

SOLUTION SPOTLIGHT

Outbound Lead Generation Best Practices

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Buyers demand more. Selling is getting harder

These are the operational pains we see most often in sales organizations.

Reps spend too much time on manual tasks

AT STAKE
Selling time

Leads take too long to respond to

AT STAKE
Speed to first touch

Reps aren't closing opportunities fast enough

AT STAKE
Deal cycle length

Too many opportunities stall or are lost

AT STAKE
Win rate

Pipeline doesn't have enough open opportunities

AT STAKE
Pipeline coverage

Pipeline opportunities are too small on average

AT STAKE
Average deal size

Renewal and expansion opportunities are missed

AT STAKE
Net revenue retention

Service interactions don't fuel new sales

AT STAKE
Account growth

How **AI Is Driving** More Sales Engagement

Becoming Core to the CRM layer

- Customer 360
- Collaboration
- Activity capture
- AI agents
- Analytics
- All running on a single platform

Unifying Customer and User Context

- Account, Lead, Contact, Opportunity
- Activity
- Product
- Historical performance data
- All must stay connected

Enabling Better Signals

- Object data
- Activity data
- Product data
- Engagement data
- All available in one governed layer.

CHALLENGES ABOUND

Traditional Outbound is Rapidly **Losing Effectiveness.**

The new reality

- ✗ Inboxes are hard to get into
- ✗ Buyers ignore generic outreach
- ✗ Manual personalization doesn't scale
- ✗ Signals are everywhere, but disconnected

Why

- ✗ Spam filters reduce cold email inbox placement rates below 60%
- ✗ Over 80% of B2B buyers engage only with highly relevant messaging.
- ✗ Reps spend up to 70% of their time researching accounts instead of engaging buyers.
- ✗ Intent data and CRM activities remain fragmented across 10+ tools.

2026 Vision for Sales Engagement



1. Define & Prioritize Target Accounts (TAL)
2. Orchestrate Multi-Channel Sequences
3. Align with Marketing Campaign Air Cover
4. Activate Signal- & Trigger-Based Engagement
5. Execute ABM Plays at Account Level
6. Track Engagement & Optimize in Motion
7. Close the Loop: Pipeline & Revenue Insights

Feature matrix.

Sales Engagement Core:

- Omni-Channel Sequences:
 - Email (Automated and Manual)
 - Native Telephony
 - Text/SMS (Coming H1 FY27)
- Sales Email Templates with configurable macros
- Engagement Schedules and Rulesets
- Auto warm-up mailboxes (Coming H2 FY27)
- Team, Sequence and E2E Revenue Generation Performance reports
- LinkedIn (incl Sales Navigator) Chrome Extension for prospecting
- Sequence Tasks Execution Desktop
- Engagement Signals
- AI Agents

Supporting Features:

- Creatio Marketing Campaigns and Segmentation
- Lead Scoring
- Telephony Connectors available on Marketplace
- Workflows for conditional scenarios and branching



AI Agents to drive More pipeline



- Account and Leads Research
- External Signals Collector (News, Posts)
- Email Template Generation
- Lead Summary
- Prospect Engagement Signal Notification
- Sequence performance summary

Omni-channel Sequences Engine

Multi-Step, Multi-Channel Sequences

Design automated outreach flows combining email, calls, LinkedIn, and tasks to engage prospects consistently across touchpoints.

Personalization at Scale

Use dynamic fields, templates, and macros to tailor messaging while maintaining high-volume efficiency.

Native to Creatio Sales Workflows & Creatio Platform

Leverage Customer 360, and capture customer engagement to align with the broader revenue lifecycle, including native integration with Creatio Marketing.

Smart Automation & Triggers

Launch sequences based on behavior, workflow events, or Contact/Lead status changes, run conditional engagement flows.

End-to-End Reporting & Team Performance

Gain full visibility from first touch to Closed-Won, with insights on sequence effectiveness, rep activity, and conversion impact across the entire revenue funnel.

The screenshot displays the Creatio interface for managing a sequence campaign. The left sidebar shows navigation options: Home page, Feed, Leads, Accounts, Contacts, Sequences (selected), Opportunities, Chat, Orders, Invoices, and Contracts. The main content area is titled 'Western Europe campaign' and includes a search bar, 'Add tag', and buttons for '+ Add step', 'Activate', and 'Close'. Below these are 'Feed' and 'Attachments' icons. The campaign details show 'Total steps: 10' and 'Success steps: 3'. The 'Duration' is '16 day'. The 'Title' is 'Draft'. The 'Name' is 'Western Europe campaign'. The 'Type' is 'Outbound'. The 'Owner' is 'John Gold'. There are options to 'Assign to me', 'Sequence ruleset: Default ruleset', and 'Create ruleset'. The main table lists 10 steps with their respective actions and priorities:

Step	Action	Priority
Step 1	LinkedIn: View profile. Day 1.	High
Step 2	Manual email. Day 1.	Medium
Step 3	Call. Day 2.	High
Step 4	Manual email. Day 2.	Medium
Step 5	LinkedIn: Send connection request. Day 4.	High
Step 6	Call. Day 6.	High
Step 7	Call. Day 8.	Low
Step 8	Manual email. Day 10.	Medium
Step 9	Call. Day 13.	High
Step 10	LinkedIn: Send connection request. Day 16.	High

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The screenshot displays the Creatio interface for configuring a sequence campaign. The main view is titled 'Western Europe campaign' and includes a sidebar with navigation options like Home page, Feed, Leads, Accounts, Contacts, Sequences, Opportunities, Chat, Orders, Invoices, and Contracts. The campaign details are as follows:

- Total steps:** 10
- Success steps:** 3
- Duration:** 16 day
- Title:** Draft
- Name:** Western Europe campaign
- Type:** Outbound
- Owner:** John Gold
- Sequence ruleset:** Default ruleset

The main content area shows the sequence steps:

Step	Channel	Delivered	Opened	Clicked	Replies	Priority
Step 1	1. LinkedIn: View profile. Day 1.	100%	65%	25%	10%	High
Step 2	Manual email. Day 1.	100%	65%	25%	10%	Medium
Step 3	Call. Day 2.					High

Each step card includes fields for Title, Description, and Postpone (Days).

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Gain full visibility from first touch to Closed-Won, with insights on sequence effectiveness, rep activity, and conversion impact across the entire revenue funnel.

The screenshot displays the Creatio interface for configuring a multi-step sequence. The main view is titled "Western Europe campaign" and includes a sidebar with navigation options like Home page, Feed, Leads, Accounts, Contacts, Sequences, Opportunities, Chat, Orders, Invoices, and Contracts. The campaign details show 10 total steps, 3 success steps, and a 16-day duration. The "STEPS" tab is active, showing three steps: Step 1 (LinkedIn: View profile, Day 1), Step 2 (Manual email, Day 1), and Step 3 (Call, Day 2). A modal window titled "Add new step" is open, allowing the user to select a channel (Task, Phone call, or Email) and configure the step details, including name, subject, body (with template/snippet/variable options), priority, and postponement.

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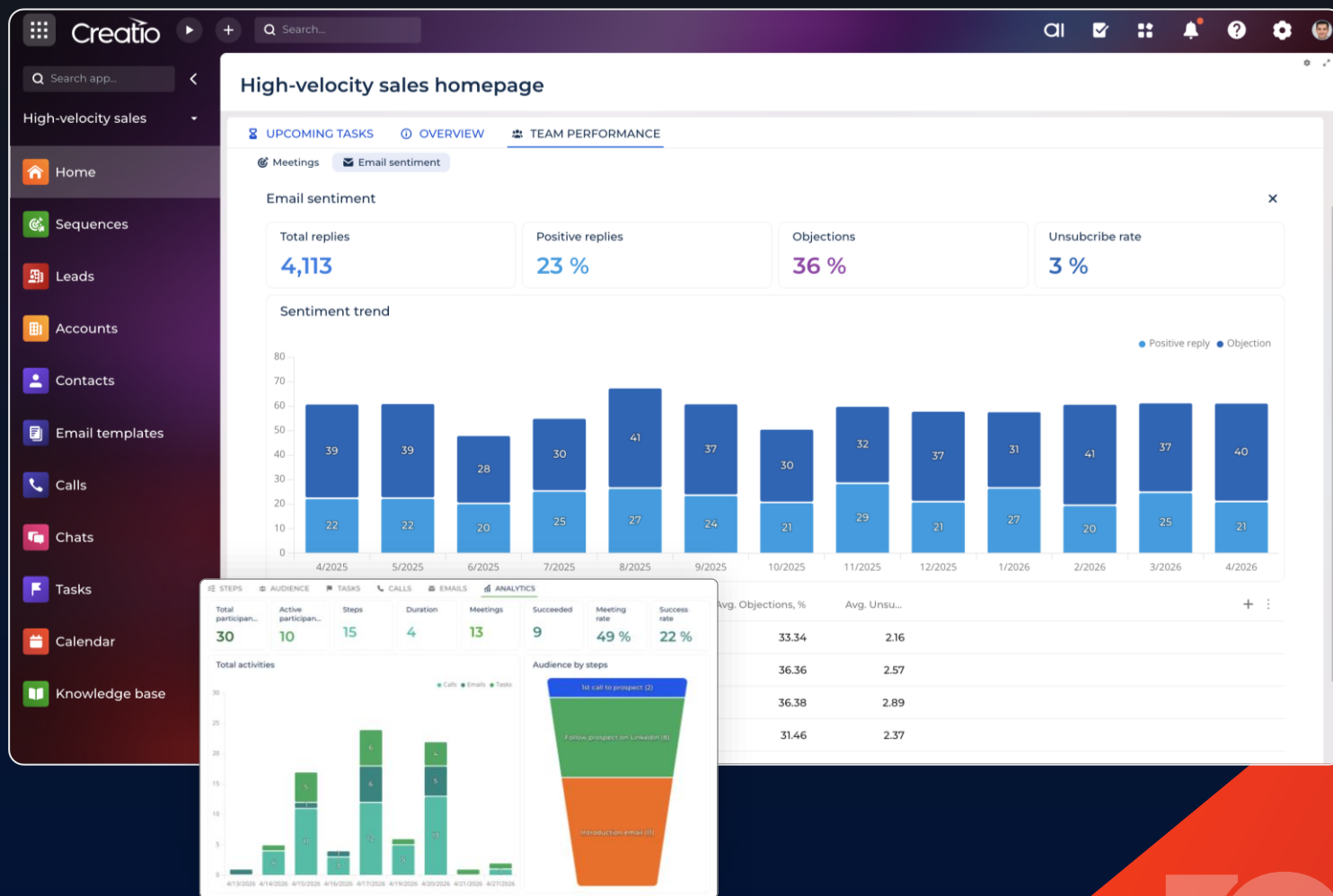
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Chrome Extension for LinkedIn and Sales Navigator

Prospect Directly from LinkedIn & Sales Navigator

Identify and qualify high-fit prospects where sellers already work without context switching

Capture Contacts in One Click into Creatio

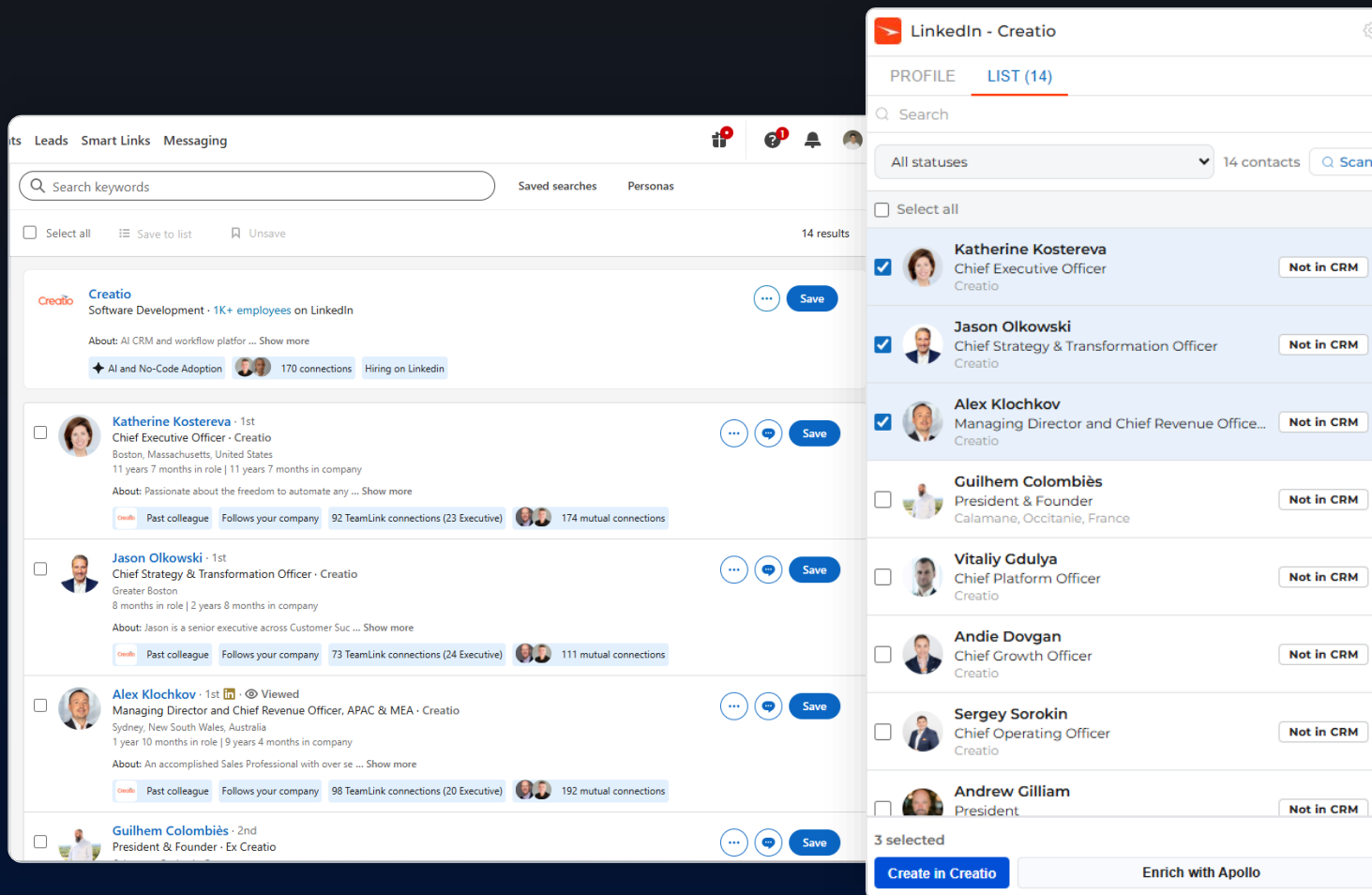
Instantly convert prospects into structured CRM contacts, eliminating manual data entry

Enrich Contacts with External Data

Automatically enhance contact profiles with accurate firmographic and contact data from external data providers (eg Apollo, and ZoomInfo)

Activate Contacts in Sequences Instantly

Seamlessly add enriched contacts into targeted outreach sequences to begin engagement without delay



Sequences Execution Panel

Unified Execution Workspace

Manage and complete all sequence tasks from a single, centralized panel, eliminating context switching and accelerating seller productivity

360° Prospect Context in Real Time

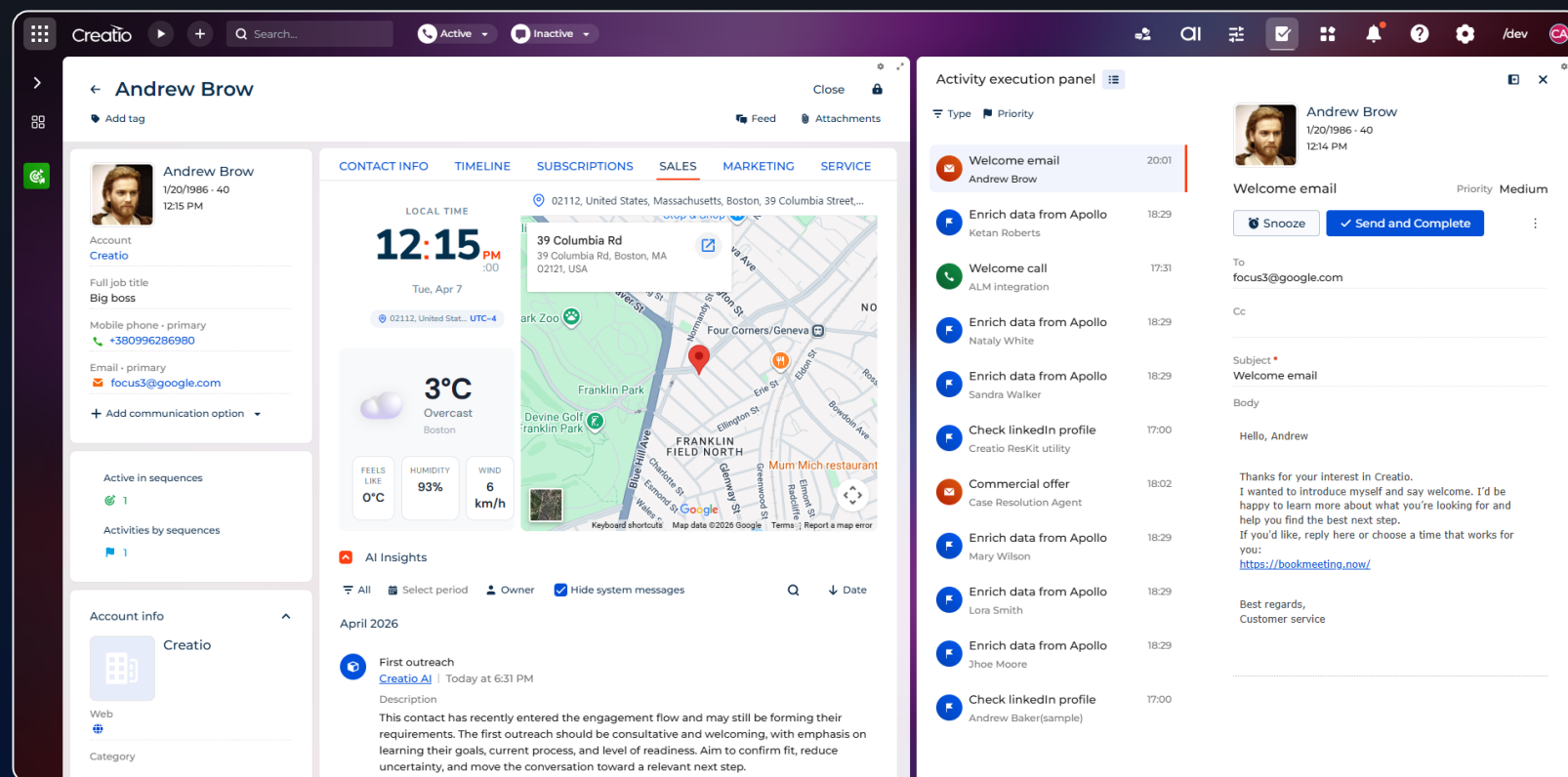
Access complete contact insights, activity history, and enriched data in one view, dynamically updating as you move through sequence steps

Omnichannel Engagement in One Flow

Execute emails, calls, enrichment, and social touches seamlessly within the same interface, ensuring consistent and efficient outreach

AI-Guidance as You Go

Leverage AI to recommend next steps, refine messaging, and help reps engage prospects with higher relevance and confidence



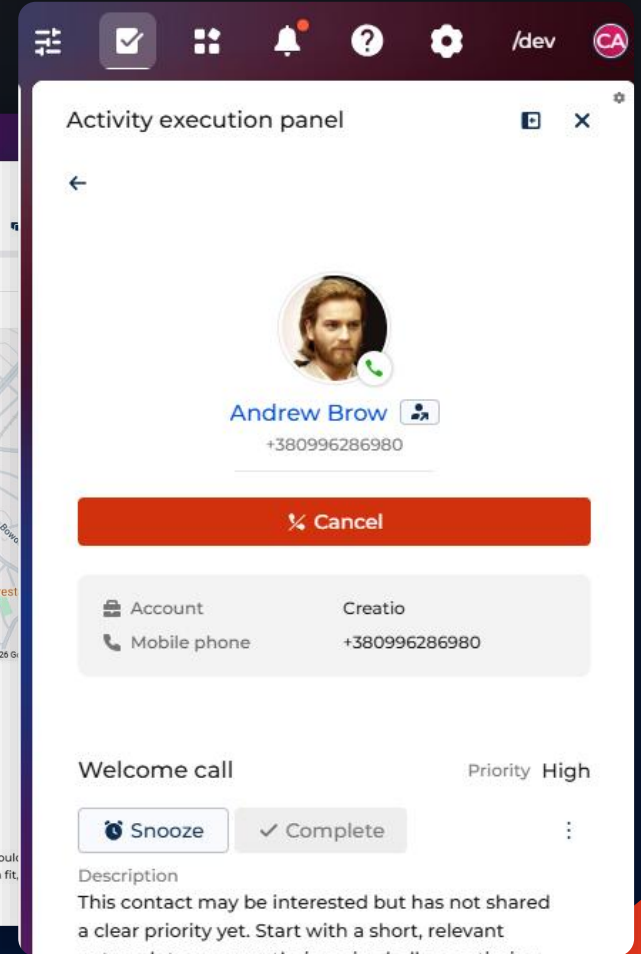
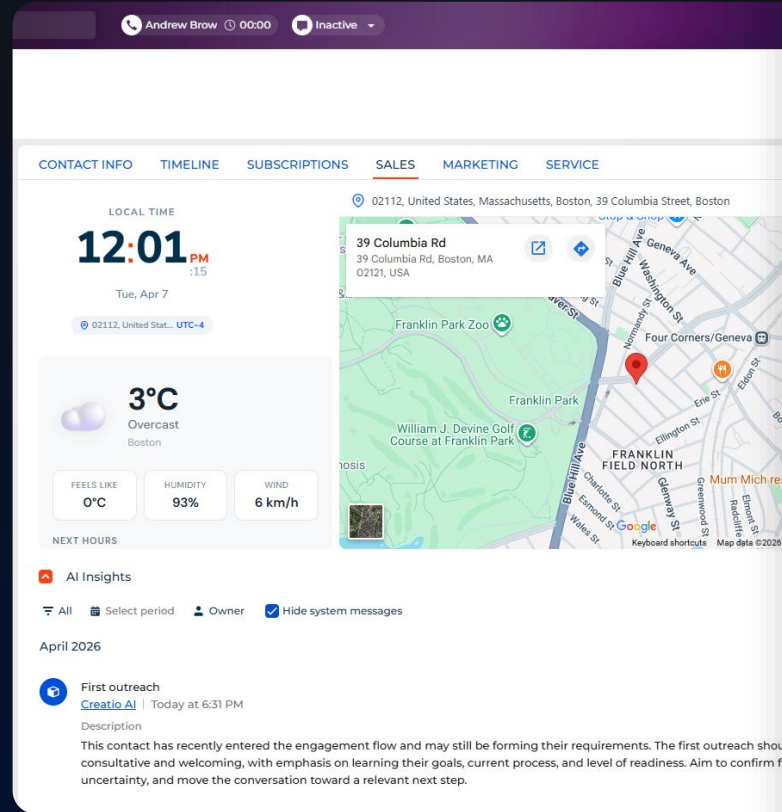
Native Cloud Telephony

Platform-Level Telephony for Any Use Case

Leverage a unified calling capability across sales, service, and beyond, enabling consistent experiences and easy expansion into new business scenarios

AI-Enhanced Conversations

Unlock intelligent features including call transcription, automated voicemails, and actionable conversation insights





Hello, John!

High-velocity sales



Home



Sequences



Leads



Accounts



Contacts



Email templates



Calls



Chats



Tasks

Leads to action

12

Stalled deals

5

Deals to close this quarter

21

Quota attainment

83 %

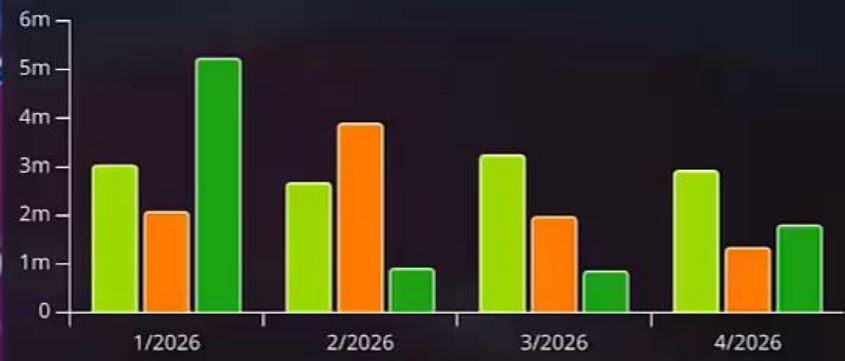
Top opportunities to close

Name	Stage
1 860 / Water catchment / Sunrise...	Engagement
2 1005 / Thermostats / IT-Plus, Sco...	At risk
3 475 / Solar panel monitoring / A...	Committed
4 26 / Water catchment / ExxonM...	Engagement
5 166 / Solar panels / Gateway, Jan...	Contracting
6 495 / Smart lightning systems / ...	Planned
7 1243 / Solar panels / CoinsPaid M...	Proposal
8 770 / Solar panels / Gateway, Sh...	At risk

Planned sales current quarter

\$ 6,121,937

Forecasted revenue dynamics





FUTURE PLANS on Sales Engagement

- AI BDR for Autonomous Execution of Pipeline Generation
- Mobile execution with voice-first scenarios
- More channels: WhatsApp, LinkedIn InMail/Messages
- More Signals: Bombora, ABMs
- More integrations with Sales Intelligence tools: ZoomInfo

Future Plans on **Sales Engagement**

AI BDR for Autonomous
Execution of Pipeline
Generation

Mobile
execution with
voice-first scenarios

More channels:
WhatsApp, LinkedIn
InMail/Messages

More Signals:
Bombora, ABMs

More integrations
with Sales Intelligence
tools: ZoomInfo

Thank you!