ChatGPT

LinkedIn & Email Outreach SOP (Version 3)

This Standard Operating Procedure (SOP) captures the most current process for identifying prospects in LinkedIn Sales Navigator, researching them and delivering high-personalization outreach via email. It includes all enhancements from prior rounds as well as new guardrails and workflow refinements.

1. Objective

To systematically build lists of high-quality leads, craft custom email outreach and track results while avoiding duplicate contacts or spam. The goal is to maximize personalization and relevance for each prospect while maintaining efficiency in batch work.

2. Ideal Customer Profile (ICP) & List Selection

1. **Target roles:** Engineering Managers, Software/QA Managers, QA Architects, DevOps or Platform leaders—anyone responsible for software quality and release velocity.
2. **Target companies:** Firms building web/mobile products where automated testing matters (e.g. enterprise software, fintech, IoT/semiconductor, infrastructure providers).
3. **Geography and size:** Align with current campaign focus (e.g. U.S. enterprise). Filter your Sales Navigator saved views accordingly.
4. **List sources:** Use Sales Navigator saved views or lists such as “Recently Accepted Connections and InMails” or “New Executives at Saved Accounts” that match the ICP. Only work with lists containing new leads not previously processed.

3. Net-New Prospect Rule

Before adding a prospect to a batch, you must confirm they are **truly net-new**:

1. **No prior LinkedIn contact:** In the lead row or right-hand panel, ensure there is no “Messaged” label or evidence of a past conversation. If there is an existing thread (click “Message” if needed), mark them as previously contacted and skip.
2. **No prior visit:** Do not select people whose profiles you have already opened or browsed during previous sessions. Stick to unviewed rows in your list.
3. **No prior email outreach:** Cross-reference the `Email Outreach Tracker` (see section 7) to ensure the prospect’s name/company does not already appear. If they do, mark them as previously contacted and do not include them in a new cold batch.
4. **No prior Gmail correspondence:** If the Gmail connector is available, perform a quick search in your inbox for the prospect’s name or email address. If any previous sent email thread exists, treat the contact as previously contacted and exclude them from the new batch. (Use the Gmail search API or manually search within Gmail.)

Prospects failing any of these checks should be logged as “Previously Contacted” and treated as follow-up only, not new outreach.

4. Research & Bullet Creation

For each net-new prospect:

1. **Open the lead row** in Sales Navigator and wait patiently (30–60 seconds) for the right-hand panel to load fully.
2. **Capture three bullets**:
3. **Role summary (1-line):** Their current title and high-level responsibilities.
4. **Specific detail:** A notable point such as a recent promotion, tenure at the company, a specific project or team they lead.
5. **Hypothesized pain:** A guess at the challenge they face (e.g. shortening regression cycles, reducing test flakiness, scaling QA for IoT, etc.).
6. Record these bullets along with the prospect’s name, company, title and a LinkedIn search URL (see section 5) in `research_tab.csv`.

5. LinkedIn Search URL Format

Because direct profile URLs may not be reliably available, include a search link that will surface the correct profile when the user is logged in:

```
https://www.linkedin.com/search/results/all/?keywords=<URL-encoded “FirstName LastName Company”>
```

This link goes in the `LinkedIn URL` column of `research_tab.csv` and appears at the top of each email. Replace spaces with `%20` and special characters as needed (URL encoding).

6. Crafting Personalized Emails

1. **Subject line:** Summarize the value proposition or a relevant hook (e.g. “Streamlining QA for your IoT products”, “Improving DevOps reliability for MSP security offerings”).
2. **Opening hook:** Use the role summary and specific detail to write 1–2 sentences that show you know who they are and what they do.
3. **Value proposition:** Describe Testsigma succinctly (AI-powered test automation that allows teams to write tests in plain English and heals them automatically when apps change). Tailor the language to the prospect’s context (financial services, IoT, AI, etc.).
4. **Proof and benefits:** Mention outcomes like reduced regression cycles, improved reliability, and higher coverage. Highlight comparable companies or verticals where appropriate.
5. **Call to action:** Offer a choice between a quick call and sending materials. Keep the CTA soft and consultative.
6. **Sign-off:** End with “Best,” or “Thanks,” followed by **only “Rob”**—do **not** include your title, phone number or email address (these are handled by your Gmail signature).
7. **Format rules:**

8. Only use a standard hyphen (`-`) for dashes—avoid long dashes.
9. Do not include citations or footnotes within the email body.
10. Place the LinkedIn search URL at the very top of the email to facilitate quick access for the user.

7. Logging & Tracking

7.1 Research Tab (`research_tab.csv`)

For each prospect, append a row with the following fields:

Column	Description
Prospect Name	Full name
Company	Current company
Title	Role/title
LinkedIn URL	Search link as described in section 5
1-line Role Summary	Bullet summarizing the prospect's role
Specific Detail	Notable detail from their profile
Hypothesized Pain	Your guess at their challenge

7.2 Email Outreach Tracker (`email_outreach_tracker.csv`)

For each email sent, append a row capturing:

- **Date Sent** – The date the email is created.
- **Prospect Name** – Full name.
- **Company** – Company name.
- **Title** – Role/title.
- **Email Address** – Leave blank if unknown.
- **Account Type** – Leave blank or fill if known.
- **Source** – e.g. "Sales Nav".
- **Email Version ID** – Leave blank or fill as needed.
- **Angle** – The hypothesized pain or value angle used in the email.
- **Personalization Level** – "Tier A" for fully customized emails.
- **CTA Type** – e.g. "Choice (call or materials)".
- **Touch Number** – Always `1` for a first email.
- **Sequence Name** – e.g. "Initial Outreach".
- **Channel** – "Email".
- **Opened?**, **Replied?**, **Positive Reply?**, **Meeting Booked?**, **Outcome Notes**, **Next Step / Follow-up Date** – leave blank until outcomes occur.

8. Batch Workflow

1. **Select a list:** Navigate to the chosen Sales Navigator list (e.g. “Recently Accepted Connections and InMails”).
2. **Pick 4–8 net-new prospects:** Starting from the top, skip any rows already viewed or labeled “Messaged”. Perform the net-new checks in section 3.
3. **Research:** For each prospect, gather bullets (section 4) and record them in `research_tab.csv`.
4. **Compose emails:** Use the guidelines in section 6 to draft a personalized email for each prospect. Include the LinkedIn search link at the top, omit title/phone/email in your sign-off.
5. **Log:** Append entries to `email_outreach_tracker.csv` with the appropriate fields.
6. **Deliverables:** Provide the user with copy-ready emails for each prospect, plus updated versions of both CSVs and this SOP if changes were made.

9. Handling Roadblocks

- **Slow loading pages:** Allow 30–60 seconds for Sales Navigator panels to load. Avoid rapid navigation that could cause timeouts.
- **Access issues to direct profiles:** Use LinkedIn search URLs rather than direct profile links.
- **Previously contacted leads:** If a prospect shows as “Messaged” or appears in the tracker, log them as “Previously Contacted” and omit from new batches.
- **Volume vs. quality:** Limit each batch to 4–8 prospects to ensure every message remains high quality. If more volume is needed, run multiple batches rather than one large one.

10. Signature Reminder

Do **not** include your job title, phone number or email address in the email body. Gmail will automatically append your signature. Simply sign off as “Rob”.

11. Revision History

- **Version 1:** Initial SOP with basic workflow and tracking.
- **Version 2:** Added net-new prospect checks, ICP clarity, batch sizing, roadblock mitigation, and copy standards.

- **Version 3 (current):** Added rule to avoid revisiting viewed profiles, specified use of LinkedIn search URLs, removed contact info from sign-off, clarified logging fields and refined batch workflow.

- **Version 4:** Added explicit guidance to search Gmail for any prior correspondence before including a prospect in a new batch; clarified that if any previous email exists, the contact should be considered “Previously Contacted” and excluded from new cold outreach. Reinforced that the email sign-off should consist solely of your name, as your Gmail signature handles the contact details.
