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FREE TOOLKIT FOR CONSULTANTS, AGENCIES AND SERVICE FIRMS

The High-Value Client Toolkit

How to find, verify and reach the people who sign your biggest contracts — through the professional footprint they already publish, using the tools B2B sales teams have spent a decade building.

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1. The B2B decision-maker lens
2. The eight-stage workflow
3. The tool stack
4. Lead-quality scoring
5. Outreach that gets answered
6. Compliance guardrails
7. Cold Socket early access

START HERE

Your next best client is a named person with a public job.

Most service businesses prospect backwards: they start from what they sell and look for someone who might want it. B2B prospecting starts from the person and works forwards: who, because of the job they hold and what just happened to their company, is likely to need this in the next two quarters — and how do I reach them where they already do business?

High-value work is bought by people, not by companies. A founder, a partner, a VP of operations, a head of marketing, a practice lead. They sign because a problem became expensive enough, and they are findable because their professional identity is published on purpose: title, employer, city, a work address that routes to a real inbox, often a direct line and a LinkedIn profile they maintain themselves.

That published identity is the door. It exists so that other professionals can contact them about relevant business. Your service, offered at the right moment, *is* relevant business.

WHAT THIS IS

- Public professional data, used for a relevant professional purpose.
- Verified before contact, so you are not guessing at an address.
- One person writing to another about something that fits their situation.
- A record of where every contact came from, deleted the moment they ask.

WHAT THIS IS NOT

- Digging for private or personal information about anybody.
- Residential addresses, personal mobiles, family details, financial records.
- Buying a list and blasting it. That burns your domain and your name.
- Anything you would be embarrassed to explain in your first sentence.

THE ONE-SENTENCE TEST

If you cannot comfortably write *"I saw you just opened a second location in Milwaukee"* as the first line of the email, you found them the wrong way. Every method in this toolkit passes that test. Nothing that fails it is worth the reputation you would be risking.

TIMING

The five triggers worth watching.

A trigger is a dated, public event that creates or exposes the problem you solve. Triggers are what separate a relevant message from a cold one, and they are why timing beats volume.

- **A leadership hire in the function you serve** — a new head of X has a mandate and a budget.
- **A funding round, acquisition or merger** — a dated event with named people and new pressure.
- **A new office, market or location** — expansion breaks whatever was working before.
- **A relevant job posting** — a company hiring for a skill is a company that has admitted the gap.
- **A public product, rebrand or compliance deadline** — a date on a calendar somebody has to hit.

WHERE THIS FITS

A trigger is what stage 1 of the workflow calls "the trigger you care about" — see Section 2. Watching for one is what turns a static list back into a live one.

STAGES 1 TO 4

Eight stages, run weekly.

This is a loop, not a campaign. One pass a week beats a heroic month, because the triggers that make somebody worth contacting expire.

1 **Define the decision-maker as a set of filters.**

Not "growing businesses". Write it the way a search field would take it: seniority, function, company headcount, industry, office metro, and the trigger you care about. "Heads of operations at 50–500 person logistics and manufacturing firms in the Midwest whose company has posted an ops-automation role in the last 90 days."

Done when: the profile describes 200–400 real people, not 5,000.

2 **Find them where they publish themselves.**

One saved search per profile in LinkedIn Sales Navigator, with alerts on job changes and company news so the triggers come to you. Apollo.io covers firmographic filters LinkedIn will not give you. Start in the industries where you can already name a comparable result.

Done when: a named shortlist exists with a company and a role against every row.

3 **Enrich the record.**

Append the company domain, the business email, the company's main line, the LinkedIn URL, headcount and headquarters. Clay does this from many sources at once; Snov.io does it inside the same product you will send from. Keep the source of every field — you will need it if anyone asks where their data came from, and you should be able to answer.

Done when: every row has a business email *and* a second channel.

4 **Verify before anything is sent.**

Run every address through a verifier. Send only to results marked valid. Addresses that come back catch-all or unknown stay out of the email sequence — use LinkedIn for those instead. Send from a domain separate from your proposals and invoices, warmed for two to three weeks first — the full deliverability rules are in Section 6.

Done when: the projected bounce rate on the list is under 2%.

STAGES 5 TO 8

Rank it, write it, follow up, count it.

5

Prioritise with the rubric, not with your gut.

Score every contact out of 15 using the five dimensions in Section 4. Work the top band first and give it your real attention. A ranked queue of 40 people beats an unranked list of 400, because you can afford to personalise 40.

Done when: the list is sorted and banded, and you know today's forty.

6

Write one message with one reason and one ask.

Name the trigger in the first line. Make one specific offer that fits it. Ask for one thing, and make that thing small. Five sentences is plenty. The templates in Section 5 are built this way and are meant to be edited, not pasted.

Done when: a stranger reading it can tell why *they* got it.

7

Follow up like a professional, then stop.

Three to four touches across about three weeks, each adding something rather than asking again. Then the break-up message, and then you leave them alone. Any opt-out — a reply saying no, an unsubscribe click, a "take me off this list" — is honoured immediately and permanently, on your internal list as well as in the tool.

Done when: every contact has an outcome, including "closed, no".

8

Measure seven numbers, weekly.

Verified contacts added · messages sent · bounce rate · reply rate · positive reply rate · meetings booked · **signed engagements**. Only the last one pays you. The other six exist to tell you which stage broke when the last one stops moving.

Done when: the seven numbers are on one page and updated every Friday.

READING THE NUMBERS

Bounce rate high? Stage 4 — you are sending to unverified addresses. Replies low but bounces fine? Stage 6 — the message is generic. Replies fine but no meetings? Stage 1 — you are reaching pleasant people who were never going to buy. Fix the stage the number points at, not the one that feels broken.

WHAT TO ACTUALLY BUY

Six tools. You will not need all six on day one.

Start with one identification tool, one enrichment-and-verification tool, and somewhere for the pipeline to live. Add the rest when a stage in the workflow starts hurting.

TOOL	WHAT IT IS FOR	OFFICIAL LINK
LinkedIn Sales Navigator	Identify the person and the firm. Saved searches and job-change alerts do the watching for you.	business.linkedin.com/sales-solutions/sales-navigator
Clay	Enrich a list from many providers at once, then score and segment it before anybody is contacted. Strongest when you have a list and need it filled in and ranked.	clay.com
Snov.io	Find business emails, verify them, and run the sequence from the same place. The closest thing to an all-in-one on this page, and the cheapest way to run stages 3, 4 and 7.	snov.io · verifier at snov.io/email-verifier
Hunter	A second opinion on an address you are unsure about, and a fast read on which pattern a company domain uses.	hunter.io
Apollo.io	Alternative contact database with firmographic filters LinkedIn will not expose. Useful when your profile is defined by company attributes rather than by job title.	apollo.io
HubSpot CRM	Somewhere for the pipeline to live that is not a spreadsheet, with a free tier that is genuinely enough to start. Holds the outcome of every contact, including the no.	hubspot.com/products/crm

THREE HONEST NOTES

No affiliate links. Nothing on this page pays me, and none of these companies has endorsed this toolkit or knows it exists.

Pricing moves. Every one of these has changed its plans in the last two years. Check the current page before you commit to an annual contract.

Use the products, not bots. Scrapers and unofficial automation violate LinkedIn's User Agreement (linkedin.com/legal/user-agreement) and get accounts restricted. The paid tools exist precisely so you do not have to.

TURN A LIST INTO A QUEUE

Five dimensions, 0–3 each, 15 points total.

Score every contact once, when it enters the list. Re-score only when something changes. The point is not precision — it is that you spend your best hour on the right forty people.

DIMENSION	0	1–2	3
Fit	Wrong role or wrong company size.	Right function, off on seniority or scale.	Matches the profile exactly.
Trigger	No event. You are guessing.	An event, but older than 90 days.	Dated, public, inside 90 days.
Reachability	No verified channel.	Verified email, or LinkedIn only.	Verified email plus a second channel.
Authority	No budget and no say.	Influences the decision, does not own it.	Owns the budget for this problem.
Path	Cold, no shared ground at all.	Shared group, school, or a second-degree link.	Mutual connection who would introduce you.

What to do with the score

SCORE	BAND	WHAT IT EARNS
12–15	**Work now**	Hand-written first touch, researched properly. Ask for the referral path if there is one. These are worth an hour each.
8–11	**Sequence**	Templated but personalised first line, four touches, then closed. This is where the volume lives.
4–7	**Nurture**	No outreach. Follow on LinkedIn, watch for a trigger, re-score when one lands.
0–3	**Drop**	Remove from the list. Keeping them costs you deliverability and attention for nothing.

THE RULE THAT MAKES THIS WORK

A contact with no verified channel and no trigger cannot score above 7 no matter how good the company logo looks. If your whole list is scoring 4–7, the problem is stage 1 — go back and write a tighter profile rather than lowering the bar.

FOUR MESSAGES, WRITTEN TO BE ANSWERED

Short, specific, and easy to say no to.

Edit these. A template sent verbatim reads like a template. Square brackets are yours to fill; if you cannot fill them, that contact was not researched enough to write to.

1 · FIRST TOUCH · EMAIL

Subject: [Company]'s new [role] hire

Hi [First name] — saw you brought on a [role] last month. Congratulations.

I run [your firm], and we do [one specific thing] for [industry] companies at about your size. When teams make that hire, the first thing that usually surfaces is [specific, credible problem].

We did exactly that for [comparable company or anonymised description], and [concrete, honest outcome you can actually stand behind].

Worth a ten-minute call, or should I send the one-page version and let you decide?

[Full name] · [Company]
[Office postal address] · [Unsubscribe link]

Why it works: the trigger is in the subject line, the offer fits the trigger, and the ask is a choice between two small things rather than a yes/no. The footer is not optional — see Section 6.

2 · FOLLOW-UP · DAY 5

Subject: re: [Company]'s new [role] hire

[First name] — one thing that might be useful either way.

[One genuinely useful item: a benchmark, a short teardown of something public, the checklist you would run in their first 90 days.]

If this isn't your call, tell me who it sits with and I'll stop filling your inbox.

Why it works: it gives before it asks again, and it offers an exit that is also a referral. Most positive replies to this one are a name, not a meeting.

TWO MORE, FOR WHEN EMAIL IS NOT THE CHANNEL

The short note, and the honest exit.

3 · LINKEDIN CONNECTION NOTE · 300 CHARACTERS

Hi [First name] — saw the [trigger]. I work with [industry] teams on [one specific thing]. Happy to be a useful contact if it comes up, no pitch.

Why it works: it says what it wants and promises nothing else. Use this for contacts whose email came back catch-all or unknown at stage 4.

4 · THE BREAK-UP · DAY 21

Subject: closing the loop

[First name] — I'll leave this here. If [problem] comes up for you or anyone on your team, my details are below and the door is open.

Good luck with the [trigger].

Why it works: it ends the sequence honestly instead of trailing off, and it is the message that most often gets a reply. Send it, then actually stop.

Never imply a relationship you do not have, never claim a client you cannot name or evidence, and never quote a result you did not produce. A single unverifiable claim in a first email costs you the whole sequence.

THE CADENCE, PUT TOGETHER

Day 1 first touch → day 5 follow-up → LinkedIn note for anyone unverified → day 21 break-up, then silence. Four touches, three weeks, one outcome recorded either way. Every send in that cadence has to carry the footer and the opt-out in Section 6 — read it before you send the first one.

READ THIS SECTION TWICE

The rules are not the hard part. Ignoring them is.

EMAIL · CAN-SPAM

Accurate From, Reply-To and routing information. A subject line that describes the message. Your valid physical postal address in every send. A clear opt-out that works and is honoured promptly — the Act allows up to ten business days; honour it the same day. Applies to commercial email whether or not the recipient is a business. ftc.gov · CAN-SPAM compliance guide

PHONE AND TEXT · TCPA AND DO NOT CALL

Autodialled or pre-recorded calls and marketing texts to a wireless number need prior express written consent. A business number is not consent. Scrub against the National Do Not Call Registry, keep your own internal do-not-call list forever, and observe calling hours. Telemarketer access to the registry is at telemarketing.donotcall.gov; the rule itself is 47 CFR §64.1200 — ecfr.gov/current/title-47/section-64.1200.

PRIVACY LAW · WHERE YOUR CONTACT LIVES, NOT WHERE YOU DO

- **California (CCPA/CPRA)** — disclosure and deletion rights apply to business contact data too. oag.ca.gov/privacy/ccpa
- **EU / UK (GDPR)** — you need a lawful basis, a record of the source, and an honest answer when somebody asks how you got their address. commission.europa.eu · data protection
- **Canada (CASL)** — stricter than CAN-SPAM: consent is generally required *before* a commercial electronic message, with narrow exceptions. ised-isde.canada.ca · CASL

PLATFORM TERMS

Scraping, bulk automation and unofficial tooling breach LinkedIn's User Agreement and are the fastest way to lose an account you have spent years building. linkedin.com/legal/user-agreement

DELIVERABILITY IS A RULE NOW, NOT A PREFERENCE

Bulk senders must authenticate with SPF, DKIM and DMARC, offer one-click unsubscribe, and keep spam complaints below 0.3%. Miss those and your mail stops arriving regardless of how good it is. support.google.com/a/answer/81126

> **THIS IS NOT LEGAL ADVICE**
>
> The rules differ by state, by country, and by whether the person you are contacting counts as a consumer or a business. Have counsel read your sequence and your footer once before you send at any volume. That review costs less than one complaint.

COLD SOCKET · EARLY ACCESS

This toolkit is the manual. Cold Socket is the machine.

Everything in here works today with the six tools in Section 3, stitched together by you. That stitching is the part I want to delete.

Cold Socket is what I am building: connect an inbox, keep your leads in one place, and run compliant outreach sequences without wiring five products together and reconciling them by hand every Friday.

It is not live yet, and I am not going to pretend otherwise. If you downloaded this from briandecoded.com and left an address, you will hear from me when there is something real to log into, and not before.

YOUR FIRST WEEK, IF YOU WANT A STARTING POINT

- **Monday** — write one decision-maker profile as filters. One. Aim at 200–400 people.
- **Tuesday** — set up the saved search and the alerts. Let them run.
- **Wednesday** — enrich the first fifty rows and verify every address.
- **Thursday** — score them, and take the top ten seriously.
- **Friday** — send ten first-touch messages you actually wrote. Then start the seven numbers.

If you want the version where I do it with you

I build agent-run acquisition systems for owner-operated businesses — this workflow is one of them. If you would rather have it installed than build it, briandecoded.com/ai-implementation-session is where that conversation starts.

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Shared freely. Pass it to someone else if it is useful — just leave it whole.