations turn into calendar time	Rework the script: the opener, the questions, or the objection answers
Meetings held	Whether people show up	Send a reminder the day before

If you would rather not do this yourself

Done properly, this is a full-time job. A working outbound program means hundreds of calls a week on top of the emails, the list building, and the script testing. If your time is better spent closing, we run the whole process for you and put qualified meetings on your calendar.

See what a meeting is worth to your business with the calculator at **fallscityoutbound.com**, or email **brennon@fallscityoutbound.com**.

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