

ACCOUNT INTELLIGENCE PROSPECT RESEARCH MULTICHANNEL OUTBOUND SALESFORCE

Building a multi-channel prospecting operating system for enterprise B2B software

1,218

prospects prepared across four
campaigns in one documented Austin
workstream

ServicePower needed more than another list of contacts.

The prospecting operation had to determine which companies fit, which ServicePower offering was most relevant to each account, which people should be contacted, whether their data was still accurate, and how qualified prospects should move into email, LinkedIn, calling and the sales team's existing systems.

TheClaygency (TCA) helped build the infrastructure connecting those pieces. The 1,218 prospects matter, but the more important story is what had to exist behind them.

01 — THE BUSINESS PROBLEM

In ServicePower's market, a company matching a broad firmographic profile is not necessarily a useful prospect. Account selection depended on a chain of questions:

What kind of service operation does it run? Does it fit the ICP?

How large is it, and how does it employ technicians?

Which ServicePower product is the strongest fit?

Which people are relevant, and are they still employed there?

Can they be reached by email, LinkedIn or phone?

Which campaign should they enter, and what does sales need when they reply?

Answering only the first few would produce a database. The requirement was to connect the entire chain.

02 — WHY A CONTACT LIST WASN'T ENOUGH

DATABASE FILTER

→

CONTACTS

→

SEQUENCE

A conventional outbound workflow leaves too much unresolved. A company can pass a broad filter but belong in a different segment. A contact can hold the right historical title but no longer work there. An email provider can return an address without enough confidence to send to it. The same account can be relevant to different products for different reasons, and activity is spread across several channels.

~~How do we get more names and emails?~~

How do we create a dependable path from Salesforce account to sales-ready prospect?

Five connected operating layers

01 Account intelligence

The process began with the account, not the email address. Salesforce data was enriched and restructured to support segmentation on revenue, employment model, service-operation type, ICP fit and product relevance. The additional data determined what happened next.

1,690

records in one Salesforce/Clay processing workflow

435

companies classified into a Service-Only Repair segment

02 Product-fit logic

Not every qualified account should receive the same proposition. Relevant products could be ranked per account, so fit became part of the account research instead of a manual decision buried in campaign setup. The record could move beyond "Is this a target account?" to **"What are we most likely to talk to this account about?"**

VISION AI

SERVICEPOWER

PLUSONE

03 Contact discovery and validation

Finding the right people took more than exporting job titles from one provider. Research used multiple sources and fallbacks, then checked current employment, current title, LinkedIn profile, email, phone and company association. Inaccurate people data contaminates every stage that follows.

LINKEDIN

→

APOLLO

→

CLAYGENT / ADDITIONAL RESEARCH

04 Contactability and data quality

A plausible email address is not the same as a sendable contact. Email enrichment used a locked waterfall instead of a single provider, with additional verification on the results. Catch-all emails were not automatically treated as verified; extra verdict data decided which stayed eligible. Phone data was enriched separately for calling. The rule: weak contact data must not become a campaign problem later.

STEP 1 • FIND AN EMAIL

Seven providers, tried in order. If one comes up empty, the next is tried.

Apollo > FullContact > LeadMagic > BetterContact > FindEmail > ICPs > Prosper

→

STEP 2 • VERIFY IT

Every address is verified. Catch-all addresses get a second check before they qualify.

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SENDABLE

Enters a campaign

HELD BACK

Kept out of sending

05 Multichannel activation

Validated prospects then had to reach the right sales motion. The three channels ran as one prospecting operation, with campaign membership, validation, routing and sales context kept coherent as each prospect moved downstream.

EMAIL

Smartlead

LINKEDIN

HeyReach

CALLING

Outreach.io

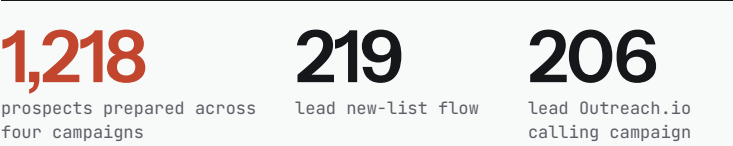
From Salesforce account to sales handoff

01	SALESFORCE ACCOUNTS	
02	ACCOUNT ENRICHMENT	
03	SEGMENTATION	
04	ICP + PRODUCT-FIT LOGIC	
05	COMPANY RESEARCH	
06	CONTACT IDENTIFICATION	
07	EMPLOYMENT + TITLE VALIDATION	
08	EMAIL + PHONE ENRICHMENT	
09	CONTACTABILITY / VERIFICATION	
	EMAIL Smartlead	LINKEDIN HeyReach
	CALLING Outreach.io	
10	REPLY / PROSPECT CONTEXT	
11	ROUTING	
12	SALES HANDOFF	
↻	FEEDBACK INTO THE SYSTEM	

Prospecting was not a one-way assembly line. Problems found in production fed back into account logic, contact research, routing, campaign configuration and data-quality rules.

The Austin workstream

One documented Austin workstream shows the production scale.



Later execution also included Smartlead campaigns and HeyReach activation. These figures should not be added together as separate incremental prospects; each describes a specific piece of the operating work. Together they show the architecture moved beyond design into live campaign operations.

The difficult part was not connecting the tools

Most of these technologies can be connected. That does not make them a reliable system. The difficult work was deciding:

Which field to trust	Which source wins a disagreement
How to classify companies	Which product maps to an account
How to discover contacts	What counts as a usable email
When a catch-all stays eligible	Which campaign a prospect enters
Where a prospect is routed	What context sales receives

Those are operating decisions. The software simply executes them.

Where the assumptions get tested

Source-of-truth problems matter

Different systems can hold different versions of the same account. An incorrect website or domain causes downstream failures in research, contact matching, email enrichment, technology detection and personalization.

The work included source-of-truth correction instead of assuming every CRM field was authoritative. ZoomInfo served as an important company-data source, alongside Apollo and other research methods. The aim was not to maximize providers, but to resolve the account accurately enough for the next decision.

Production exposed edge cases

The system did not become correct because the first workflow ran. Real production created exceptions:

ROUTING PROBLEMS

INCORRECT REGIONAL ASSIGNMENT

REVALIDATION

PROVIDER DISAGREEMENTS

CAMPAIGN CHANGES

APPROVAL DEPENDENCIES

PER-ACCOUNT CONTACT LIMITS

EMEA records were at one point routed incorrectly and had to be corrected. Email quality required continuing monitoring, cleanup and re-pushing of validated records. Calling workflows kept manual steps where that worked better.

Build ≠ Operate

This is why TCA separates build from operate. A workflow can look correct in a diagram and still fail when exposed to thousands of real records. Production is where those assumptions get tested.

Deliverability was part of the system

Sending infrastructure was not the final button at the end of research. The operation included bounce monitoring, email validation, additional verification, open-rate monitoring, cleanup of problematic records and re-pushing contacts after validation.

Research quality and deliverability are connected. Bad prospect data eventually becomes a sender-reputation problem.

The salesperson still matters

The aim was not to automate every human action out of the process. Calling, account judgment and sales conversations still required people. The infrastructure was designed to make them better informed, through reply context, AE summaries, routing, sales handoff and SDR enablement. Loom walkthroughs helped operators understand parts of the process.

AUTONOMOUS OUTBOUND

Better infrastructure for human selling.

What changed

Before, prospecting was spread across individual tools and decisions: someone built a list, someone enriched it, someone chose a campaign, someone noticed bad email data, someone worked out who owned the response. The work here created an explicit operating chain.

ACCOUNT DATA	ACCOUNT INTELLIGENCE	SEGMENTATION + PRODUCT FIT	VALIDATED PEOPLE	CHANNEL-READY PROSPECTS	SALES ACTIVITY + HANDOFF
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That operating chain is the product.

Prospecting is infrastructure.

The 1,218 prospects are the visible output of a much larger system: Salesforce account data, research, qualification, segmentation, product mapping, people discovery, employment validation, email waterfalls, phone enrichment, deliverability rules, campaign routing, multiple activation channels, reply context and sales handoff. A contact list is one artifact inside that system. It is not the system itself.

PRODUCTION WORK DELIVERED

1,690

records processed in a Salesforce/Clay workflow

435

companies classified as Service-Only Repair

1,218

prospects prepared across four Austin campaigns

3

live channels: email, LinkedIn and calling

Account-first

Segmentation and product fit settled before a single contact is sourced.

Data you can send to

A seven-provider email waterfall with verification and catch-all checks.

One operation, three channels

Email, LinkedIn and calling run from the same research, routing and context.

Built to be owned

Built inside your organization, proven in production, handed to your team.

Technology

SALESFORCE	CLAY / CLAYGENT	ZOOMINFO	APOLLO
FULLCONTACT	LEADMAGIC	BETTERCONTACT	FINDEMAIL
ICPS	PROSPER	ENRICHLY	SMARTLEAD
HEYREACH			
OUTREACH.IO			

Plus supporting enrichment, verification and workflow logic. The stack was substantial, but what makes this case important is the operating architecture connecting it.

The broader principle

Sales teams do not need twelve disconnected prospecting tools. They need a system that can answer, in order:

- 1 Is this the right company?
- 2 What might we sell them?
- 3 Who should we speak to?
- 4 Can we trust the contact data?
- 5 How should we reach them?
- 6 Who owns what happens next?

The software can change. Those operating questions remain. That is the system TCA builds.

Build the system, not just the table.

TCA builds sales research and prospecting operations for established B2B companies. We build the infrastructure inside your organization, operate it against the real market, and prepare your team to own it.

SEE IF YOUR COMPANY IS A FIT →

theclayagency.com