



AGENT PLAYBOOK

Thinking of Hiring? Start Deploying Agents.

Prospecting Agent Playbook

Every play maps directly to what a human SDR would own — reactivating lost deals, sourcing cold accounts, and warming Tier 2 pipeline at scale. The difference? Your agent runs it 24/7, personalizes every message, and never misses a follow-up.

3

AGENT PLAYS

24+

RESEARCH SIGNALS

45

DAY MAX WINDOW

01

PLAY 01

Closed Lost
Reactivation

02

PLAY 02

Nurture Play

03

PLAY 03

Tier 2 Account
Warmup

PLAY 01

Closed Lost Reactivation

Win back executive buyers from deals that went dark — 5 emails + 2 optional LinkedIn steps

AUDIENCE SEGMENTS



Closed Lost — 6 Months Ago

- Deal closed lost 3–6 months prior
- No re-engagement or reply since
- Account still ICP-qualified
- Enough time for pain to resurface



Closed Lost to Competitor

- Loss reason = competitor displacement
- Agent leads with competitive differentiation
- Reference new features or pricing changes
- Monitor competitor news for trigger events



Closed Lost — No Show

- Prospect went dark after a booked meeting
- No cancellation — just disappeared
- High-intent signal buried under timing
- Re-engage with low-friction calendar link

TARGET PERSONAS

Executive-level buyers — the original decision-maker or blocker on the lost deal

Chief Revenue Officer (CRO)

Chief Marketing Officer (CMO)

VP of Sales

VP of Marketing

Director of Revenue Operations

Director of Demand Generation

OUTREACH SEQUENCE

STEP	CHANNEL	DAY	DESCRIPTION
1	Email	Day 1	The Honest Re-Intro — "What changed since we last spoke" · Rep reviews before send
2	Email	Day 4	ROI Refresh — New product wins or improvements relevant to their vertical
3	LinkedIn	Day 7	Connection / Message — Direct note referencing the email thread (if capacity allows)

STEP	CHANNEL	DAY	DESCRIPTION
4	Email	Day 10	Peer Story — Customer win from a comparable company that also passed
5	Email	Day 14	The Direct Ask — "15 minutes to see what's new?" + calendar link
6	LinkedIn	Day 17	Follow-up / InMail — Engage on a recent post or InMail (if capacity allows)
7	Email	Day 21	The Break-Up — Closing the loop. Door stays open for when the time is right.

Exit criteria: Agent stops when contact replies, books a meeting, unsubscribes, or 21 days elapse with no engagement.

Nurture Play

Source and prospect new contacts at accounts with no open opportunity — drive inbound engagement or a direct booking

AUDIENCE SEGMENTS



Tier 3 Accounts

- ICP match but lower revenue potential
- No rep assigned or managed territory
- No active outreach in last 180+ days
- Agent is the primary coverage model



Freemium Users

- Active on free plan for 30+ days
- Showing product engagement signals
- Has not started a trial or upgrade
- Drive toward upgrade or expansion CTA



Nurture Stage Deals

- Open opportunity — stalled in nurture
- No rep activity in last 30+ days
- Not ready to buy — needs education
- Agent maintains warmth until rep re-engages

TARGET PERSONAS

Champion and economic buyer — dual-threaded outreach on both contacts simultaneously

VP of Sales

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♦ **Third-Party Data (Recommended):** Connect Apollo.io or ZoomInfo. Enable "Source contacts for me" in the Audience tab. Agent filters by ICP size, industry, and tech stack signals. Excludes customers, open opps, and competitor domains.

OUTREACH SEQUENCE — ADAPTIVE MODE

Agent adjusts timing to live engagement signals

STEP	CHANNEL	DAY	DESCRIPTION
1	Adaptive	Day 1	Signal-Led Opener — Agent leads with a buying signal (funding round, job posting, tech change)

STEP	CHANNEL	DAY	DESCRIPTION
2	Adaptive	Day 5	Value Hook — Connect their signal to a specific outcome your product delivers
3	Adaptive	Day 10	Social Proof — One-liner case study from a peer account in their industry
4	Adaptive	Day 16	CTA: Resource or Demo — Offer an ROI calculator or guide — OR book a 20-min discovery call
5	Adaptive	Day 22	Last Touch — Short close. Keep door open. Offer self-serve or trial link.

Why Adaptive Mode? The agent monitors email opens, website visits, and intent data between steps — adjusting timing and subject lines per contact. Ends on reply, booking, unsubscribe, or 30 days.

Tier 2 Account Warmup

Agent-led pipeline for ICP accounts reps automate but rarely call — adaptive, trust-building at scale

AUDIENCE SEGMENTS



Strong ICP — Top 50 Accounts

- ICP firmographics are a solid match
- Among the top 50 target accounts in territory
- No rep assigned or not a named account
- Too valuable to ignore, not getting rep time



Not Aware of Our Brand

- No website visits from this account
- No engagement with any HubSpot content
- No prior contact in CRM history
- Agent leads with education, not a pitch



No Website Visits

- Zero tracked sessions from account domain
- Not appearing in any intent data tools
- Drive traffic through educational content
- First website visit triggers rep alert

TARGET PERSONAS

Manager and Director level — the practitioners who feel the pain day-to-day and champion tools upward

Sales ManagerMarketing ManagerDirector of SalesDirector of Marketing

Director of Demand GenerationRevenue Operations Manager

OUTREACH SEQUENCE — ADAPTIVE AUTO-SEND · 45-DAY WINDOW

STEP	CHANNEL	DAY	DESCRIPTION
1	Auto	Day 1	Thought Leadership Hook — Relevant article or guide. No hard CTA.
2	Auto	Day 8	Industry Insight — Data point or trend for their vertical + blog post
3	Auto	Day 16	Peer Benchmark — "Companies like yours are doing X" + case study
4	Auto	Day 25	Demo Form Nudge — "See how it works in 10 min" — demo form link
5	Auto	Day 35	Educational Drip Closer — Checklist or assessment. Keep door open.

STEP	CHANNEL	DAY	DESCRIPTION
	Alert	Any time	Signal Trigger — First website visit or demo form fill → sequence pauses, rep notified

WHY THIS WORKS FOR TIER 2

- Reps don't call these — agent = net-new pipeline
- Signal alerts mean reps call warm, not cold
- Content-first builds trust before reps engage
- Surfaces invisible demand at scale

MEASURE — 90-DAY LAG

-  Click-through rate per sequence step
-  Website sessions from Tier 2 contacts
-  Demo form fills attributed to this play
-  Pipeline created from Tier 2 accounts