Outbound Sequencing for Founders

A ten stage guide to your first outbound motion, from market to handoff.

For: Founders who need their first outbound motion

As of October 26, 2026

A missionary account executive (AE) is usually a customer's first introduction to a product. The job is to define the target customer, prove it with the buyer's own data, and build champions who carry it inside the company. A champion is the buyer who pushes for you inside their company.

An account doesn't move to the next stage until its test is met. That one rule keeps a thin pipeline honest. Each stage ends with a **Ready when:** test.

In This Guide

Part	What it holds
What You Need	Tools, inputs and people to line up first.
Research	The sourced numbers behind the stages.
Step by Step	Ten stages, the quarterly loop and four sequences.
Troubleshooting	Common problems, likely causes and fixes.

What You Need

Line these up before you start. Each stage in Step by Step names the tools it uses.

Tools

Layer	Tools	What it does
System of record	Salesforce, HubSpot	Design the objects, fields and stage rules. Set who owns what.
Scoring and routing	HubSpot, Supabase	Score accounts and send the hot ones to a named owner.
Signals and lists	Clay, Apollo, ZoomInfo, LinkedIn Sales Navigator	Find the accounts and the trigger. Write both back to the CRM.
Sequencing	HubSpot Sequences, Outreach, Salesloft	Build the cadence. Stop it the moment someone replies. Log every touch.
Call capture	Gong, Fireflies	Tag the stated problem. Collect the words buyers use and feed them back into messages.
Shared plan	A shared document or a deal room tool	Write the plan with the buyer, with dates and owners on both sides.

Mayberry Advisory has no partnership with any OEM (original equipment manufacturer) vendor.

Inputs

- CRM history, call recordings and one spreadsheet for the market work.
- Ten buyer conversations, held before you write any outreach.
- Public buyer material: annual reports, job posts, conference agendas, public procurement notices.
- Closed-lost deals, mined for the exact phrases buyers use.
- A CRM with fields for tier, trigger and owner.

People

- One seller, the missionary AE, who owns each account.
- Marketing, who signs the lead definition with sales.
- An engineer, who checks technical answers and joins the handoff call.
- A deal desk (the team that issues quotes and checks terms) and customer success.

Time

Plan for a quarterly loop. Each pass runs about 30 days, and the second pass runs two quarters after the first. Set Tier 1 by how many accounts one seller can research by hand.

Research

Each claim traces to its source. Where the source is thin, this guide says so.

Finding	What it says	Source and strength
About 5% of a market buys in a quarter	If companies change providers about every five years, roughly 20% are in the market in a year and about 5% in a quarter. A two year cycle gives about 50% a year and 13% a quarter.	Professor John Dawes, Ehrenberg-Bass Institute for Marketing Science, for the LinkedIn B2B Institute. A model with a stated assumption. The author calls it a rule of thumb, not a precise law. It doesn't measure your market.
Speed decides who wins a raised hand	Most companies don't respond to online sales leads nearly fast enough.	Oldroyd, McElheran and Elkington, "The Short Life of Online Sales Leads," Harvard Business Review, volume 89, issue 3, 2011. Only the abstract finding is cited. The numbers are behind a paywall.
Sellers spend 40% of the week selling	In a survey of 4,050 sales professionals in 22 countries, reps spent 40% of the workweek selling. Teams without an all-in-one platform used an average of eight tools, and 42% of reps said they were overwhelmed by tool count.	Salesforce, State of Sales, seventh edition, 2026, surveyed August to September 2025 (pages 3, 8 and 16). A self-reported vendor survey. No publication date is printed in the report.
Triggers are public and dated	Drupal 7 support ended on January 5, 2025. Drupal 10 reaches end of life on December 9, 2026. A dated vendor end of life is one example of a trigger you can test with buyers.	Drupal.org, core release schedule. A first-party fact from the project itself, not an estimate.

What This Means for the Loop

Most accounts that said nothing in quarter 1 weren't wrong. They were early. Two quarters is the default gap here. It's long enough for a budget or a project to move and short enough that the first conversation isn't forgotten. Tune it with your own data.

A seller won't remember to revisit a list from two quarters ago. The record has to. The Salesforce survey is self-reported, so treat it as a signal and not a measurement of your team.

Further Source

Peter Weinberg and Jon Lombardo, LinkedIn B2B Institute, "The 95:5 Rule Is the New 60:40 Rule," Marketing Week, September 2, 2021. An opinion piece that summarizes the Dawes study. Its authors work for the institute that commissioned the study, so it's used only to show how the idea is explained to marketers. Facts were read October 21, 2026.

Step by Step

Run the ten stages in order. Use each one as a checklist at the start and again when you review the pass.

Stage 1: Market Analysis

Learn how buyers think, in their words, before you write a single message.

Steps

1. Write five questions: who feels the pain, what they do today, what event makes it hurt, who signs, and what it costs to ignore.
2. Hold ten buyer conversations before you write any outreach. Ask for a learning call, not a demo.
3. Read what buyers publish: annual reports, job posts, conference agendas, public procurement notices.
4. Mine closed-lost deals and call recordings for the exact phrases buyers use.
5. Write the one-page market brief.

Documents: A one-page market brief. A buyer language sheet with the exact phrases.

Tools: CRM history, call recordings, Clay or ZoomInfo for lists, one spreadsheet.

Number to track: Calls held, conversion rates, click-through rates and engagement health.

> **Ready when:** You can say in one sentence who has the problem, what triggers a buy, how they cope today and what it costs.

Stage 2: Customer Segmentation

Decide who gets hand-written work, who gets a template, and who gets nothing yet.

Steps

1. Write the fit rules, such as organization type, size and platforms in use.
2. Add the trigger as its own field, with a date and a source.
3. For each Tier 1 account, map three people: the signer, the champion candidate and the technical reviewer.
4. Assign one owner per account.
5. Review the tiers monthly. Move accounts up when a trigger appears.

Tier	Who	Example size	How to work them
Tier 1	Right fit, and a trigger is live now.	About 30 accounts	Hand-written messages. Four channels. Three contacts mapped per account.
Tier 2	Right fit, no trigger yet.	About 150 accounts	Template with one custom line. Two channels. Watch for a trigger.
Tier 3	Loose fit.	The rest	Inbound and the slow cadence only. No seller time.

Counts are planning assumptions. Set Tier 1 by how many accounts one seller can research by hand.

Documents: The account list with tier, trigger, owner and contact map.

Tools: CRM fields for tier, trigger and owner. Clay or Apollo to fill in contacts.

Number to track: Share of Tier 1 accounts with three mapped contacts.

> **Ready when:** Every Tier 1 account has a trigger note and three mapped contacts.

Stage 3: Marketing Qualified Leads

Write a rule for when a lead is worth a seller's time, and how fast the seller must act.

Steps

1. Write the definition on one page. Sales and marketing both sign it.
2. Split the score into fit (can they buy) and interest (did they act).
3. Set the speed rule: a seller reaches out within one business day.
4. Route by score to a named owner. No shared queue.
5. Review rejected leads every week. Change the rule when sellers keep rejecting the same kind.

A marketing qualified lead (MQL) is a lead whose score says it's worth a seller's time. The points below are examples. A lead at 60 or more is an MQL.

Type	Signal	Points
Fit	The account is Tier 1 or Tier 2.	30
Fit	The title is head of the product's owning team, director of digital, or CIO.	20
Interest	They reply to outreach.	40
Interest	They fill in the inventory worksheet.	25
Interest	They visit the pricing page twice.	15

Tune the points after you see which leads become meetings.

Documents: The signed definition. The lead source and the asset that created the lead, on every record.

Tools: HubSpot scoring or Salesforce rules.

Number to track: Marketing qualified lead to meeting rate, and hours to first touch.

> **Ready when:** A score sends a lead to a named owner, with the source and the asset attached.

Stage 4: Inbound

A missionary product gets little search traffic, so you make the reasons for buyers to raise a hand.

Steps

1. Write the overview note: a one-page description of what changes when a team adopts your approach.
2. Build the inventory worksheet. The buyer lists every item in scope with its platform, version, owner, last update and who has admin access.
3. Record a 90 second video that shows what a one-view look at the buyer's setup reveals.

4. Host a small roundtable of leaders from Tier 1 accounts.
5. Have each seller post weekly about the problem, in their own voice.

The worksheet is often the best asset. The buyer writes the list, so the buyer sees the problem. Nobody argues with a list they wrote.

Documents: An asset map: which asset serves which stage and which person.

Tools: HubSpot forms and landing pages. Tracked links that write to the CRM. LinkedIn.

Number to track: Inbound leads per month from Tier 1 and Tier 2 accounts.

> **Ready when:** Every asset has a tracked link and a follow-up rule.

Stage 5: Outbound

Give each channel one job, and put them in order.

Steps

1. Pick the channels for each tier, using the table below.
2. Follow the rules of repetition on every retry.
3. Log every touch with its channel, date and outcome.
4. Review the replies and the silences every week. Rewrite the weakest touch.

Channel	Its job	The rule
Email	Makes the case in writing.	One idea per message. A question or an asset in every one.
Phone	Gets a live answer.	Call at two different times of day. Keep voicemails to 20 seconds.
LinkedIn	Puts a face on the name.	Connect first with no note. Pitch later, if at all.
Warm route	Asks someone for a name.	Make the ask small. A name, not a meeting.
Video	Shows you did the work on their situation.	90 seconds. Their public facts only.
Roundtable	Puts peers in a room.	Peers talk. The seller listens and hosts.

Rules of Repetition

- Every touch gives a new reason to read it. Never write "just checking in."
- Change the channel and the time of day on each retry.
- Stop the sequence the moment anyone replies or books a meeting.
- Log every touch with its channel, date and outcome.
- Review the replies and the silences every week. Rewrite the weakest touch.

Documents: A touch log in the CRM. A reply code on each record: interested, not now, wrong person, never.

Tools: HubSpot Sequences, Outreach or Salesloft, the dialer, LinkedIn.

Number to track: Meetings booked per 100 Tier 1 and Tier 2 contacts worked.

> **Ready when:** A meeting is booked, or the record is closed with a reason and a return date.

Stage 6: Discovery

Find the one or two outcomes the buyer must deliver this year, and show how the current way of working puts them at risk.

Steps

1. Build the brief from the CRM, past calls, news and the org chart.
2. Send a short agenda two days ahead.
3. Ask what the buyer must deliver this year. Listen for the words they use.
4. Walk through the current process step by step. Size the cost with the buyer, in the buyer's numbers.
5. Name who else must say yes.
6. End with a dated next step. Send the recap within the hour.

Try this question: ask the buyer to walk through the last time an update went wrong. Then count the items together. The count is the cost.

Documents: A discovery record: trigger, current process, cost, outcomes, buying committee, next step. The shared plan, opened on this call.

Tools: Call capture, CRM, shared document.

Number to track: Discovery calls with three or more contacts mapped.

> **Ready when:** A champion is named, the cost is estimated in the buyer's numbers, and the next step has a date.

Stage 7: Proposal

For a new category, start small: a pilot on part of the buyer's setup, with written success metrics and a path to the rest.

Steps

1. Walk the draft through with the champion before you send it.
2. Write the success metrics in the buyer's words.
3. Write the terms so the pilot moves to a full agreement when the metrics are met.
4. Add the price and the timeline for the technical and security review.
5. Name who signs and by when.

Documents: The proposal. The success metric sheet. Answers to technical questions from the approved answer library, checked by the engineer.

Tools: CRM quote, deal desk, shared document.

Number to track: Days from discovery to proposal. Share of proposals with written success metrics.

> **Ready when:** The champion confirms in writing that the success metrics are right.

Stage 8: Close

Long deals die in paperwork and in silence. The shared plan keeps both in view.

Steps

1. Confirm every date in the shared plan with the champion.
2. Start legal and procurement early, in parallel.
3. The VP calls the executive sponsor. Only the VP can have this one.
4. The deal desk issues the quote. It must match the order form.
5. Get the signature. Update the CRM the same day.

Documents: The signed order form. The final version of the shared plan.

Tools: CRM, e-signature, deal desk.

Number to track: Days from proposal to signature. Close dates that slipped.

> **Ready when:** The signed order form is attached to the deal.

Stage 9: Booked

A deal isn't won until the paper, the quote and the billing agree.

Steps

1. Attach the order form to the account.
2. Check that the quote, the order form and the first invoice show the same price and dates.
3. Copy the success metrics into the account record.
4. Create the renewal date.
5. Mark the deal closed won only when every item is done.

Documents: A booking checklist, signed off by the seller and the deal desk.

Tools: CRM and the billing system.

Number to track: Bookings with no error at the first invoice.

> **Ready when:** The booking checklist is complete with no open items.

Stage 10: Handoff to Customer Success

The buyer shouldn't have to explain the deal twice.

Steps

1. The seller writes the handoff record within one business day of signature.
2. Hold the handoff call within three business days: seller, customer success, engineer and the champion.
3. Write down every promise the seller made.
4. The seller stays involved for the first 30 days.
5. Send usage data back to the seller, so the renewal holds no surprises.

Documents: The handoff record holds: why they bought, the one or two outcomes the buyer must deliver this year, who is involved and their roles, what was promised, the success metrics, technical needs, known risks and key dates.

Tools: The CRM account record, an onboarding checklist, product usage data.

Number to track: Days from signature to first live use.

> **Ready when:** A customer success owner is named and has met the champion.

The Quarterly Loop

In any quarter, about 5% of your market is buying. So the work is a loop: run a sequence, learn what works, use what didn't as an iterative process, and keep trying new angles.

Quarter	What you do
Quarter 1	Run the full sequence on every account that qualifies.
Quarter 2	Stop selling to the accounts that didn't answer. Watch for triggers and fix bad contacts.
Quarter 3	Send each account back through with a new angle, a new person and a new asset.
Quarter 4	Sort every account into an outcome. Rewrite the weakest messages. Start again.

> **Ready when:** Every account has an outcome, a reason and a return date at the end of quarter 4.

The Four Sequences

Each sequence stops the moment the contact replies or books a meeting. Fill the trigger and asset names from your own market work. Log every touch with its channel, date and outcome.

Sequence 1: The Champion

Eleven touches in 30 days across four channels, aimed at the head of the team that owns the problem at a Tier 1 account. The buyer isn't looking, so the sequence earns attention before it asks for time. Lead with a valuable insight and how it affects key business outcomes.

Day	Channel	The touch
1	Email	State the dated trigger. Ask how many of their systems it touches. One question. No pitch.
2	LinkedIn	View the profile. Send a connection request with no note.
4	Phone	Call. If no answer, leave a 20 second voicemail.
6	Email	Send the one-page overview note. Three lines of body.
9	LinkedIn	Comment on a post of theirs, or send one line tied to a trigger such as a job post or a redesign.
12	Email	Offer the inventory worksheet: list every item, its platform and version, owner, last update, and who has admin access.

Day	Channel	The touch
15	Phone	Call again at a different time of day.
18	Email	Send a 90 second video built on what is publicly visible about their setup.
22	Warm route	Ask who owns the day-to-day updates: the internal team or an agency. Or ask a mutual contact for an introduction.
26	Email	Close the loop. Ask if this should go to someone else.
30	Phone and CRM	Final call. Then set an outcome and a return date. Then the slow cadence until the return date.

Sample Messages

Day 1 email. Subject: {Trigger date}. How many of your systems does it touch?
{First name}, {Trigger} happens on {date}. How many of the systems at {Organization} does it touch? If that number isn't written down in one place, I have a short worksheet that gets it there. Worth sending? {AE name}, {Company}

Day 4 voicemail. Hi {First name}, {AE name} calling about {trigger}. I sent a note earlier this week. I won't pitch on a voicemail. I'd like to hear what you run and who keeps it updated. My number is {number}. I'll try you again in a couple of weeks.

Day 22 warm route. {First name}, I'm trying to find the person at {Organization} who owns updates. Is that you, your platform team, or an agency? A name is all I need.

Day 26 close the loop. {First name}, I'll stop writing after this one. If this isn't on your list this year, tell me and I'll close the file. If it is, but it belongs to someone else, a name would help. If the timing is later, tell me when and I'll write then. {AE name}

Sequence 2: The IT Leader

Nine touches in 30 days. This is fewer than the champion sequence, and more spaced out. The CIO or VP of IT won't champion this. The goal is to remove surprises so IT doesn't stall a deal the champion wants. Lead with governance questions. Offer the engineer, not the seller. Never go around the champion. Start it once the champion shows interest, or run it alongside, and mention the champion's team is engaged only when it's true. Document who in IT sets the rules for access, and every question IT raises, with the answer and who gave it.

Day	Channel	Purpose
1	Email	Ask who in IT sets the rules for who can administer which system.
3	LinkedIn	Connect with no note.
6	Email	Send a one-page list of the questions IT usually asks about access, roles and backups, so they see them early.
9	Phone	Call. Ask who in IT owns the hosting contracts.
13	Email	Offer 20 minutes with a solutions engineer. No seller on the call.
17	LinkedIn	Share a short note on how teams decide what AI coding tools may touch.
21	Email	If the champion is engaged, say so and ask IT to help set the review dates.
26	Phone	Call at a different time of day.

Day	Channel	Purpose
30	Email	Close the loop. Ask who else in IT should see this.

Sequence 3: The Second Pass

Seven touches in 28 days, two quarters after the first pass, on accounts with no reply or a "not now." It has to open with something new, or it's the same message twice. Use new angle, new person, new asset. Reference the date, not the silence. It's shorter than pass one because there's history to build on. The pass assumes the first pass ran before the trigger date. Swap the trigger if it didn't. Document what the first pass said, who replied, the reason and the return date.

Day	Channel	The touch	What is new
1	Email	Note that the trigger date has now passed. Ask where things landed. Name the month you last wrote.	The date has passed.
5	Phone	Call. Reference the return date they gave, if any.	Their own timeline.
8	Email	Send a short checklist for what hasn't moved yet.	A new asset.
14	Email	Write a different person at the account. Ask a question from their side of the problem.	A new person and a new angle.
18	LinkedIn	Share a product update that is live now. Check your release notes first.	A real change on your side.
22	Warm route	Ask the agency or a mutual contact who owns the next step.	A new route in.
28	Email and CRM	Close the loop. Set the outcome and the next return date.	A date, not a hope.

Sequence 4: The Raised Hand

Six touches in seven days. Someone replied, filled in the worksheet or visited the pricing page. Speed matters more than polish. The lead is warmest right after the action, so the sequence uses that window and doesn't nag after it. Reply to what they did, mention the asset by name and offer two meeting times. Then stop and move the lead to the slow cadence. Log the MQL source and asset on the record, and hours to first touch automatically.

When	Channel	The touch
Within the hour	Phone and email	Call. Send an email that names the asset they used and offers two times.
Day 1	LinkedIn and email	Connect. Send a meeting link.
Day 3	Phone	Call. Leave a short voicemail.
Day 5	Email	Send the next asset in the map, with one line on why.
Day 7	Email	Offer two choices: a next step now, or a pause with a date to follow up.

Troubleshooting

These problems follow from the stages above.

Problem	Likely cause	Fix
Accounts go quiet after the first pass.	Most were early, not wrong. About 5% of a market buys in a quarter.	Stop selling to them in quarter 2. Watch for triggers. Send them back through in quarter 3 with a new angle, person and asset.
Replies don't come.	Touches repeat the same reason, or read as "just checking in."	Give every touch a new reason to read it. Change the channel and time of day on each retry. Rewrite the weakest touch each week.
Sellers keep rejecting leads.	The lead rule doesn't match what sellers see as worth their time.	Review rejected leads every week. Change the rule when sellers keep rejecting the same kind. Tune the points after you see which leads become meetings.
Raised hands go cold.	The seller reached out too slowly.	Use the speed rule: reach out within one business day, and within the hour on a raised hand. Log hours to first touch.
Old lists never get revisited.	Sellers have little time to rework them by hand.	Let the record do it. Set a return date and an outcome on every closed record.
The pipeline is thin or too wide.	Every account gets the same hand work.	Sort accounts into tiers. Set Tier 1 by how many accounts one seller can research by hand.
IT stalls a deal.	IT meets its questions late.	Run the IT leader sequence. Send the questions early and offer the engineer, not the seller.
Deals stall in paperwork.	Legal and procurement start late.	Start them early, in parallel. Confirm every date in the shared plan with the champion.
The first invoice has an error.	The quote, order form and billing don't match.	Complete the booking checklist. Check the price and dates on all three before you mark the deal closed won.
The buyer explains the deal twice.	The handoff record is thin or late.	Write the handoff record within one business day. Hold the handoff call within three. Write down every promise.

Doug can set this up with you. Book a discovery call at mayberryadvisory.com.