

Outreach 101

The complete guide to getting started with Outreach.



Provided by  **Spekit**

Spekit Main Prod Org



February 25, 2020

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1. Add Salesforce Leads to Sequence in Outreach

Last edited by [Najam Ansari](#) on January 28, 2020

Spek

Expert

RB [Rees Bayba](#)

Definition

Steps to Import Salesforce Leads into Outreach for Sequencing

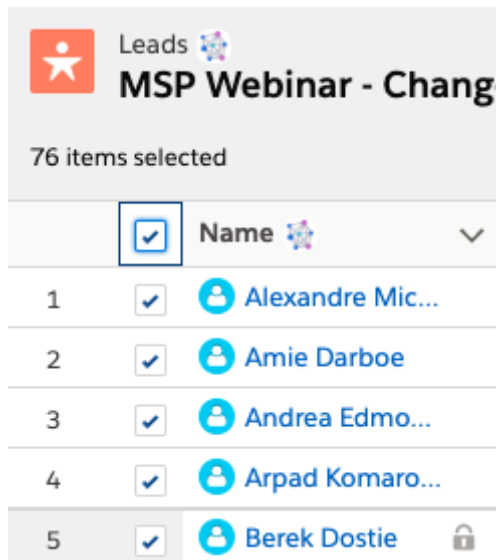
1) Located desired leads in a List View in Salesforce

The screenshot shows a Salesforce list view for 'MSP Webinar - Change in Salesforce'. The list contains 20 items, each with columns for Name, Title, Email, Phone, Company, Lead Source, and Lead Source Detail. The 'Lead Source' for all items is 'Webinar'.

	Name	Title	Email	Phone	Company	Lead Source	Lead Source D...
1	Alexandre Mic...	Business Development Engineer	amichaudmorasse@pro...		Progesys	Webinar	Driving Adoptio...
2	Amie Darboe	Community & Sales	amie.darboe@mindsdb...		MindsDB	Webinar	Driving Adoptio...
3	Andrea Edmo...	Director of Sales Operations	andrea.edmonds@risks...		RiskSense	Webinar	Driving Adoptio...
4	Arpad Komaro...	Salesforce Admin	arpad.komaromi@com...		ComplyAdvantage	Webinar	Driving Adoptio...
5	Berek Dostie	Account Executive	bdostie@insourcess.com		InSource Solutions	Webinar	Driving Adoptio...
6	Brendan Hugh...	Manager, Sales Development	brendanhughes@upser...		Upserve	Webinar	Driving Adoptio...
7	Chad Horenfel...	VP	chad.horenfeldt@gmail...		Updater	Webinar	Driving Adoptio...
8	Colin Illar	Marketing Operations Manager	colin.illar@transitscr...		TransitScreen	Webinar	Driving Adoptio...
9	Crystal Black	Director of Marketing	crystal.black@bigfinte.c...		Bigfinte	Webinar	Driving Adoptio...
10	Danita Fleck	Senior Manager Marketing Operations	danita.fleck@gigamon.c...		Gigamon	Webinar	Driving Adoptio...
11	Eugene Craig	Global Security Operations Chief	eugene.craig@uspsector...		Perspecta	Webinar	Driving Adoptio...
12	Josh Stanton	General Manager	josh.stanton@cemplicity...		Cemplicity	Webinar	Driving Adoptio...
13	Katie Vahle	CCO	katie@carevoyance.com		Carevoyance	Webinar	Driving Adoptio...
14	Mael Bredeche	Sales	mael.bredeche+eventbr...		Sales	Webinar	Driving Adoptio...
15	Max Hart	Account Executive	maxwell.hart@canpang...		Canpango	Webinar	Driving Adoptio...
16	Michael Griffin	Enterprise Sales	michael.griffin@formsta...		Formstack	Webinar	Driving Adoptio...
17	Phoebe Farber	Sr Revenue Operations Manager	phoebe.farber@threats...		Threat Stack	Webinar	Driving Adoptio...
18	Rob Janke	Sales Operations Manager	rob.janke@medbridge...		Medbridge	Webinar	Driving Adoptio...
19	Robb Finkelste...	Director of Revenue Operations	rfinkelstein@shipbob.co...		ShipBob	Webinar	Driving Adoptio...
20	Edna Silt	Customer and District Marketing Manager	esilt@business.com		Mass	Webinar	Driving Adoptio...

2) Apply filters to the List View so only the Leads you want to sequence appear in the list.

3) Click to **Select All Leads** or Select the ones you want to Sequence



4) Select "Import to Outreach"

5) Your Outreach will popup. **Select the first Prospect** in the list and then **select "Select All Items"**

6) Finally, click the three dot symbol shown below, choose **Sequence** and decide which Sequence you want to place your prospects in.

2. Dreamforce 2019 Post-Conference

Last edited by [Najam Ansari](#) on January 28, 2020

Spek

Expert

Aa Assign an Expert

Definition

Instructions for using this sequence:

- View Salesforce list of all leads here: List in Salesforce
- View Google Sheet with leads [here](#)
- Add to sequence from SFDC, create customized first paragraph.
- If high-priority lead or good stuff on LI profile, add personalization

To watch keep an eye on:

- If the prospects engages with our emails (views, link clicks) then add call them and add them on LinkedIn with personalized messaging

3. Outreach Snippets

Last edited by [Najam Ansari](#) on January 28, 2020

Spek

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Definition

Desired Outcome:

Are you free tomorrow or Wednesday to discuss? or here's a link to my calendar if it's easier to schedule this way.

Formula:

Are you free `{{#if is_monday}}`tomorrow or `{{weekdays_from_now 2}}{/if}}``{{#if is_tuesday}}`tomorrow or `{{weekdays_from_now 2}}{/if}}``{{#if is_wednesday}}`tomorrow or `{{weekdays_from_now 2}}{/if}}``{{#if is_thursday}}`tomorrow or `{{weekdays_from_now 2}}{/if}}``{{#if is_friday}}``{{weekdays_from_now 1}}` or `{{weekdays_from_now 2}}{/if}}` to discuss? or here's a link to my calendar if it's easier to schedule this way.

4. Prospects

Last edited by [Najam Ansari](#) on January 28, 2020

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Definition

A definition