Lakeside GROWTH

The Pipeline Playbook.

Build Your Own Pipeline Engine.

Outbound. Inbound. Follow-Up.

A step-by-step system for building predictable revenue, from the team at Lakeside Growth.

lakesidegrowth.com

Contents

READING TIME ~ 25 MIN · BUILD TIME 40–60 HRS

This is the actual system, not a theory deck. Three connected motions, every step you need to build it yourself.

INTRODUCTION

Build Your Own Pipeline Engine

This approach is proven to produce a consistent pipeline for companies across SaaS, professional services, faith-based media, and B2B technology. It is not a theory deck. It is the actual system, broken into three connected motions, with every step you need to build it yourself.

If you follow this end-to-end, expect to invest 40 to 60 hours of focused work plus ongoing optimization. If you would rather skip the build and have it running in your business within two weeks, book time to speak with one of our team members.

How to Use This Playbook

Pipeline is not a single channel. It is a system. Most companies lose because they pick one motion, execute it halfway, and then blame the channel when it does not work.

The three motions in this playbook work together:

- **Outbound** gets your message in front of the right people before they are searching.
- **Inbound** captures the people who are searching and qualifies them for you.
- **Follow-Up** catches everyone who is not ready yet and keeps you top of mind until they are. Deals close on follow-up.

Each motion works on its own. If you only have the bandwidth to build one right now, start with the one that solves your most urgent problem. If you need meetings now, start with outbound. If you need to build authority and attract inbound interest, start with inbound. If you are already generating traffic but losing people before they convert, start with follow-up.

You will see results from a single motion. But you will see significantly better results when two or three are running together, because each one feeds the others. Outbound drives traffic that follow-up captures. Inbound warms up prospects that outbound then converts. Follow-up turns both into revenue you would have otherwise lost.

Build one and you have a channel. Build all three and you have a pipeline engine that compounds every month.

We recommend working through the sections in order, even if you only plan to build one. Understanding how the full system connects will help you build the piece you choose more effectively.

3	90	2 wks
Connected motions	Days to predictable pipeline	From kickoff to live

SECTION 01

01

Multi-Channel Outbound.

SECTION 01 · OUTBOUND

What You Are Building

A three-channel outbound engine that puts your offer in front of your ideal customers through LinkedIn, 1:1 video, email, social engagement, and voicemail, coordinated so the same prospect sees you across channels without feeling spammed.

By the end of this section you will have:

- A defined ICP with buying signals you can actually act on.
- A validated list of 1,000 to 5,000 real prospects.
- LinkedIn connection and message sequences that book meetings.
- Email sequences with warmed-up sending infrastructure.
- A light voice touch layer for high-value accounts.
- Tracking and reporting that tells you what is working.

Prerequisites

Before you build, you need:

- **A clear offer.** If you cannot explain what you sell and who it is for in two sentences, stop here and fix that first.
- **LinkedIn Sales Navigator.** The core license starts at around $100 per user per month.
- **A dedicated outbound domain.** Never run outbound from your primary business domain. Buy a variant so if deliverability takes a hit, your main domain stays clean.
- **5 to 10 inbox addresses** on that outbound domain. Each inbox will send a limited volume per day. More inboxes means more volume without triggering spam filters.
- **A CRM.** HubSpot, Salesforce, GoHighLevel, or similar. You need somewhere to land replies.
- **AI workflow and automation tools.** Clay for data enrichment and waterfall workflows, Claude Desktop for AI-powered ICP scoring and copy generation, and Apify for scraping LinkedIn profiles and company data at scale.
- **A cold email platform.** Instantly is what we recommend. Handles sending, warmup, and reply management in one place.
- **A LinkedIn automation layer.** Off-the-shelf tools like HeyReach, Dripify, or Lakeside Growth Outreach platform that handles message sequences such as LinkedIn connection requests, LI messages, email, 1:1 video, social engagement, and voicemail. Or you can build your own automation using Apify actors, which gives you more control but takes more setup time.

STEP 1 Define Your ICP

Most companies define ICP too broadly. "CMOs at mid-market SaaS companies" is not an ICP — it is a job title. A real ICP covers two kinds of information: what you can *filter* for in Sales Navigator, and what shapes the *message* you send once you find them. Both matter.

Part A — What You Filter For (Firmographics & Personas)

These are the two dimensions Sales Navigator actually lets you search on. Get them right and your list is targeted. Get them wrong and no amount of clever copy saves you.

- **Firmographics.** Industries and sub-verticals, company size, revenue range, and geography. Start with your best five customers and look for the pattern.
- **Personas.** The actual humans who will receive your messages. Job title, seniority, what they own, and what would make them take a meeting. Most companies have two or three personas, not one.

Also write down your **disqualifiers**. Who should you never reach out to, and why? Saves you and the prospect time, and protects your deliverability.

Part B — What Shapes the Message (Pains, Outcomes, Proof)

- **Pains.** Three to five specific, expensive, time-sensitive problems your offer solves. Use your customers' words.
- **Outcomes.** For each pain, what does life look like after working with you? Quantify wherever possible.
- **Proof points.** Named clients, case studies with measurable results, testimonials, awards, published content.
- **Objections.** The pushback you hear on sales calls. Document how you handle each one.
- **Brand voice.** Three adjectives that describe how you should sound. Words to avoid. Words to lean into.

Write all of this down in one document. This is the foundation. Every campaign you build from here (messaging, ads, webinar topics, follow-up flows) traces back to it.

> *Lakeside clients fill out our full ICP & Messaging Workbook during onboarding. If you want a copy to use yourself, reach out and we will send it over.*

STEP 2 Build Your Prospect List

This is where most people either buy a list and pray, or spend weeks manually searching LinkedIn. Neither works. Here is how to build it properly using AI.

Option A — Apollo to Clay

Use Apollo to filter and find target accounts matching your ICP firmographics. Export the results into a Clay table for enrichment and scoring.

Option B — LinkedIn Sales Nav to Apify to Clay

Run your Sales Nav search using firmographic and persona filters. Then use Apify actors to collect the LinkedIn profiles and company data from your saved search. Load the output into Clay for enrichment.

Option C — Existing CSV or CRM Import

If you already have a list from events, past campaigns, or your CRM, upload it directly into Clay and skip the sourcing step. But do not send to an old list without validating it first. Stale data means bounced emails, and bounced emails burn your sending domains. Run every imported list through an email verification tool (MyEmailVerifier, ZeroBounce, or Clay's built-in validation) before a single message goes out. A clean list with 1,000 contacts will outperform a dirty list with 5,000 every time.

Step 2b — Waterfall Enrichment in Clay

Once your raw list is in Clay, run a waterfall enrichment flow. Clay checks multiple data providers in sequence to fill in missing fields: work email, phone, company revenue, tech stack, LinkedIn URL, and any custom fields you need.

After enrichment, score each contact against your ICP using Claude Desktop or Clay's built-in AI scoring. Feed it your ICP definition from Step 1 and let it rank every contact by fit. Remove anything below your threshold before it enters a sequence.

Target a clean, scored list of 1,000 to 5,000 contacts. More than that and you are too broad. Fewer and you will burn through the list before your sequences prove out.

This entire workflow (source, enrich, score, clean) is what a custom AI agent automates for you. Without it, you are doing each step manually, tool by tool, spreadsheet by spreadsheet. It works, but it takes time. A lot of time.

STEP 3 Warm Up Your Sending Infrastructure

Never send cold email from a new inbox. Every inbox you plan to use needs 2 to 4 weeks of warmup before it sees a real prospect.

Use a warmup tool (Instantly, Mailwarm, or built into your sending platform). Start each inbox at 10 emails per day and ramp to 40 to 50 per day over the warmup window. The warmup tool simulates real conversations so your domain builds reputation with Gmail and Outlook.

While warmup runs, set up your DNS properly:

- SPF record authorizing your sending IP.
- DKIM signing configured.
- DMARC policy set to at minimum p=none with reporting enabled.
- A custom tracking domain so links do not route through a shared tracker.

> If any of this sounds foreign, pause and get it right. Bad DNS is the single most common reason outbound campaigns die.

STEP 4 Write Your Sequences

You need sequences running in parallel: LinkedIn, email, 1:1 video, social engagement, and voicemail.

LinkedIn Sequence (7 touches over 21 days)

- **Day 0:** Connection request with a personalized opener. 300 character max. Mention one specific thing about them or their company.
- **Day 1:** Once connected, create natural social engagement by viewing their profile and/or liking or commenting on recent posts.
- **Day 2:** Post-connection thank-you message. Do not pitch. Include a short 60-second video that shares a bit more about you, but most importantly make sure they know you want to learn about them.
- **Day 3:** Follow up with an email regarding connecting on LinkedIn. Include a short introduction that shares a bit more about you, but most importantly make sure they know you want to learn about them.
- **Day 7:** Value-first message. Share a resource, insight, or observation relevant to their role. Still no pitch.
- **Day 12:** Social engagement (like, comment, endorsements) and/or voicemail follow-up to remain top of mind.
- **Day 12:** Soft introduction of your offer framed as a question. "Curious if [specific pain] is something you are navigating right now?"
- **Day 17:** Email and/or LinkedIn — case study or proof point. One paragraph. Specific outcome, specific client type.
- **Day 21:** Email and/or LinkedIn — direct ask. "Worth a 20-minute conversation to see if this applies?"
- **Day 28:** Email and/or LinkedIn — break-up message. "Happy to go quiet. Let me know if there is a better time."

> **Important:** Frequency on touchpoints is heavily dependent on ICP and buyer. We suggest you research this and adapt to your audience. If you want assistance, feel free to reach out to Lakeside and we'll be happy to provide guidance.

STEP 5 Launch, Measure, Optimize

Launch in batches of 15 to 25 prospects per day. Do not blast the full list at once — it's important to identify what's working or not before scaling. Once you land on a winner, you can begin to double down with more volume.

Track these numbers every week:

Metric	Target
Connection acceptance rate (LinkedIn)	≥ 30%
Reply rate (LinkedIn + email combined)	8–12%
Positive reply rate	10–25%
Meetings booked (% of total list)	3–8%

If any number is below target, something is broken. Fix it before you scale.

(See recommended tools section for details)

What "Done" Looks Like

You have a predictable, repeatable system that consistently produces qualified meetings and pipeline with minimal manual effort. When you increase volume, output scales proportionally.

If it doesn't scale, it's not done. Find the bottleneck and fix it.

SKIP THE 40-HOUR BUILD

From ICP definition to live campaigns in two weeks, fully managed.

If you would rather skip the 40–60 hour build, we will set it all up and hand you the meetings.

SECTION 02

02

Inbound & Content-Driven Demand.

SECTION 02 · INBOUND

What You Are Building

A webinar and thought-leadership engine that attracts the prospects who are actively searching for what you sell, and qualifies them before they ever hit a sales call.

By the end of this section you will have:

- A monthly webinar cadence with built-in registration and follow-up flows.
- Thought-leading content for social channels.
- Lead magnets that capture self-qualifying prospects.
- Analytics that show you which topics drive pipeline, not just clicks.

Prerequisites

- A webinar platform. Zoom Webinars, Demio, WebinarJam, or Stacked Growth. We prefer Stacked Growth because it handles trending topic identification, landers, registration, reminders, analytics of who signed up, who joined the webinar and who didn’t, replay, and clipping in one platform.
- A landing page builder. GoHighLevel, Unbounce, ClickFunnels, or your CRM's native builder.
- A subject matter expert. Someone in your company who can talk about your space for 30 minutes without reading a script. Usually the founder or a senior practitioner.
- A content calendar. 12 topics minimum to cover a year of monthly webinars.

STEP 1 Choose Topics That Convert

Webinar topics fall into two categories: **educational** and **commercial**. Educational pulls in top-of-funnel audiences (high volume, low intent). Commercial pulls bottom-of-funnel (lower volume, higher intent). These are the ones that actually book meetings.

Your calendar should be **70% commercial, 30% educational**. Most companies reverse this and wonder why webinars do not generate pipeline.

> A commercial topic answers a specific, expensive question your buyer is already asking. "How to reduce customer acquisition cost by 40 percent in a down market" is commercial. "The future of AI in marketing" is educational.

To identify trending topics that are top of mind for your ICP, try using Google Trends, Answer the Public, or another source for real-time data.

STEP 2 Build Your Webinar Landing Page

Every webinar needs its own landing page. Do not reuse a template with the topic swapped. Each page should have:

- A headline that names the specific outcome the attendee will get.
- A subheadline that names the pain the webinar solves.
- A three-bullet breakdown of what is covered.
- A speaker bio with credibility markers.
- A simple registration form (name, email, company, role).
- A clear date, time, and duration.

No sidebar. No distractions. One conversion action on the page.

STEP 3 Drive Registrations

You have four channels to drive webinar registrations:

- **Email to your existing list.** Three touches: 14 days out, 7 days out, 24 hours out.
- **LinkedIn organic.** Speaker posts three times: announcement, preview insight, last-call day-of.
- **Identity resolution.** Retarget visitors who hit the page but didn't register.
- **Outbound integration.** Section 1 sequences should mention the webinar as a soft alternative CTA.

Depending on your audience expect 30 to 40 percent live attendance from those who registered. If 100 registered expect 30-40 to show. With that in mind, you can determine how many registrants your targeting.

STEP 4 Run the Webinar to Convert, Not to Teach

The structure matters more than the content:

- **First 5 min:** Frame the problem and name who this is for.
- **Next 20 min:** Deliver the teaching. Specific, tactical, useful even if they never buy.
- **Next 10 min:** Show the gap between DIY and done-for-you. Bridge to your offer.
- **Last 15 min:** Q&A with a clear CTA to book a follow-up call.

> Never end a webinar without a specific next step. Most webinars die here.

STEP 5 Build the Follow-Up Engine

The webinar generates ~20% of total pipeline. The follow-up generates the other 80%.

After every webinar:

- **Replay email** within 4 hours. Includes the recording, a one-page summary, and a booking link.
- **Resource email** 48 hours later. A downloadable asset tied to the webinar topic.
- **Case study email** 7 days later. Proof that the approach works.
- **Direct ask email** 14 days later. One specific offer to book a conversation.

> **Important:** Frequency on touchpoints is heavily dependent on ICP and buyer. We suggest you research this and adapt to your audience. If you want assistance, feel free to reach out to Lakeside and we'll be happy to provide guidance.

STEP 6 Repurpose Everything

Every webinar is a content engine, not just an event. After each one:

- Cut 5–10 short clips (30–90 seconds each) for LinkedIn and YouTube Shorts.
- Write 2–3 LinkedIn posts pulling threads out of the webinar.
- Turn the full recording into a YouTube video with a strong title and description.
- Transcribe and edit into a blog post or long-form LinkedIn article.
- Pull one hero insight into a standalone email to your list.

One webinar should produce 30 days of distributed content across channels.

(See recommended tools section for details)

What "Done" Looks Like

You are running 1–2 webinars per month, generating 20–40 qualified conversations each, with a content engine that keeps your name in front of your audience between events.

SECTION 03

03

Follow-Up & Automated Nurture.

SECTION 03 · FOLLOW-UP

What You Are Building

A system that captures every visitor to your website, identifies who they are, and nurtures them until they are ready to buy — whether that's next week or next year.

By the end of this section you will have:

- Identity resolution on your website (or webinar registration page) so you know who is visiting, not just that "someone" visited.
- A segmented email nurture flow tied to the stage each prospect is in.
- A clear handoff from nurture to sales when prospects show intent.
- Ideally, automated triggers that move prospects between flows based on behavior.

Prerequisites

- A marketing automation platform. HubSpot, Marketo, ActiveCampaign, or GoHighLevel
- An identity resolution tool. Traffic2Leads, Clearbit Reveal, or RB2B are the main options. These match anonymous website visitors to real people using permissioned data networks.
- A CRM integrated with the above. Prospects need to flow into sales the moment they qualify.
- Content assets. You cannot nurture with nothing. You need at minimum a few case studies, a product explainer, and one or two educational pieces per ICP segment.

STEP 1 Install Identity Resolution

Add the identity resolution script to every page of your website. The tool will match anonymous visitors to real people through its data network. Match rates typically run 30 to 60 percent of US-based traffic.

The output: a daily or weekly feed of actual people, with names, titles, companies, and email addresses, who visited your site. This is the single highest-intent signal in your entire system.

Pipe this feed into your CRM automatically. Every match should create or update a contact record with a "website visitor" tag and the specific pages viewed.

STEP 2 Segment by Intent

Not every visitor is equal. Build three tiers:

- **Tier 1 (high intent).** PVisited pricing page, case studies, or "contact us." Set up an immediate alert to sales. These prospects get a personalized email from a real human within 24 hours (this can be accomplished with AI but does require advanced skills).
- **Tier 2 (medium intent).**Viewed 3 or more pages including at least one product or solution page. Enter a 30-day nurture flow with educational content and a soft booking CTA.
- **Tier 3 (low intent).** Single-page visitor, likely blog or homepage. Enter a slower 90-day flow focused on content and brand awareness.

STEP 3 Build the Nurture Flows

Each tier gets its own flow. Keep the ratio at 80% value, 20% pitch.

Tier 1 Flow (5 touches over 10 days)

- **Day 1:** Personalized outreach from a sales rep referencing a specific page viewed.
- **Day 3:** Case study matching their industry.
- **Day 5:** Short video from a founder or exec addressing a common objection.
- **Day 7:** Direct meeting request.
- **Day 10:** Break-up message with a soft "stay in touch" offer.

Tier 2 Flow (8 touches over 30 days)

- Educational content weeks 1 and 2.
- Case studies and proof points week 3.
- Soft booking CTAs week 4.
- Move to Tier 3 if no engagement by day 30.

Tier 3 Flow (bi-weekly or monthly for 90 days)

- Blog posts, industry insights, newsletter-style content.
- Low-pressure. Move to Tier 2 if they visit a higher-intent page.

> **Important:** Frequency on touchpoints is heavily dependent on ICP and buyer. We suggest you research this and adapt to your audience. If you want assistance, feel free to reach out to Lakeside and we'll be happy to provide guidance.

STEP 4 Set Up Behavioral Triggers

The power of this system is that prospects move between tiers automatically based on what they do.

- Tier 3 visits the pricing page → move to Tier 1, alert sales immediately.
- Tier 2 opens 3 emails in a row → accelerate to next stage.
- Tier 1 goes cold for 14 days → drop back to Tier 2.
- Any prospect downloads a case study → trigger an immediate sales alert.

STEP 5 Close the Loop to Sales

The best nurture system fails if sales doesn't act on the signals.

Set up:

- A daily digest email to sales showing every Tier 1 contact from the last 24 hours.
- A Slack or Teams integration that alerts on high-intent events in real time.
- A clear SLA for sales response. Tier 1 gets a personal touch within 24 hours, no exceptions.

> Without this handoff, you are nurturing forever and selling nothing.

(See recommended tools section for details)

What "Done" Looks Like

You are converting 3 to 5 percent of website traffic into real conversations, recovering 20 to 30 percent of lost prospects through nurture, and your sales team gets a daily feed of warm, in-market accounts to work without cold outreach.

> *This is the hardest piece to build in-house because it touches identity resolution, CRM integration, content production, and sales ops. We have built it dozens of times, generally seeing 7–12% conversions within 5–6 months. We can have your full nurture engine running in a matter of weeks.*

SECTION 04 · TOOLBOX

Recommended Tools & Pricing

You'll need a stack of tools to run this playbook end to end. Below is what we use internally at Lakeside Growth and recommend to clients who want to build this themselves. Prices are accurate as of this writing and change periodically. Check each vendor's site for current pricing.

> **A note on referral links:** where you see a link, it's a referral from Lakeside Growth. Using it doesn't cost you anything extra and in some cases gets you a discount.

Outbound Stack

Tool	Cost	What it does
LinkedIn Sales Navigator	~$100/user/mo	Required for advanced prospect search and saved lead lists. Upgrade to Advanced ($150) once scaling.
Apollo	Free / $49–79/mo	Data enrichment and email discovery. Professional plan once sending real volume.
Instantly	$37–97/mo	Cold email sending with built-in warmup, deliverability monitoring, and unified inbox.
Clay	Free / $149–349/mo	Backbone of your data workflow. Waterfall enrichment, AI scoring, automated list building.
Claude Desktop	Free / $20/mo	AI-powered ICP scoring, messaging generation, objection handling, custom AI agents.
Apify	Free / from $49/mo	Web scraping and automation. Collect LinkedIn profiles from Sales Nav searches at scale.
LinkedIn Automation	$39–99/user/mo	HeyReach, Dripify, or Lakeside Growth Outreach. Multi-channel sequencing across LinkedIn and email.
Outbound domain + inboxes	~$30–60/mo	Domain (~$12/yr) plus 5–10 Google Workspace inboxes ($6 each) on a dedicated outbound domain.

Inbound Stack

Tool	Cost	What it does
Webinar Platform	$79–499/mo	Zoom Webinars, Demio, WebinarJam, or Stacked Growth (registration, replay, clipping bundled).
Landing Page Builder	$97–147/mo	GoHighLevel, Unbounce, ClickFunnels — or use your CRM's native builder if available.
Content Clipping	$15–19/mo	Opus Clip or Descript for cutting webinar recordings into short-form clips.

Follow-Up Stack

Tool	Cost	What it does
Marketing Automation	$15–890/mo	HubSpot, GoHighLevel, or ActiveCampaign. Where your nurture flows actually run.
Identity Resolution	$300–1,500/mo	Traffic2Leads (our pick). Matches anonymous visitors to real people — highest-intent signal in the system.
CRM	Free / $20/user	HubSpot, Salesforce, or GoHighLevel (CRM + automation + landing pages bundled).

What This Costs in Total

Tier	Monthly	Stack
Lean	$400–700	Solo founder or small team. Sales Nav, Apollo free, Instantly Growth, Clay Explorer, basic LinkedIn automation, ActiveCampaign, small webinar tool.
Standard	$1,200–2,000	Growing team. Sales Nav, Apollo Pro, Instantly Hypergrowth, Clay Pro, Apify, HeyReach, GoHighLevel, Stacked Growth, Traffic2Leads.
Enterprise	$3,000–5,000	Scaling aggressively. Add HubSpot Pro, multiple Apify actors, dedicated domains for multiple sending pools, higher-tier identity resolution.

> These numbers exclude your own labor. If you factor in the 40–60 hours of initial build, the learning curve on Clay and Apify, ongoing weekly optimization, and the inevitable debugging when integrations break, the all-in cost to run this yourself is typically higher than having us do it for you.

THE HONEST TRUTH

DIY vs Lakeside Growth

	BUILD IT YOURSELF	LAKESIDE GROWTH
Tools to manage	10–12 separate platforms	**All under one roof**
Setup time	40–60 hrs + learning curve	**Live in 2 weeks**
Integrations	You debug them at 10pm	**Already built and battle-tested**
Point of contact	Each vendor's support queue	**One team, one invoice**
When something breaks	You	**Us**
Time to first meeting	8–12 weeks (if you finish)	**2 weeks**

The DIY path is real and it works. But the honest truth is that most businesses underestimate setup time, overestimate their capacity to maintain it, and end up with a half-built system that never fully performs. That's why most readers of this playbook end up booking a call.

PUTTING IT ALL TOGETHER

Putting It All Together

Each of these three motions works on its own. You can build outbound and start booking meetings without a webinar program. You can run inbound without a cold email engine. You can deploy follow-up and start recovering lost visitors without touching LinkedIn.

But here is what happens when they run together.

Outbound generates demand where none exists. Inbound captures demand that is already forming. Follow-up holds everyone in between until they are ready, because deals close on follow-up. Each motion feeds the others. Outbound drives traffic that follow-up captures. Inbound warms up prospects that outbound converts. Follow-up turns both into revenue you would have otherwise lost.

One motion gives you a channel. Two motions give you momentum. All three give you a pipeline engine that compounds every month.

If you have read this far, you already understand the work involved. Whether you are building one motion or all three, the real question is not whether this system works. It is whether you want to spend the next 6 months building it yourself, or whether you want it running in your business 30 days from now.

We have built this for companies across industries, from early-stage SaaS to enterprise B2B. Same architecture. Same results.

> Book a 30-minute conversation with our team. We will learn about your business, show you exactly how we would build your lead gen engine, and if it is a fit, have you up and running in no time.
>
> And if you would rather go the DIY route but want some guidance along the way, we are happy to talk through that too. Same call. Same team. We will point you in the right direction either way.