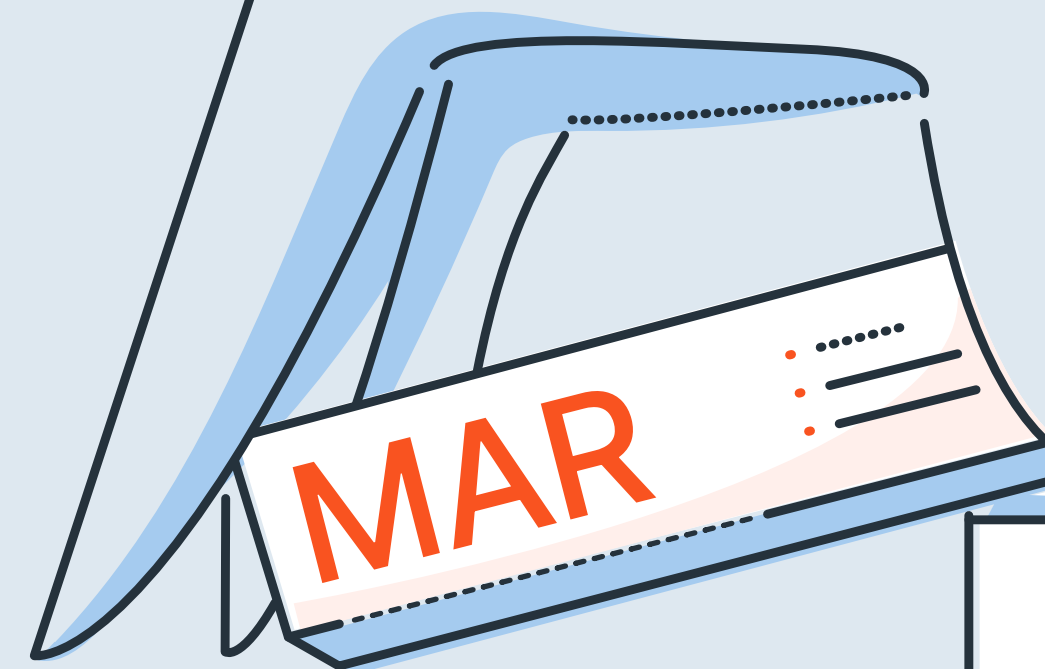
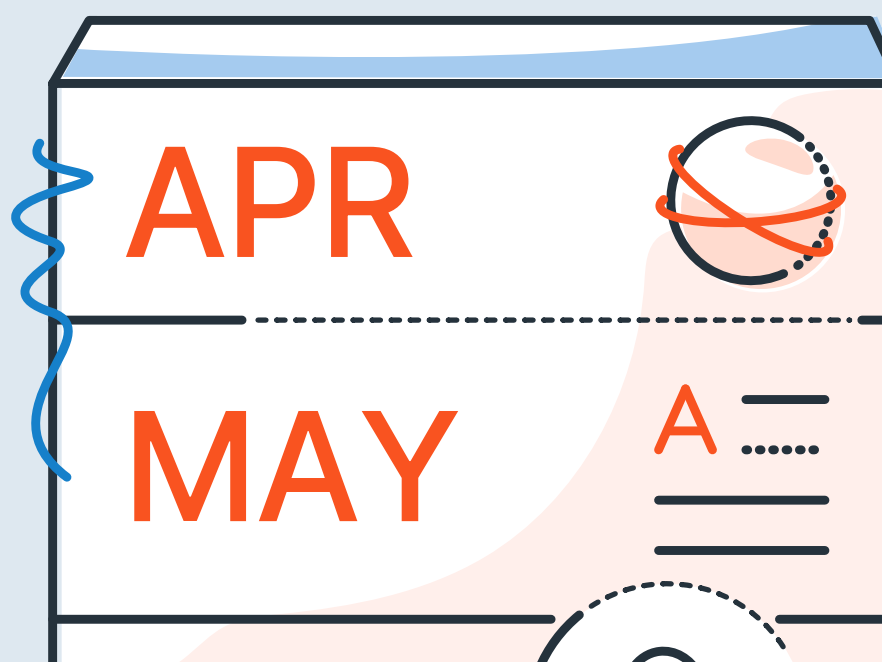
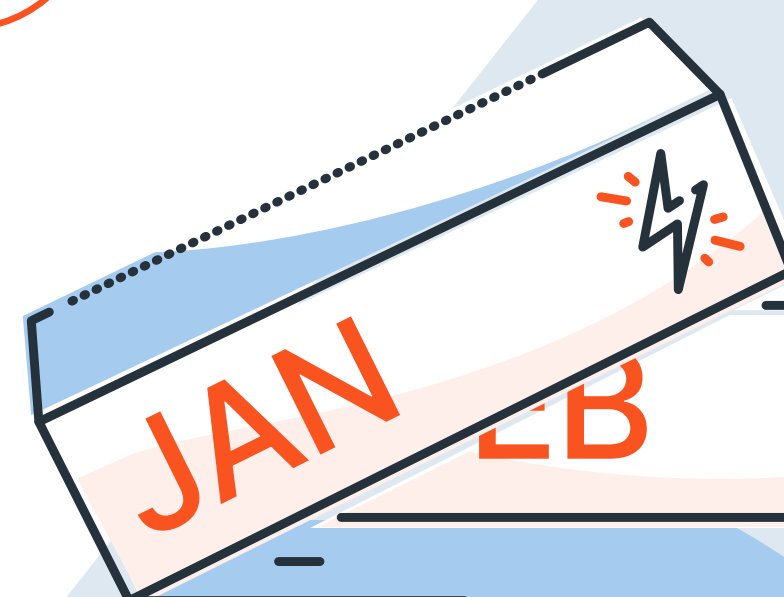
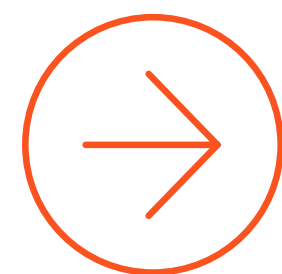




Outreach Planner

Mapping 12 months of email outreach
Your year-round outreach system



Introduction

What's inside this Outreach Planner?

A 12-month system for B2B email outreach, built around how buyers buy, with guidance on how to build relationships with your target audience that keep you top of mind through the busiest and quietest periods of their year.

This planner runs on:

Lists

Messages

Relationships

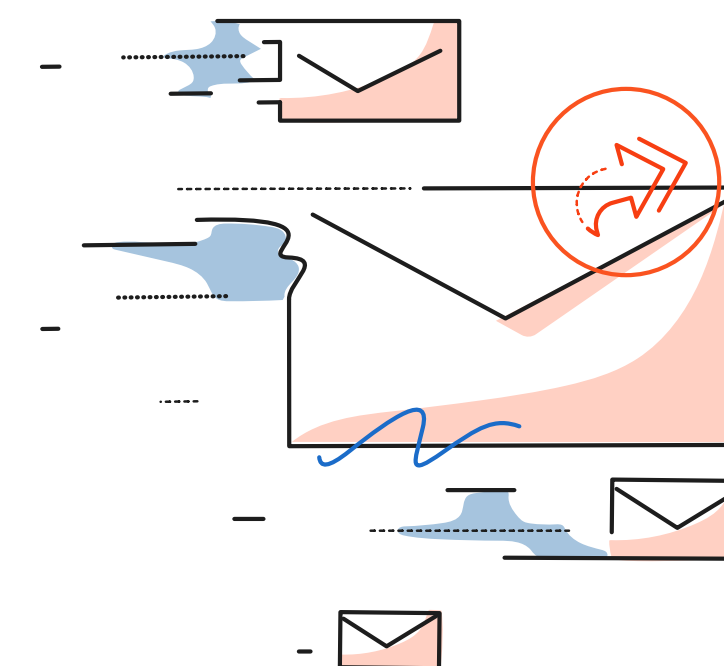
Learning



Read the data behind this planner
[State of Email Outreach](#)

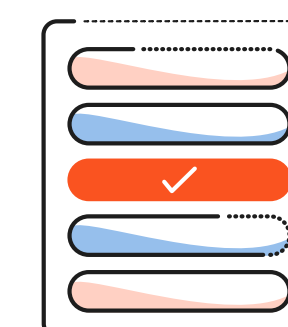


Performance benchmarks



4.5%

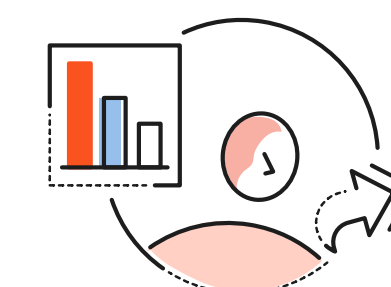
Avg reply rate on cold outreach



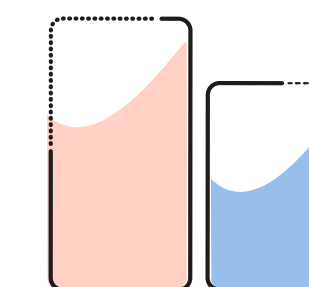
+158%
reply lift
on < 100
contact
lists



67%
open rate on
personalized
subjects



3.3-6.8%
reply rate,
value-first
sequences



22%
annual email
data decay

Foundations | The system

Outreach is an engine

Outbound is not a one-and-done activity you turn to when you need leads.

To generate leads, you need four engines running at once.

Lists determine your message. Your message builds a relationship. Your relationships show what works.

Outbound is not a campaign.
It is the engine that runs all year.

The four engines



1. Lists

Builds, segments, and verifies contacts to make outreach relevant.



2. Message

Tests one variable at a time to find the messaging that earns replies.



3. Message

Keeps you top of mind with valuable content that goes beyond sales.



4. Learning

Tracks opens, replies, and what messages you use more of.

Foundations | How to use

How to read each month's plan

Every month in this planner provides actions telling you what to do, how to do it, and when to do it.

The “read more” callouts offer more detail, with examples and detail to help you execute each month's tasks.

1 **Buying mode:** What buyers are doing this month

2 **Sequence type:** Direct, value-first, relationship, or experiment

3 **Context:** Why this month and why this audience?

4 **Priority actions:** What you need to do this month

5 **Benchmark:** What good looks like

6 **Health check:** What to check before next month

Quarter 1 | Month 1
Direct outreach

1
Final approval
[Read more →](#)

2
Three-list sequence to fresh-budget buyers

3
What buyers are doing
Active and budget-aware with energy to make decisions. Some have named the problem, some are evaluating, but all are reachable.

4

Action 1
Build three lists

- Target audience
- Competitor switchers
- Hiring signals

Action 2
Send the sequence

- 3 touchpoints, plain text

Action 3
Optimize infrastructure

- Run deliverability checker

5
What good looks like
2-4% reply rate on a fresh list. Above 2% bounce rate, re-verify

6
Health check
Verify every send list before launch

Next Q1 | Month 2

Foundations | At a glance

Four concepts in the planner

Buying modes [Read more →](#)

The buyer's state of mind when you email. Match your sequence to where they are in their journey, not where you wish they were.

Problem identification

Researching solutions

Evaluating options

Final approval

Competitor displacement

Sequence types [Read more →](#)

The four types of sequence you'll run across the year, each mapped to a buying mode.

Direct outreach

Relationship builder

Value first

Experiment

Buyer personas [Read more →](#)

The four people you need to reach inside every target company. Account expansion ensures you find them one at a time.

Pain feeler

Budget holder

Blocker

Champion

List types [Read more →](#)

Six angles for building lists that outperform generic ICP filters.

Target audience

Competitor switches

Technology

Hiring signals

Conference contacts

Research participants



Year View

Outbound plan

The year ahead

Q1 The highest-intent buying window of the year

- M1** **Final approval** Three lists: target audience, competitor switchers, and hiring signals.
- M2** **Evaluating options** Case study to non-responders. Find 2nd contact at M1 companies.
- M3** **Researching solutions** Roundtable for engaged leads. Find 3rd contact at M1 companies.

Q2 Cracks show with Q1 buyers, and carryovers ready to buy

- M1** **Competitor displacement** Switcher sequence + new leadership signals + Q1 conference contacts.
- M2** **Final approval** Second touch to engaged Q1 leads. Find 2nd contact at Q2 M1 companies.
- M3** **Problem identification** Research to engaged Q1 leads. Find 3rd contact at Q2 M1 companies.

Q3 Less noise in inboxes

- M1** **Problem identification** Lookalike experiment + research to engaged Q2. Find 4th contact at Q2 M1 companies.
- M2** **Researching solutions** Case study to 4th contact at engaged Q1 + 2 companies. Find 2nd contact at Q3 M1 companies.
- M3** **Final approval** Direct outreach to warm Q3 + refreshed target audience. Find 3rd contact at Q3 M1 companies.

Q4 Close the year by giving yourself the best start to the next

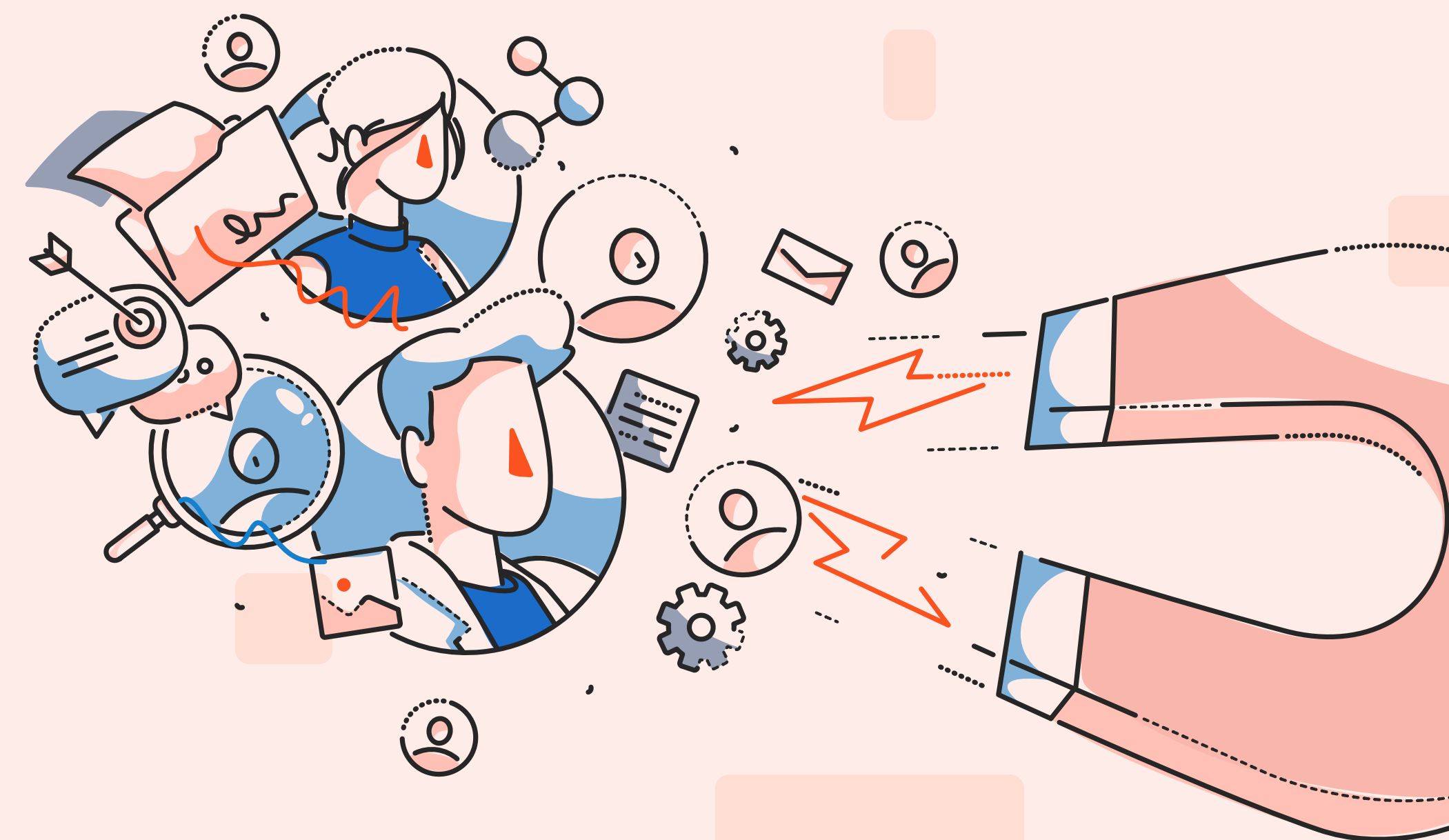
- M1** **Evaluating options** Urgency to engaged Q3 + calculator to Q1 + Q2 engaged + expansion.
- M2** **Final approval** Roundtable to engaged Q3. Plan next year's lists.
- M3** **Problem identification** Personal check-ins. Confirm Q1 calls. Build next year's lists.

Quarter 1 of 4 | What's ahead

Quarter 1

This is one of the **highest-intent buying windows of the year**. Budgets are confirmed, plans are in motion, and decision makers are looking for tools to solve problems. Your goal is to be in the inbox the day a decision gets made. That requires verified lists, proof you can solve the problem, and a question that takes less than ten seconds to answer.

Inside this quarter



Month 1

Final approval

 Direct outreach

Three list sequence: target audience, competitor switchers, and hiring signals.

Month 2

Evaluating options

 Value first

Case study to non-responders. Find 2nd contact at M1 companies.

Month 3

Researching solutions

 Relationship builder

Roundtable for engaged leads. Find 3rd contact at M1 companies.

Quarter 1 | Month 1



Direct outreach



Budget holder

[Read more →](#)

Final approval

Three-list sequence to fresh-budget buyers

What buyers are doing

Active and budget-aware with energy to make decisions. Some have named the problem, some are evaluating, but all are reachable.

Action 1

Build three lists

Create three lists of 50-100 leads each.

- Target audience [via Discover](#)
- Competitor switchers via [Technology filter](#)
- Hiring signals via [Signals](#)
- Verify all leads before sending

Action 2

Evaluating options

Same three-touch pattern across all three lists.

- Plain text only intro email
- Stop-on-reply active
- Send during business hours
- Run [Deliverability Checker](#) first

Action 3

Researching solutions

Tools the rest of the year builds on.

- Install the [Hunter Chrome extension](#)
- Optional: Build a list of newly funded companies
- Capture Q1 reply rate as benchmark
- Plan account expansion targets



What good looks like

2-4% reply rate on a fresh first list. Above 2% bounce rate, stop and re-verify.



Health check

Verify every list before sending.

[Get your lists to 100-recipients](#)



Next: Q1 | Month 2 →

Quarter 1 | Month 2



Value first



Pain feeler



Budget holder

[Read more →](#)

Evaluating options

Case study to non-responders

What buyers are doing

Anyone who didn't reply in Month 1 needs a reason to look again as they shortlist, so you'll share useful content to earn it.

Action 1

Send a case study

Useful content to M1 non-responders who opened or clicked.

- Filter on M1 Status = Opened or Clicked
- Case study, calculator, or one finding
- One sentence on relevance, one on content
- Low-friction CTA: "Worth a look?"

Action 2

Find the pain feeler

Account expansion at Q1 Month 1 companies. One more contact.

- [Domain Search](#) on M1 sent companies
- Target the end-user, not decision-maker
- Write fresh copy for the new role
- One contact per company at a time

Action 3

Strengthen the engine

Hunter in your AI workflow and a clean sending domain.

- Install [Hunter MCP](#) in your AI tools
- Run [Deliverability Checker](#)
- Fix any critical issues before sending
- Bookmark deliverability checker for monthly use



What good looks like

20-30% open rate, 3-5% reply rate. Opens below 20%, check your deliverability.



Health check

Remove Month 1 bouncers. Verify second contacts.

[How to personalize emails with AI](#) →

Next: Q1 | Month 3 →

Quarter 1 | Month 3



Relationship builder



Budget holder



Blocker

[Read more →](#)

Researching solutions

Roundtable invite to slow movers

What buyers are doing

Closing with other vendors, now is the time to build the relationship with an opportunity to connect with their peers.

Action 1

Send the invite

Choose an invite to ensure you stand out from the rest of the direct sales outreach leads get.

- Filter: M1 sequence, Status = Sent
- Options: roundtable, podcast, or survey
- [A/B test the invite](#) format
- Personalize the opener to their role

Action 2

Find the blocker

Account expansion at Q1 Month 2 companies. The third contact.

- [Domain Search](#) on M1 sent companies
- Target legal, IT, or finance peer
- Track third contacts in a separate list
- A/B test the third-angle approach

Action 3

Build Dynamic Lists

Segment contacts based on sequence interactions.

- Apply “Sending status” filter in Leads
- Bouncers, openers, repliers, and never-contacted
- Re-verify decision-makers list
- [Verify CRM](#) data before Q2



What good looks like

5-8% reply rate on roundtable, podcast, or survey invites.
Below 5%, the topic or format is the issue.



Health check

Remove M2 bouncers.
Verify third contacts & CRM data.

[What to do if your bounce rate is above 3%](#) →

Next: Q2 overview →

Quarter 2 of 4 | What's ahead

Quarter 2

Two opportunities appear: the tools bought in Q1 are showing cracks and the Q1 slow movers are ready to act. Prospect both the buyers who chose wrong and the buyers who almost chose you.

Inside this quarter

Month 1

Competitor displacement

 Direct outreach

Switcher sequence + new leadership signals + Q1 conference contacts.

Month 2

Final approval

 Direct + Value first

Second touch to engaged Q1 leads. Find 2nd contact at Q2 M1 companies

Month 3

Problem identification

 Relationship builder

Second touch to engaged Q1 leads. Find 3rd contact at Q2 M1 companies.



Quarter 2 | Month 1

 Direct outreach

● Budget holder

● **Champion**
[Read more →](#)

Competitor displacement

Switcher sequence to displaced buyers

What buyers are doing

Three months in with a competitor and the cracks show. Ask the questions their solution isn't answering, and show how yours does.

Action 1

Send the switcher sequence

Competitor-aware angle to switchers and Q1 unengaged.

- [Technology filter](#) in Discover
- Cross-reference Q1 unengaged leads
- Reference review-site and Reddit gaps
- 3-touchpoint plain text, stop-on-reply

Action 2

Layer leadership + events

Two parallel plays alongside the switcher list.

- New VPs via [Hunter Signals](#) (90-day window)
- Q1 conference contacts via [Bulk Email Finder](#)
- 30-50 contacts each, separate sequences
- One angle per audience

Action 3

Find the champion

Account expansion at Q1 Month 1 companies.

- [Domain Search](#) on M1 sent companies
- Target champion or budget holder
- Reference the contact you've engaged
- Track in a [separate list](#)



What good looks like

3-5% reply rate on switcher lists. Bounce above 2%? Stop sending and re-verify.



Health check

Remove Q1 M3 bouncers.
Verify every switcher list address.

[How to find emails from an event attendee list](#)



Next: Q2 | Month 2 →

Quarter 2 | Month 2



Direct + Value first



Pain feeler



Budget holder

[Read more →](#)

Final approval

Second-touch to Q1 carryovers

What buyers are doing

Q1 carryovers are getting closer to converting, so give them a timely offer to nudge them towards a conversion.

Action 1



Re-engage Q1 leads

Second sequence with a new angle to Q1 engaged.

- Filter: Q1 sequences, Status = Opened/Clicked
- Re-verify the list before adding
- Reference what you sent in Q1
- 3-touchpoint plain text, stop-on-reply

Action 2



Find the pain feeler

Account expansion at Q2 Month 1 companies.

- [Domain Search](#) on Q2 M1 sent companies
- Target the end-user, not decision-maker
- One contact at a time per company
- A/B test the angle

Action 3



Sharpen the engine

Test next year's subject lines.
Clean your domain.

- Hunter [Subject Line Tester](#)
- Run [Deliverability Checker](#)
- Refresh sending domain if needed
- Carry winners into Q3 sequences



What good looks like

Up to 46% reply rate lift when reaching second contacts via account expansion.



Health check

Remove Q2 M1 bouncers.
Verify all second contacts.

[Learn how AI could be interpreting your emails](#)



Quarter 2 | Month 3



Relationship builder



Budget holder



Blocker

[Read more →](#)

Problem identification

Research survey to engaged leads

What buyers are doing

Engaged Q1 leads are getting ready to close, so give them a reason to engage with you via research.

Action 1



Send the survey

Soft, useful touch to your warmest contacts of the year.

- Filter: Q1 sequences, Status = Opened/Clicked
- Three to five questions, five minutes max
- Promise to share results
- A/B test survey vs. interview request

Action 2



Find the blocker

Account expansion at Q2 month 1 companies.

- [Domain Search](#) on Q2 M1 sent companies
- Target legal, IT, or finance peer
- Build a separate list for blockers
- A/B test which angle resonates

Action 3



Build clean Q1+Q2 lists

Segment engaged and unengaged for Q3 experiments.

- Engaged leads (opened/clicked) re-verified
- Unengaged leads in a separate list
- Repeat for Q1 and Q2 separately
- Ready for Q3's quiet tests



What good looks like

6-8% reply rate from your warmest contacts yet. Below that, check your message or infrastructure.



Health check

Remove Q2 M2 bouncers.
Re-verify non-engaged Q1 leads.

[Get ahead of email rejections](#)



Next: Q3 overview →

Quarter 3 of 4 | What's ahead

Quarter 3

While your competitors go quiet, **you won't...** You'll find the buyers who are active, with quieter inboxes. You'll build relationships that get you onto Q4 shortlists. Use Month 1 + 2 to test angles and repurpose your best content. By Month 3, buying energy returns and direct outreach wins.

Inside this quarter

Month 1

Problem identification

Experiment + Relationship

Lookalike experiment + research to engaged Q2. Find 4th contact at Q2 M1 companies.

Month 2

Researching solutions

Value-first + Experiment

Case study to 4th contact at engaged Q1 + 2 companies. Find 2nd contact at Q3 M1 companies.

Month 3

Final approval

Direct outreach

Direct outreach to warm Q3 + refreshed target audience. Find 3rd contact at Q3 M1 companies.



Quarter 3 | Month 1



Experiment + Relationship



Budget holder



Champion

[Read more →](#)

Problem identification

Lookalike test + research survey

What buyers are doing

Senior people are on holiday, but a part of your audience is reviewing what's not working, and are receptive to thoughtful content.

Action 1



Run a lookalike test

Test new angle on fresh lookalike of Q1 engaged.

- Build via chat in [Discover AI Assistant](#)
- Same industry, size, role as Q1 engaged
- [A/B test new angle](#) vs. your standard
- 50-100 contacts, note what works

Action 2



Send a research request

Soft touch to your warmest Q2 contacts.

- Filter: Q2 sequences, Status = Opened/Clicked
- [Re-verify the list](#) before adding
- Survey vs. interview request A/B test
- 2-3 touchpoints max

Action 3



Find the champion

Account expansion at Q2 Month 3 companies.

- [Domain Search](#) on Q2 M1 sent companies
- Target champion or budget holder
- Reference outcomes: pipeline, revenue, risk
- One contact at a time per company



What good looks like

2-3% reply rate on lookalikes. 6-8% on research requests to engaged contacts.



Health check

Verify lookalike list. Build clean engaged/unengaged Q1+Q2 lists

[Why you need to A/B test emails](#)



Next: Q3 | Month 2 →

Quarter 3 | Month 2



Value-first + Experiment



Budget holder



Blocker



Champion

[Read more →](#)

Researching solutions

Repurpose case study to engaged leads

What buyers are doing

Buyers in research mode for a Q4 purchase are reading, comparing, and shortlisting. Give them a reason to trust you.

Action 1



Repurpose your case study

Content reactivation to anyone who engaged but never booked a call with you.

- Filter: Q1+Q2, Status = Opened/Clicked
- One email, [plain text](#), no URLs or files
- Frame: “Reminded me of you”
- Low-friction CTA: “Worth a call?”

Action 2



Find the fourth contact

Account expansion at Q1+Q2 engaged companies.

- [Domain Search](#) on Q1+Q2 engaged
- Use the new angle from Q3 M1
- Tailor to blocker, budget, or champion
- One contact per company at a time

Action 3



Set the hiring Signal

Q4 list-engine work. Hiring is a buying signal.

- [Create a Signal](#) for your target audience
- Save decision makers at hiring companies
- Run [Deliverability Checker](#)
- Build the list now for Q4 M1 urgency



What good looks like

5-8% reply rate on content reactivation. Below 5%, look at your framing.



Health check

Remove Q3 M1 bouncers.
Verify all second contacts.

[Why links spike bounce rates](#)



Next: Q3 | Month 3 →

Quarter 3 | Month 3

 Direct outreach

● Budget holder

● Blocker

[Read more →](#)

Final approval

Two-list direct outreach to close the quarter

What buyers are doing

Active and budget-aware with shortlists in hand. The highest-intent window of the second half of the year.

Action 1



Run two lists in parallel

Warm Q3 engaged + refreshed target audience.

- Warm: Q3 engaged, reference what you sent
- Refreshed: [New Discover list](#), verified only
- 3-touchpoint plain text sequence
- Stop-on-reply active

Action 2



New leadership play

90-day window for VPs and Heads joined recently.

- Hunter [Signals](#) or Discover for new leaders
- Filter for joined in last 60 days
- 30-50 contacts max
- Angle: congrats + 90-day insight

Action 3



Find the blocker

Account expansion at Q3 Month 1 companies.

- [Domain Search](#) on Q3 M2 sent companies
- Target legal, IT, or finance peer
- Reference engaged contact you have
- A/B test the third-angle approach



What good looks like

4-6% reply rate if Q3 experiments worked. Below 4%, use the AI Writing Assistant.



Health check

Remove Q3 M2 bouncers. Re-verify non-engaged Q1, Q2, Q3 leads.

[How to earn more replies](#)



Next: Q4 overview →

Quarter 4 of 4 | What's ahead

Quarter 4

The last buying window of the year where final shortlists and year-end pressure mean the engaged leads you built up all year are at the front of the line. Month 3 is your chance to check-in and carry warm relationships into next year.

Inside this quarter

Month 1

Evaluating options

 Direct + Value-first

Urgency to engaged Q3 + calculator to Q1+Q2 engaged + expansion at Q3 M3.

Month 2

Final approval

 Direct + Relationship

Roundtable, research, or podcast invite to engaged Q3. Plan next year's lists.

Month 3

Problem identification

 Relationship builder

Personal check-ins. Confirm Q1 calls. Build next year's lists. Year-end review.



Quarter 4 | Month 1



Direct + Value-first



Budget holder



Champion

[Read more →](#)

Evaluating options

Urgency sequence + calculator play

What buyers are doing

Buyers who have engaged with you across the year are finalizing decisions and prepping for next year.

Action 1



Urgency to engaged Q3

Direct, time-anchored close to your hottest leads.

- Filter: Q3 sequences, Status = Opened/Clicked
- Reference the engagement you saw
- Anchor: onboarding capacity, Q1 slots
- “15-minute call this week or next?”

Action 2



Calculator to engaged Q1+Q2

Self-serve action for leads not ready for a call.

- Filter: Q1+Q2, Status = Opened/Clicked
- Exclude anyone in the Q3 engaged list
- Calculator, scorecard, or short quiz
- Frame: “What is X costing you?”

Action 3



Find the champion

Account expansion at Q3 Month 3 companies.

- [Domain Search](#) on Q3 M1 sent companies
- Target champion or budget holder
- Reference outcomes, e.g. NRR, pipeline, and risk
- One contact at a time



What good looks like

6-10% reply rate from your warmest contacts. Below 6%, the message is the issue.



Health check

Remove Q3 M3 bouncers.
Bounce above 2%? Re-verify the list.

[How to use AI to write emails in your voice](#)



Next: Q4 | Month 2 →

Quarter 4 | Month 2



Direct + Relationship

● Budget holder

[Read more →](#)

Final approval

Year-end invite to engaged Q3

What buyers are doing

Last calls of the year are happening now. Anyone still evaluating wraps up here or carries into Q1. Hold the door open.

Action 1



Send the invite

Roundtable, year-end research, or podcast invite to engaged Q3.

- Filter: Q3 sequences, Status = Opened/Clicked
- Exclude anyone reached in Q4 M1
- Options: roundtable, research, or podcast
- Share previous output as proof

Action 2



Plan next year's lists

Lowest-risk planning month. Set up next Q1 M1.

- Three lists: target audience, switchers, and hiring
- Optional fourth: funding announcements
- Set [Signals](#) for hiring and leadership
- Best subject lines become defaults

Action 3



A/B test invite formats

Learn which relationship play wins for next year.

- Use [Hunter Sequences](#) to A/B test
- One variable: format or topic
- Run for 50+ recipients minimum
- Measure by reply rate, not opens
- [Calculate your outreach needs](#)



What good looks like

5-10% reply rate on roundtable, research, or podcast invites to engaged Q3.



Health check

Remove Q4 M1 bouncers.
Re-verify warm Q3 lists.

[How to use Discover to build your next lists](#)



Next: Q4 | Month 3 →

Quarter 4 | Month 3



Relationship builder

● Pain feeler

● **Champion**
[Read more →](#)

Problem identification

Personal check-ins to your best relationships

What buyers are doing

Most buyers are taking a break, so few new purchases will happen here, but it does mean you have a chance to add a personal-touch to the end of the year and ensure you have a call to start off the next.

Action 1



Send check-ins

Short, personal email to your warmest leads.

- Filter: All sequences, Opened/Clicked/Replied
- Exclude existing customers
- One specific reference to their year
- “If I can help as you plan, just reply”

Action 2



Build next year’s foundation

Confirm Q1 calls. Build next year’s Q1 M1 lists.

- Confirm pre-booked Q1 calls
- Build audience, switcher, hiring lists
- Lookalikes from this year’s engaged
- [Schedule sequences](#) for Q1 launch

Action 3



End-of-year review

Feed the year’s data into next year’s defaults.

- Best subject lines, opening lines, and CTAs
- List decay rates and bounce trends
- Run [Deliverability Checker](#)
- Sync year’s enrichments to CRM



What good looks like

Output this month is a ready Q1 plan, not reply rates.



Health check

Remove Q4 M2 bouncers. Re-verify all engaged lists. Sync CRM.

[GenAI for outreach analysis](#)



Next: Best practices →

Best practices | Standards and troubleshooting

Rules that apply to every sequence

Six standards guide every action in this planner:

1 List quality

What every send list needs before launch

- Verify before sending. Under 2% bounce target.
- Re-verify lists older than 90 days
- 50-100 contacts beats 500+ by 158%
- Accept-all addresses in a separate list

2 Sequence structure

How every sequence runs

- 3-touchpoint default, all in same thread
- First email plain text with no HTML, links, or images.
- One CTA per email, same across sequence
- Stop-on-reply active. No exceptions.

3 Reply handling

What to do when they reply

- Positive: reply within 3 hours, send link
- Soft: one short reply, low-friction CTA
- Gone quiet: one bump at 7 days
- "Remove me": honor immediately

4 Targeting

Who you reach and in what order

- Decision-maker first, expansion second
- Never two contacts at one company at once
- Use Signals over generic ICP filters
- One angle per role: champion, pain, blocker

5 Testing

How to learn what works

- One variable at a time. Subject OR body.
- 50+ recipients per variant minimum
- Measure by reply rate, not opens
- Q3 is the best month to test

6 Zero replies?

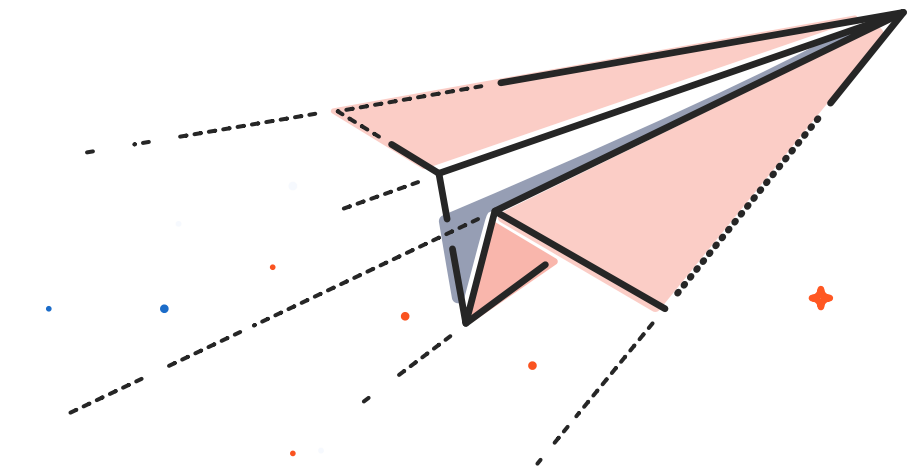
Easiest fix first, hardest fix last

1. Inbox: opens under 20%? Deliverability.
2. List: right role, size, and mode?
3. Message: subject OR body, not both
4. Timing: Am I matching the buyer mode?

Get started

Run this planner

Start your engine



Everything in this planner runs on Hunter. Find target companies, verify contacts, run sequences, and learn what works. Create your free account and run your end-to-end outreach engine today.

Find companies

Discover

Target companies by filters

Signals

News, hiring, and funding data

TAM Calculator

Market size, mapped

Find contacts

Domain Search

Contacts at companies

Email Finder

Verified emails by name

Browser Extensions

Chrome, Edge, Firefox

Manage leads

Email Verifier

Check before you send

Leads

Build and segment lists

Google Sheets

Hunter in your spreadsheet

Send emails

Sequences

Automate, A/B test, and improve

AI Writing Assistant

Personalize emails at scale

Deliverability Checker

Land in the inbox

Run your
first month

Take the first step in your year of outreach with 50 verified leads for free.

Try Hunter today