

Corey Quinn, Inc.

# Gift-Based Outbound Workshop



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# The **Problem** with Outbound



# Where People Struggle With **Outbound**

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1. **Outsourced, \_\_\_\_\_ solutions** never really create an impact.
2. Building \_\_\_\_\_ **teams** take too much time and effort to build successfully.
3. Stuck dealing with \_\_\_\_\_ **leads** who can't afford your services.

# My Promise To You

By following the steps in this training, you have everything you need to create a **predictable pipeline** of **new sales opportunities** from your **best-fit leads**.



# About Me

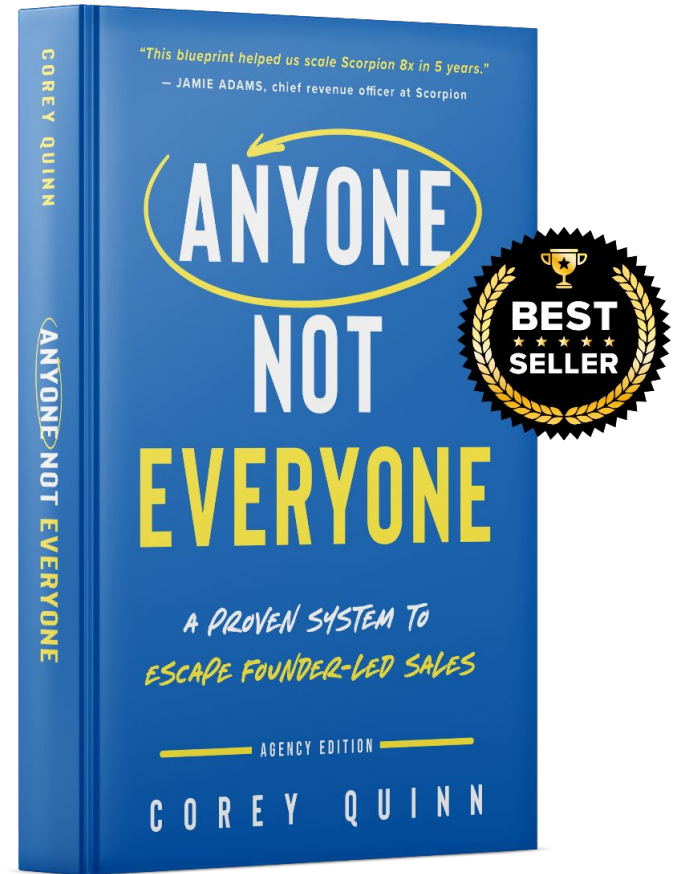
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17 years in the agency world across sales, marketing and leadership roles.

Last in-house role was CMO of Scorpion. Grew revenue from \$20M - \$150M in 6 years.

Author of the best selling book for agencies:

***Anyone, Not Everyone: A Proven System to Escape Founder-Led Sales***



# What We'll Cover

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**Session One:** Creating Your Target List (today!)

**Session Two:** Gift Selection, Sales Follow-up, and Budgeting

(next week)



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# Create Your **Target List**

# Where People Mess Up **List Building**

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1. \_\_\_\_\_ the list.
2. **Spray and \_\_\_\_\_, spam your \_\_\_\_\_** approach.
3. Include \_\_\_\_\_ **leads.**





Farheen Anwer

6:12am

Hi Corey

Introducing B2B Rocket: a sales automation platform with powerful features:

- 5 Automated Agents: Handle initial conversations and set up meetings, freeing your team to focus on closing deals.
- 6,000+ Monthly Leads: Identifies and connects you with ideal prospects, custom-selected for your business.
- 54,000 Monthly Emails: Keep in touch with leads through automated, yet personal, follow-ups.

May I send you the calendar invite link to showcase the value B2B Rocket can add to your operations?

Kind regards,  
Farheen



# Prioritize Quality over Quantity

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**Traditional Outbound  
= Quantity First**

**“Net Fishing”**

Huge list

Qualify later

Outsource list

**VS**

**Gift-Based Outbound  
= Quality First**

**“\_\_\_\_\_ Fishing”**

\_\_\_\_\_ list

\_\_\_\_\_ first

\_\_\_\_\_ list

.....  
Focus Outbound on  
High-Value Leads  
.....

20%

80%

**YOUR FOCUS VERTICAL**

.....  
Focus Outbound on  
High-Value Leads  
.....



20%

**Only** send gifts to your **20% List**.

No \_\_\_\_\_

# Create Your Target List: **What We'll Cover**

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1. Sourcing leads
2. Prioritizing leads
3. Using the Workbook
4. Summary
5. 6-Day Challenge



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# Sourcing Leads

# Two Steps To Build A **20% List**

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Step One:  
**SOURCE LEADS**

Step Two:  
**PRIORITIZE THE LIST**



Step One:  
**SOURCE LEADS**



Step Two:  
**PRIORITIZE THE LIST**

Create the list yourself	Get the list from a trusted partner
Buy the list from a vertical specialty firm	Buy the list from a list broker service





# Step One: SOURCE LEADS



# Step Two: PRIORITIZE THE LIST

## Get the List In Your



Sample Outbound 20% List

1	Test Example	555-555-5555	123 Main St, Suite 32	Milwaukee	WI	55555	Bob
2	Business Name	Website	Firm Phone Number	Street Address	City	State	FA First Name
3	DeWitt LLP	www.dewittllp.com	262-754-2840	13845 Bishops Dr Ste 300	Broadfield	53005 WI	
4	Schiller DuCanto & Fleck LLP	www.sdfllaw.com	847-615-8300	One Conway Park, 100 N Field Dr Ste 160	Lake Forest	60045 IL	
5	Stange Law Firm, PC	www.stangelawfirm.com	855-805-0595	120 S. Central Ave., Suite 450	Clayton	63105 MO	
6	Law Offices of Jonathan Merel, P.C.	www.jmerel.com	312-408-7000	180 N Benson Ave # 1300	Chicago	60601 IL	
7	Karp & Janco, S.C.	https://www.karpjanco.com/	414-485-0191	1433 N. Wacker St., Suite 428	Milwaukee	53202 WI	
8	Women's Divorce & Family Law Group By	www.womensfamilylawyers.com	312-445-8830	77 W Wacker Dr 45th Floor	Chicago	60601 IL	
9	Coronel & Corneil - Divorce Attorney Office	coronelcorneil.com	866-323-7529	100 W Main St 2nd Floor	Bellevue	62220 IL	
10	Divergent Family Law	https://www.divergentfamilylaw.com/	262-627-4411	201 Regency Ct, STE 200	Broadfield	53045 WI	
11	Meyer Capel	www.meyercapel.com	217-352-1800	306 W Church St	Champaign	61820 IL	
12	Mirabella, Kincaid, Frederick & Mirabella, L	https://www.mirbellaw.com/	630-865-7300	1737 S Naperville Rd STE 100	Wheaton	60189 IL	
13	Wool Riley, S.C.	www.woolriley.com	716-839-7788	3824 Oakwood Hills Pkwy	East Chate	54701 WI	
14	Herring Clark Law Firm	https://herringclark.com/	920-739-7386	800 North Lynndale Drive	Appleton	54914-3017 WI	
15	Family Law Solutions.P.C.	firm/familysolutionschicago.com	312-332-1344	121 S. Wilke Rd., Suite 501	Arlington Heights	60005 IL	
16	Mirabella, Kincaid, Frederick & Mirabella, L	https://lame-county.mirbellaw.com/	630-549-0960	250 W River Dr #2a	St. Charles	60174 IL	
17	Merrill Law Firm, Ltd	www.merrilllaw.com	920-731-6631	2001 E. Eisenhower Ave	Appleton	54913 WI	
18	Charlotte Christian Law	www.charlottechristianlaw.com	872-201-3464	1 N La Salle St Ste 2350	Chicago	60602 IL	
19	Butler Giraudo & Weister	www.southbutlerlaw.com	309-455-5552	110 SW Jefferson Ave UNIT 410	Peoria	61602 IL	
20	Steen Prekoshi	www.steenprekoshi.com	847-668-9584	1603 Orrington Ave # 800	Evanston	60201 IL	
21	Weiss-Kunz & Oliver	www.whofofficial.com	312-605-4041	77 W Wacker Dr Ste 4500	Chicago	60601 IL	
22	The Stogdill Law Firm, P.C.	https://www.stogdilllaw.com/	630-462-9500	1776 S Naperville Rd Ste 202	Wheaton	60189 IL	
23	Anderson & Bidack	https://andbidack.com/	312-410-8891	20 N Clark St Suite 3100	Chicago	60602 IL	
24	STG Divorce Law	https://www.stgdivorce.com/	630-865-7676	600 E Clark Rd Suite 115	Naperville	60563 IL	
25	Nowlan Law LLP	https://nowlan.com/	608-785-8100	100 S Main St	Janesville	53545 WI	
26	Law Firm of Conway, Olejczak & Jerry, S	https://www.lcjlaw.com/	920-437-0476	231 South Adams Street	Green Bay	54301 WI	

Sample CRM Lead List

Name	Access Email	Account Manager	Company	Phone #	Lead #	Current Location	Industry	Size
Jessica Medina	Access Email	Account Manager	Agentic AI	Request Mobile Number	off	Carroll, Mexico	100	computer software
Juan Calabon	Access Email	Account Manager	Agentic AI	Request Mobile Number	off	Bogotá, Colombia	100	computer software
Wahne Tughin	Access Email	Manager, Talent Acquisiti	Agentic AI	Request Mobile Number	off	Bengaluru, India	100	computer software
Ara Altazarian	Access Email	Director of Product Marketing	Agentic AI	Request Mobile Number	off	New York, New York	100	computer software
Craig Stephenson	Access Email	VP, People	Agentic AI	Request Mobile Number	off	New York, New York	100	computer software
Bernard Lohar	Access Email	SOM Manager	Agentic AI	Request Mobile Number	off	San Francisco, California	100	computer software
Ladislav Ludevic	Access Email	Marketing Operations Manager	Agentic AI	Request Mobile Number	off	Hatfield Regional Municipality, Ca.	100	computer software
Wahne Tughin	Access Email	Senior Technical Product Manager	Agentic AI	Request Mobile Number	off	San Francisco, California	100	computer software
Jonathan Oliver	Access Email	Customer Onboarding Manager	Agentic AI	Request Mobile Number	off	Portland, Maine	100	computer software

## Build Your List From Multiple Sources





## Pro-tips For Getting Started:

- Focus on \_\_\_\_\_
- Consider initially focusing on a specific \_\_\_\_\_ . Pacific Northwest, for example.
- Aim for between \_\_\_\_\_ and \_\_\_\_\_ businesses on your initial list.
- Don't worry about \_\_\_\_\_ the list. Start with \_\_\_\_\_ businesses. We'll qualify later.



## Quick Exercise:

- Where do you \_\_\_\_\_ today?
- Which \_\_\_\_\_ have the lead list you need?
- Does your vertical have local, regional or national \_\_\_\_\_ that you can contact to get the list?

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# Prioritize the **List**



Step One:  
**SOURCE LEADS**



Step Two:  
**PRIORITIZE THE LIST**

**Isolate those businesses on your lead list that are the most likely to:**

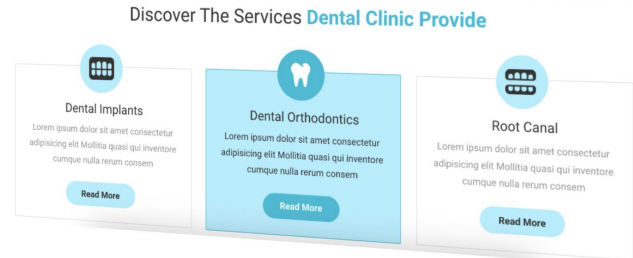
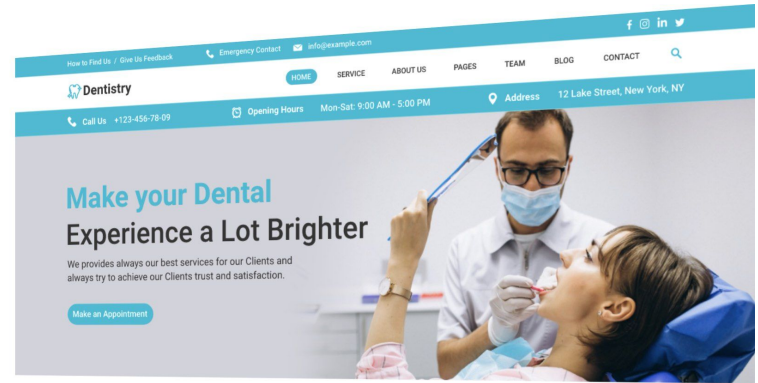
1. Be experiencing \_\_\_\_\_ from the problem your business solves
2. Be able to \_\_\_\_\_ your services

# Example: Websites for Dentists

Do they have **acute pain?**

Look up the last time they had a website redesign (on [Wayback Machine](#)).

Dentists whose websites are \_\_\_\_\_ **years old** or more are probably worth prioritizing over other leads who just updated their website \_\_\_\_\_ **months ago**.



Websites usually last for 2-3 years

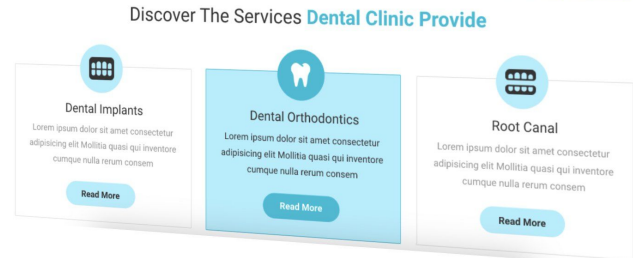
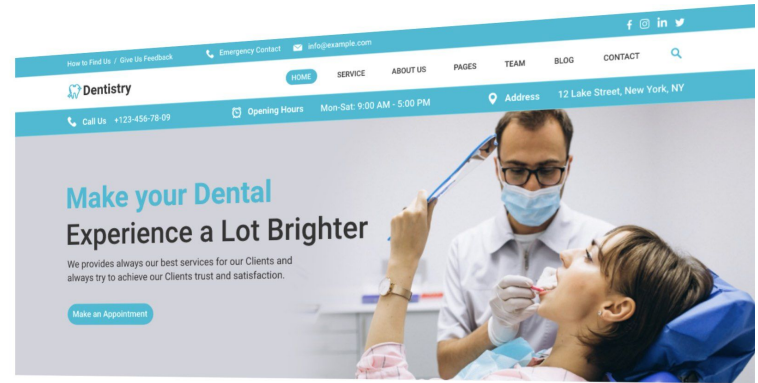


# Example: Websites for Dentists

Can they **afford your services?**

De-prioritize those dentists who have only \_\_\_\_\_ dentist or staff member.

Instead, prioritize practices with multiple \_\_\_\_\_ or more than one \_\_\_\_\_ .



Websites usually last for 2-3 years



# Prioritization Criteria

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Must be **measurable** and must help **determine fit**.

Avoid **opinions** or **feeling based** criteria.

Use number of \_\_\_\_\_, not the whether you like the design of their logo.

## Examples of criteria:

- Location
- Number of locations
- # of employees
- Organic search traffic
- Doing paid search
- Page speed
- Facebook followers
- Domain age
- Website age
- Franchise owned



## **Exercise:**

**What might you include in your  
criteria to develop your 20%  
List?**

**3 minutes**



## Pro-tip For Finalizing Your 20% List:

After you have your 20% List...you will want to **manually review the list before sending gifts.**

### Ask:

- Would they be perfect-fit clients?
- If we got them on the phone, would we have higher-than-average chances of closing them?

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# Using the **Workbook**



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# Summary

# A Quick Review

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## 20% List

- Source your \_\_\_\_\_
- Select criteria to \_\_\_\_\_ your list
- \_\_\_\_\_ your lead list
- Identify your \_\_\_\_\_ leads
- Manually \_\_\_\_\_ 20% leads

Your **20% List** is the foundation of your GBO campaign success.



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# 6-Day Challenge

# 6-Day Challenge

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## Create Your 20% List in the Next 6 Days

- Source your list
- Select criteria to prioritize your list
- Score your lead list
- Identify your 20% leads
- Manually review 20% leads

*“There is no greater harm than that of time wasted.” - Michelangelo*



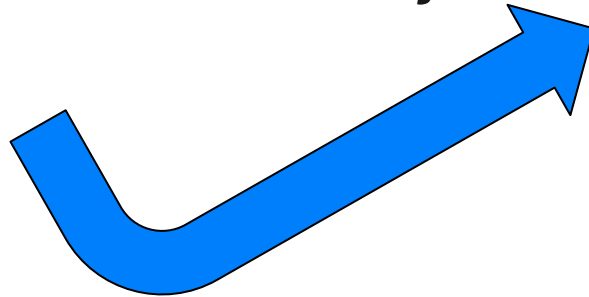
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# Survey + Workbook



# Gift-based Outbound: Session 1, List Building Feedback Survey

Please take this 2-minute survey.



<https://geni.us/gbo-survey-1>

# Resources to Build Your 20% List

## Gift-Based Outbound Workbook

- Sourcing Leads
- 20% List
- GBO Gift Ideas Worksheet
- GBO Campaign Tracker
- GBO Campaign Checklist



<https://geni.us/gbo-workbook>

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Thank You 🙌 🙏 🙌

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# Gift-Based Outbound Workshop



# A Quick Review

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## 20% List

- Source your \_\_\_\_\_
- Select criteria to \_\_\_\_\_ your list
- \_\_\_\_\_ your lead list
- Identify your \_\_\_\_\_ leads
- Manually \_\_\_\_\_ 20% leads

Your **20% List** is the foundation of your GBO campaign success.



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# Planning Your Campaign

# Where People Mess This Up

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Send a gift \_\_\_\_\_.

They approach gifting as a \_\_\_\_\_.

They send items with **their** \_\_\_\_\_ **on it, during**  
**the** \_\_\_\_\_.



# How Gift-Based Outbound is Different

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## Traditional Gifting

Single event

Bribe for their time

Logo-ware

Send at expected times

**vs**

## Gift-Based Outbound

\_\_\_\_\_, for 3 years

\_\_\_\_\_ building

\_\_\_\_\_, striking gifts

Send at \_\_\_\_\_ times

# Planning Your Campaign

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## What We'll Cover

- Planning Duration & Frequency
- Giving a Good Gift
- Creating a Budget



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# Planning Duration & Frequency

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# Duration



**The length of the GBO campaign is based on the product life cycle of a typical client.**

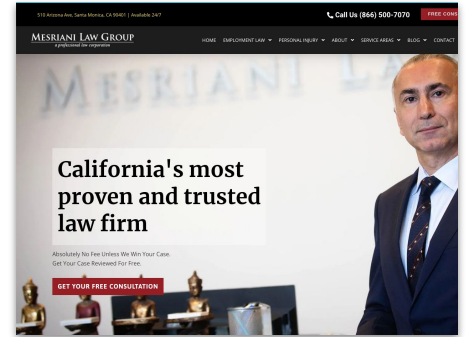
# Examples of Product Life Cycle



years



years



years

**Question:**

**How long does a typical client  
stay with **your agency**?**

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# Frequency





When have you received a  
**one-off gift** from a vendor  
soliciting your business?

What impression did that leave?

**Send a gift to your**

**20% List every \_\_\_\_\_.**

**Continue sending quarterly gifts  
until they \_\_\_\_\_ with you.**

**GBO is not a \_\_\_\_\_ event**

**That's like going to the gym once and expecting results**

## Rule of 7

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Your consistency communicates that you  
**genuinely want connect with them.**

**Every gift they receive compounds goodwill and reciprocity.**

**It's like \_\_\_\_\_ in the bank.**

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# Giving a Good Gift

# What Makes a Great Gift?

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When in your life have you received a great gift?  
(Not an experience, but a tangible gift.)

Then, once you have it, jot down a few words about  
what made it great.



The reason why I asked this is it's important to become familiar with **what makes a gift** \_\_\_\_\_

You'll be a \_\_\_\_\_ **gift giver** for your campaigns.

# A gift that warms up your target lead needs to meet **three criteria**:

\_\_\_\_\_

It must be \_\_\_\_\_

It must be \_\_\_\_\_

It must leave an \_\_\_\_\_

"It's the thoughtful thought that counts."

—John Ruhlin, author of GIFT•OLOGY

# Evoking the Power of Reciprocity

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“When you give somebody a gift that makes them feel VIP and special, there’s something that goes on in our brain psychologically that wants to reciprocate back to that person — that wants to love that person back,” “It’s just how we’re wired.”



**John Ruhlin**  
author of GIFT•OLOGY

# Example: Covid Recovery Kit

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- ✓ **Video training** on marketing during a lockdown
- ✓ **Best-selling book** on leading through change written by an author in home services
- ✓ **N95 masks**
- ✓ **Protective gloves**



# “USI” Gifts I’ve Sent

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- Gourmet cookies to attorneys
- Delectable doughnuts and dark roast coffee to plumbers
- Custom flower arrangements to dentists
- Premium alcohol to attorneys
- Personalized iPads to franchise brand CMOs
- Leadership books to multiple verticals
- Eye-opening video brochures to multiple verticals

But, I recommend you [discover what works best for you and your vertical.](#)

# Tried and True Playbook

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First, send \_\_\_\_\_.

Then, send a \_\_\_\_\_.

## Things to avoid

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- Sending gifts on \_\_\_\_\_ and  
**birthdays**
- \_\_\_\_\_ logo-swag

## 2-Minute Brainstorm:

What are some **initial ideas**?





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# Creating a Budget

# The #1 Factor in Determining Budget Is LTV

—

\_\_\_\_\_ of a Client

=

The average amount of total revenue you collect per client over the lifetime of that client.

For example:

**If a typical client pays \$1,000 per month and stays for 12 months on average, the LTV is \_\_\_\_\_.**

(\$1,000 x 12 months)

What if you **doubled** or even **tripled** your retention?

Client Retention	Lifetime Revenue
12 months	<b>\$12,000</b>
24 months	<b>\$24,000</b>
36 months	<b>\$36,000</b>

**Write Down:**

**What is your client **LTV**?**

## Gift-based Outbound Target **Metrics**

100 gifts sent

3 meetings

1 client

# Gift-based Outbound Target Metrics

**\$72,000 LTV** (\$3k/mo x 24 months)

**100 gifts sent: \$10,000** (\$100.00 x 100)

**3 meetings: \$3,333 per meeting**

**1 client: \$10,000**

**ROI: 7:1**

**Months to Payback: 3** (\$0 if you have a \$10k set up fee)





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# After the Gift Arrives

# How Gift-Based Outbound is Different

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## Traditional Gifting

No follow-up

Follow-up in days/weeks

Single touchpoint

**vs**

## Gift-Based Outbound

\_\_\_\_\_ follow-up

Follow-up \_\_\_\_\_

\_\_\_\_\_ touchpoints

# What We'll Cover

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- Following Up
- Using the Workbook

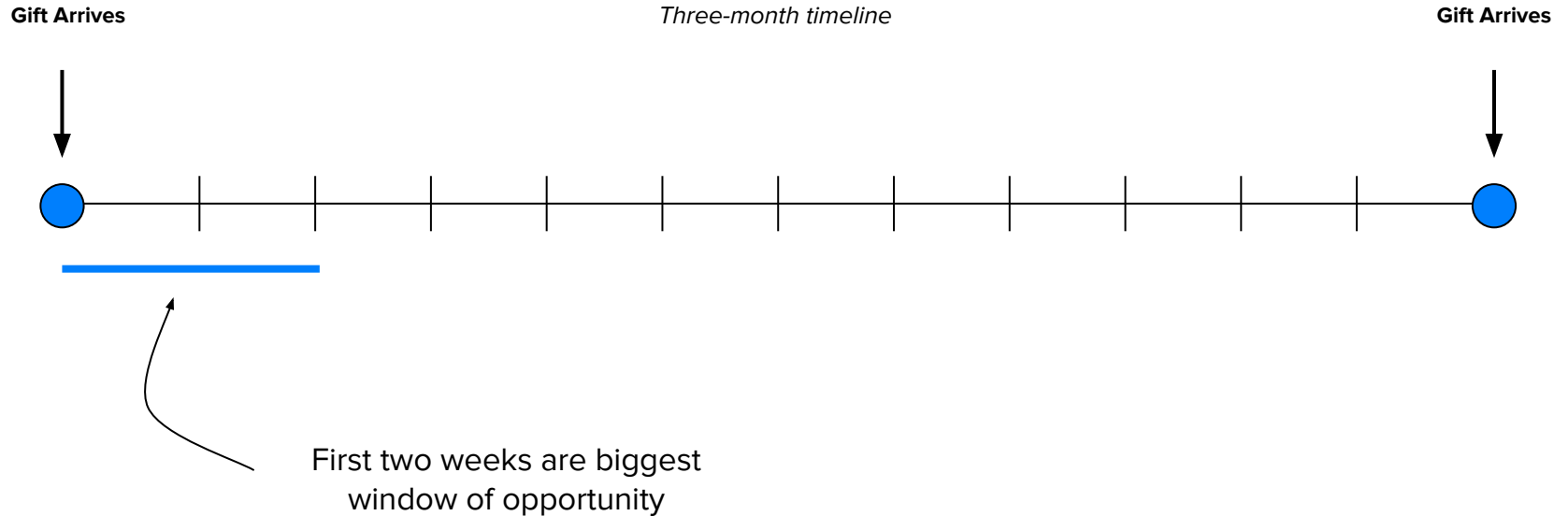


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# Following Up

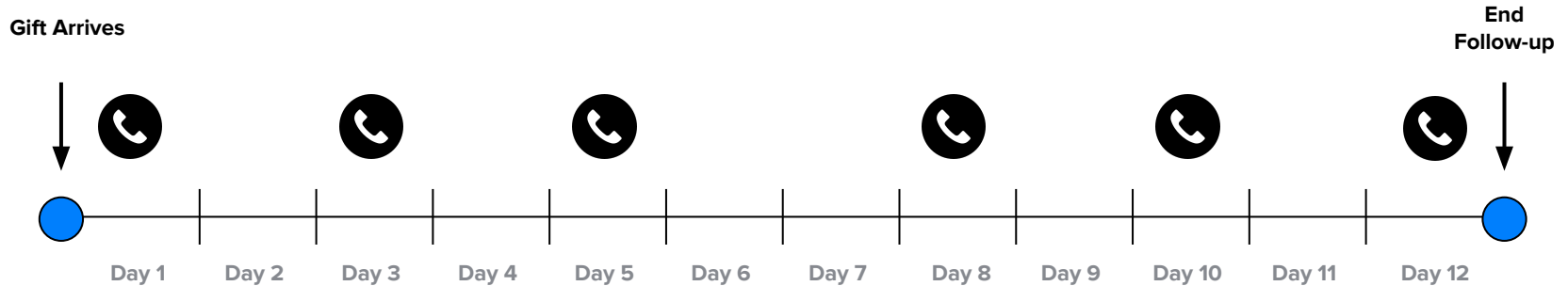
**Capture the moment**  
**your gift created**

# Capture the moment your gift created



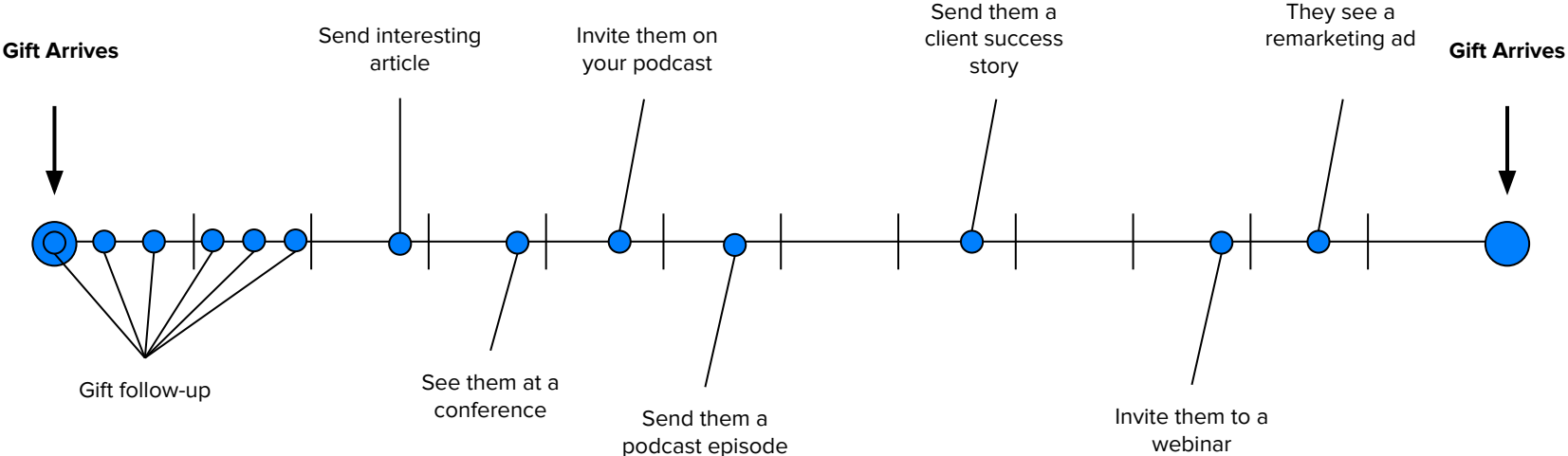
# Follow-up Cadence

## 6 follow-up attempts in the first two weeks



If you don't reach the person on the call, leave a voicemail and send an email

# Gift-Based Outbound is part of a larger mix of touchpoints





# Ways you can engage with your 20% List in-between gifts:

- Send them a helpful company blog post.
- Share a useful article relevant to their industry or profession.
- Respond to their social post, then follow up with more resources.
- Answer one of their questions on an online forum, then follow up with more resources.
- Buy them dinner at an upcoming conference.
- Reference a relevant blog post they just published.
- Recommend an event in their area.
- Invite them to be a guest on your podcast
- Invite them to an upcoming webinar or educational event you are hosting.
- Send them a link to relevant press coverage of your awards.
- Call attention to something their competitor is doing well and ask how they plan to address it.
- Send them links to recent sites you've launched that may interest them.
- Send LinkedIn InMail / Request



# Resource

## GBO Campaign Tracker

Use this to track you campaigns

The screenshot shows a Google Sheets spreadsheet with the following content:

- Title:** Gift-Based Outbound Resource
- Menu:** File, Edit, View, Insert, Format, Data, Tools, Extensions, Help
- Toolbar:** Search (Menus), Undo, Redo, Print, Refresh, 100%, Currency (\$), Percentage (%), Decimal (.0), Thousand (.00), 123, Default font, Bold (B), Italic (I)
- Grid:** Columns A-E, Rows 1-31
- Content:**
  - Row 2: **GBO CAMPAIGN TRACKER**
  - Row 3: If you'd like support, e
  - Row 4: **If you need more help**
  - Row 5: [Corey's Daily Newslet](#)
  - Row 6: [Corey's Free Resource](#)
  - Row 7: [Corey's Paid Resource](#)
  - Row 9: **Prospect's Name**, **Prospect's Company**, **Gift Sent**, **Date Arrived**
  - Row 10: Carter Quinn (sample data), Quinn and Co., LLC, Gourmet cookies, 1/4/24
  - Rows 11-31: Empty grid for data entry.

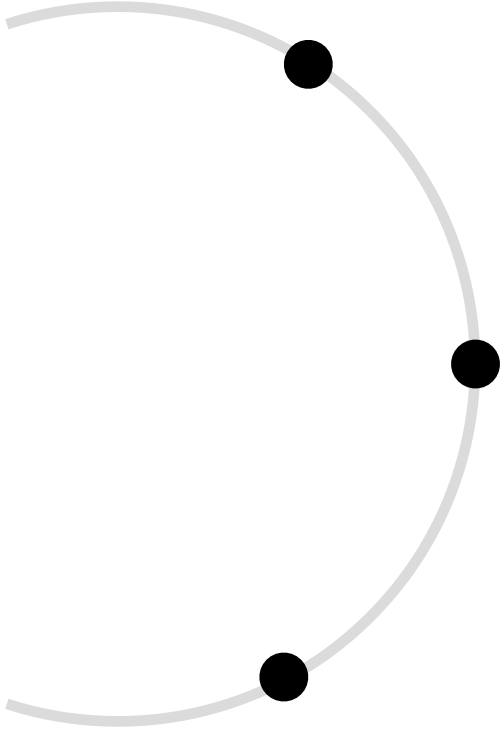


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# Framing the Following Up

# Having a Great Script Isn't Enough

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# Remember...

\_\_\_\_\_

These are \_\_\_\_\_ business owners on your  
\_\_\_\_\_ list.

They get \_\_\_\_\_ all-the-time.

# Frames For Success (not a script)

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1. I see you are a successful business owner in my

\_\_\_\_\_.

2. I also have a successful \_\_\_\_\_.

(even if you've never heard of me)

# Frames For Success

---

3. I'm not here to \_\_\_\_\_ you anything.

4. I'm here to build a \_\_\_\_\_ with you.

# Frames For Success

---

5. This is a gift to \_\_\_\_\_ my genuine interest  
in connecting w/ you.



# Why Does This Work?

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Quid-pro-quo → \_\_\_\_\_

Commission breath → \_\_\_\_\_

Scarcity mindset → \_\_\_\_\_

Which are the traits of \_\_\_\_\_ people.

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# If You Don't Have a Sales Team



# If You Are the Sales Team

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Start with a list of **5-10** on your 20% List

Leverage your **network**

**Personally** do the outreach

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# Using the **Workbook**



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# Summary

# Gift-Based Outbound: Review

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## Create Your Target List

- Spear fishing
- 20% List
- Sourcing
- Prioritizing
- Verifying

## Plan Your Campaigns

- Duration
- Frequency
- Uniquely, Striking  
Impression
- Budgeting

## After the Gift Arrives

- 6-Step Follow-up
- Multiple Touchpoints

**Workbook:** worksheets, trackers & checklists

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# Last Thoughts



# 3 Barriers to Gift-based Outbound Success

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- Not creating a validated 20% list.
- Failing to consistently follow-up (6 attempts in 2 wks)
- Not having a proven sales process that consistently and predictably delivers positive outcomes (30% close rate+).

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# Reflections

# Workshop Reflection

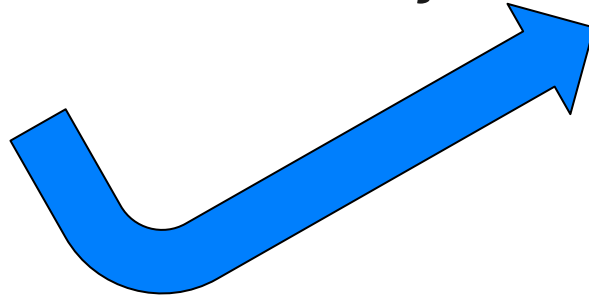
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What idea or insight has been the most valuable?

What do you want to implement immediately / in the short term?

# Gift-based Outbound: Session 2 Feedback

Please take this 2-minute survey.



<https://geni.us/Xa5FEHa>

[www.AnyoneNotEveryone.com](http://www.AnyoneNotEveryone.com)



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Thank You 🙌 🙏 🙌