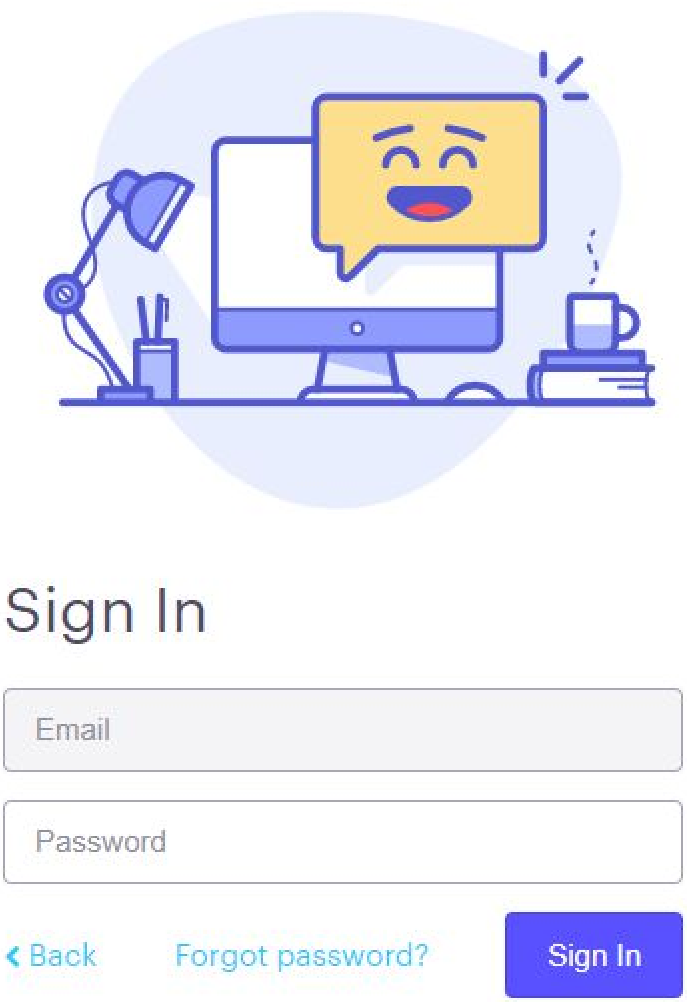
Table of Contents

01. Getting started with Outreach

Here is a step by step walkthrough on how to login to Outreach and download the Chrome extension

- To login to **Outreach**, click **here** and enter in your **Outreach login credentials**

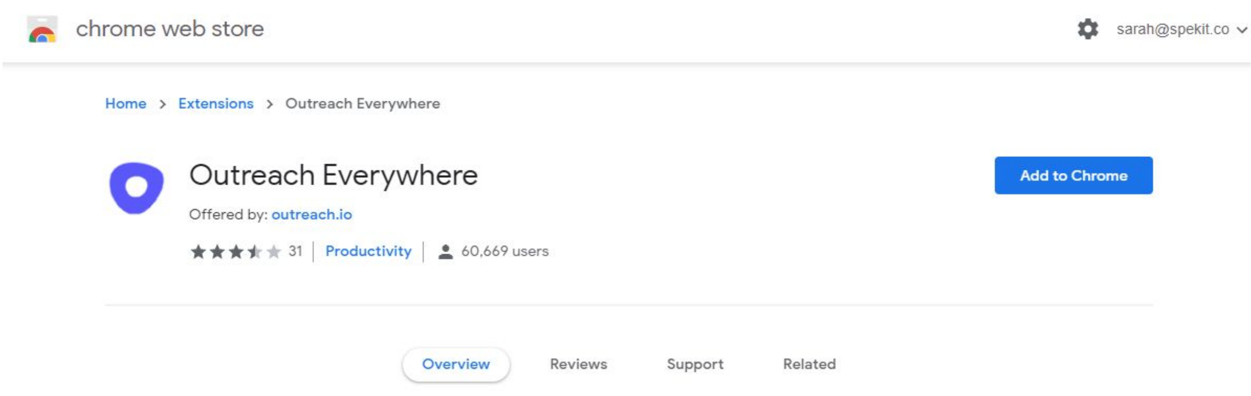
1) Click **Sign in**



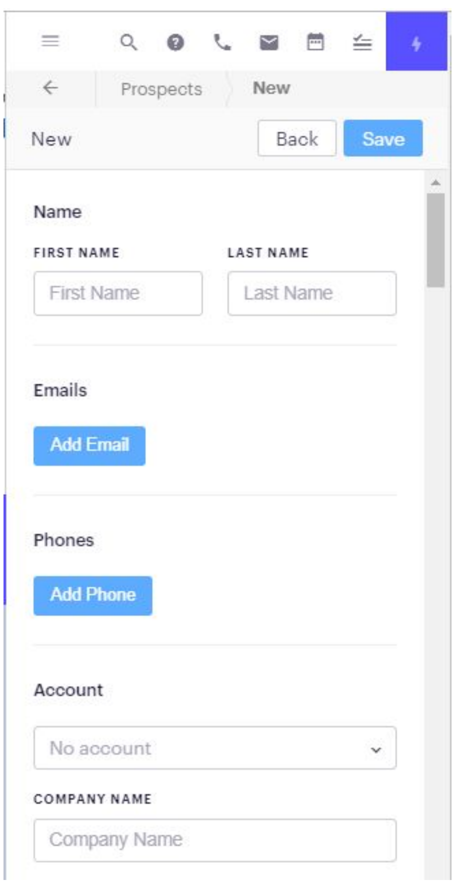
- To download the **Outreach Chrome extension**

2) Click **here**

3) Click **Add to Chrome**



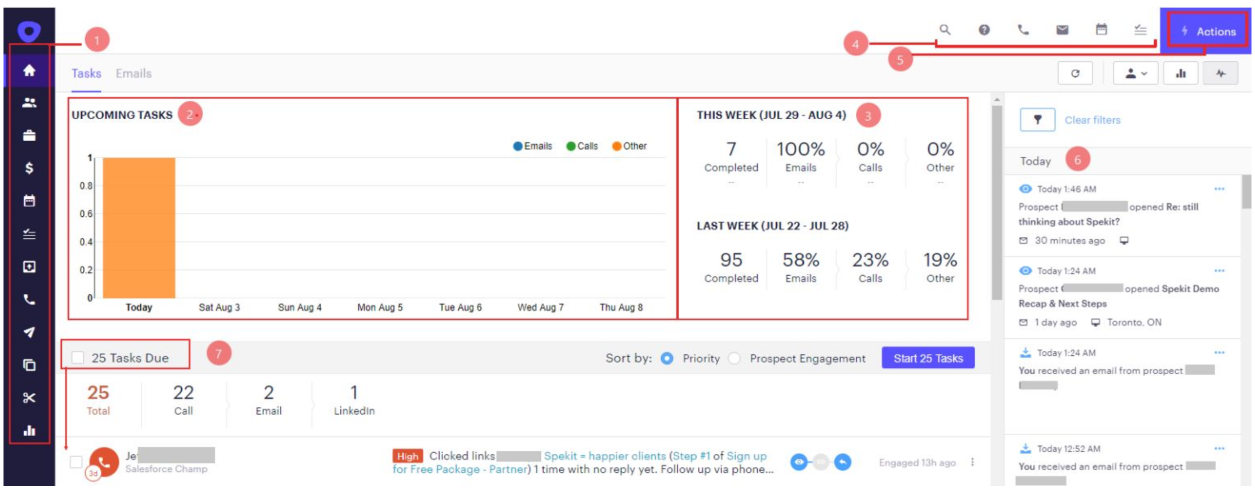
Here's what the **Outreach Chrome extension** will look like once it's installed



02. Navigating Outreach

This will guide you through the different areas and features available in Outreach

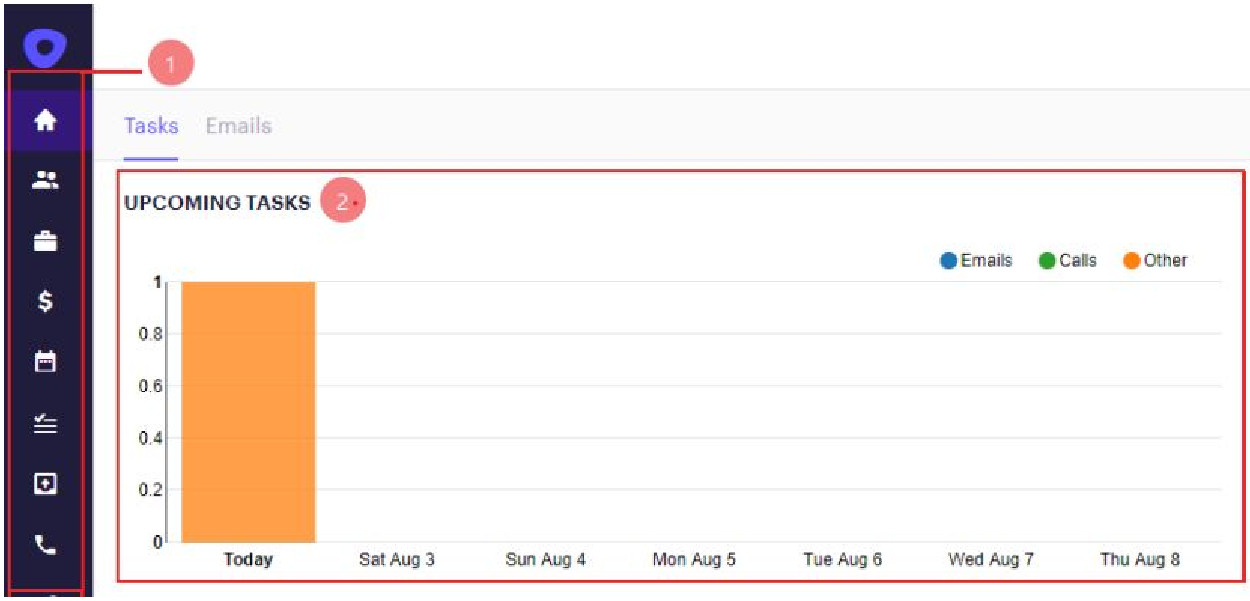
- Once you sign in to **Outreach**, you will land on the **360 View (home tab)**
- There are several features and areas available to you as shown below



These include:

1. Navigation tabs

2. Upcoming task: Number of tasks you have upcoming for the day/ week in graph format

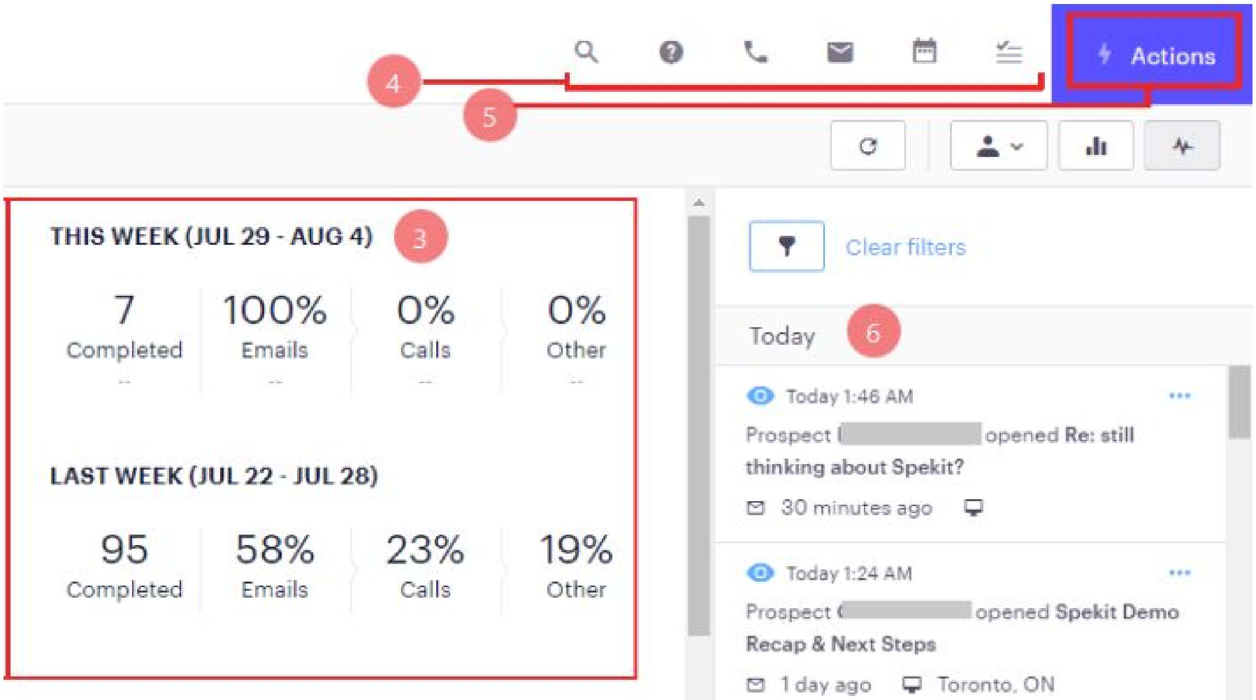


3. Analytics: analytics on all completed for the week

4. Top bar menu: it includes quick actions such as view all due Task, schedule meeting, create an email, make a call, Outreach support, Search bar

5. Actions: includes, add **Prospect**, **Log a call**, create a **Task**, and more

6. Activities: Shows all **Prospect Engagement Activities**



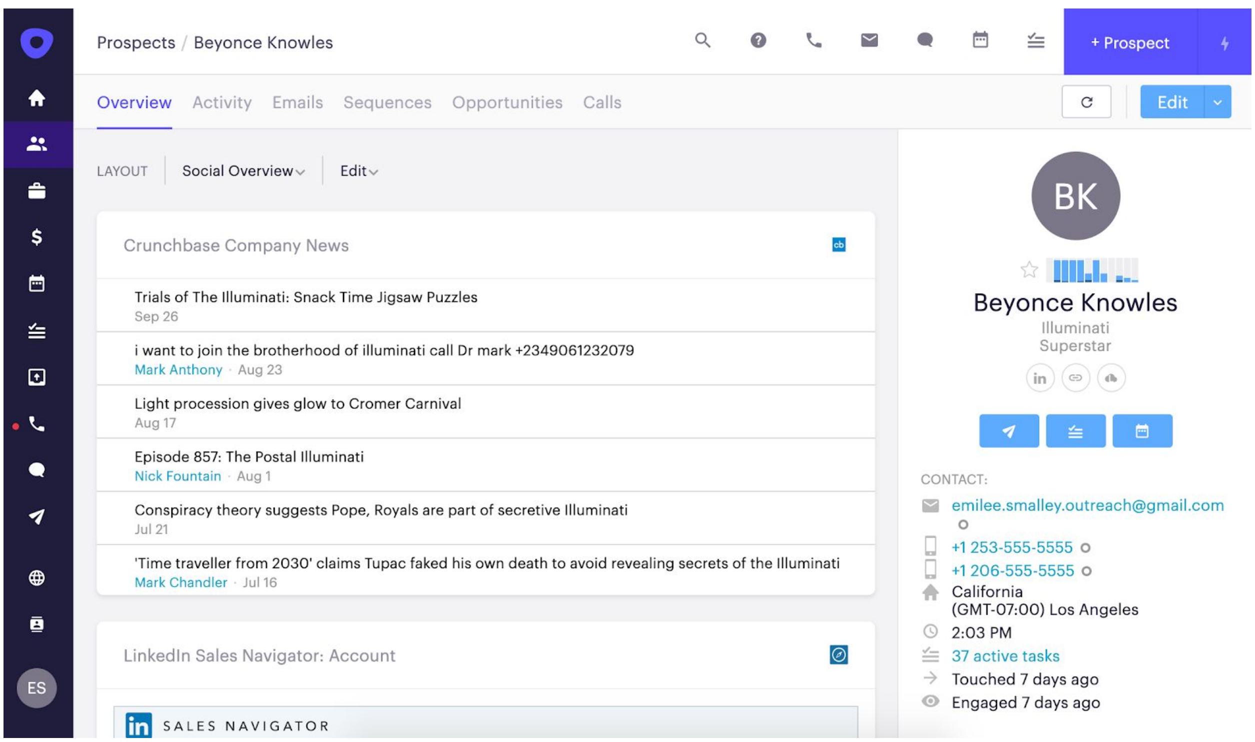
7. All **Tasks Due**

03. Prospects

Unlike Salesforce, which has Leads and Contacts, Outreach only has Prospects, which represent people

- A **Prospect's profile** is where you will find all information associated with them, including an overview, **Activity, Emails**, and **Sequences**
- You can search for **Prospects** using the magnifying glass (**Global Search**) at the top of your screen

- Use the **Global Search** to locate a **Prospect** by their **name, email,** or **company**

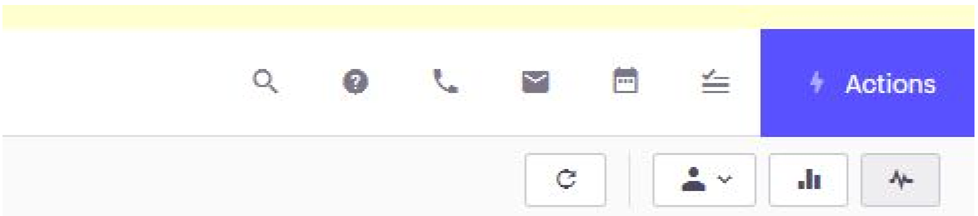


Click here to learn **how to add a new Prospect in Outreach**

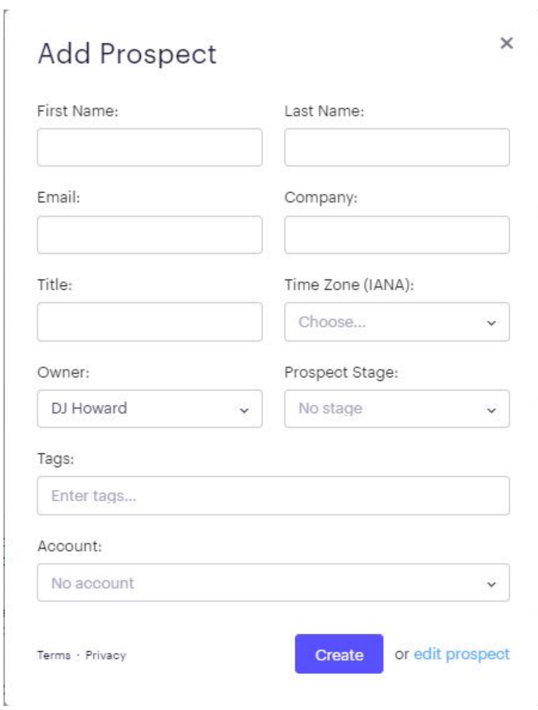
04. Adding a new Prospect

This Spek shows how to add a new Prospect in Outreach

1) Click on the **Actions** tab in the top right corner and select **Prospect**



2) Click the blue **Create** button when you have filled in the necessary information



05. Creating a Sequence

Sequences are a series of touchpoints built to drive deeper engagement with a **Prospect**

Sequences are your guide to ensure the right sales activities are conducted and communications sent to build your sales pipeline and close deals

1) To build your own sequence, **click the book icon** on the left-hand navigation page and select **Sequences**

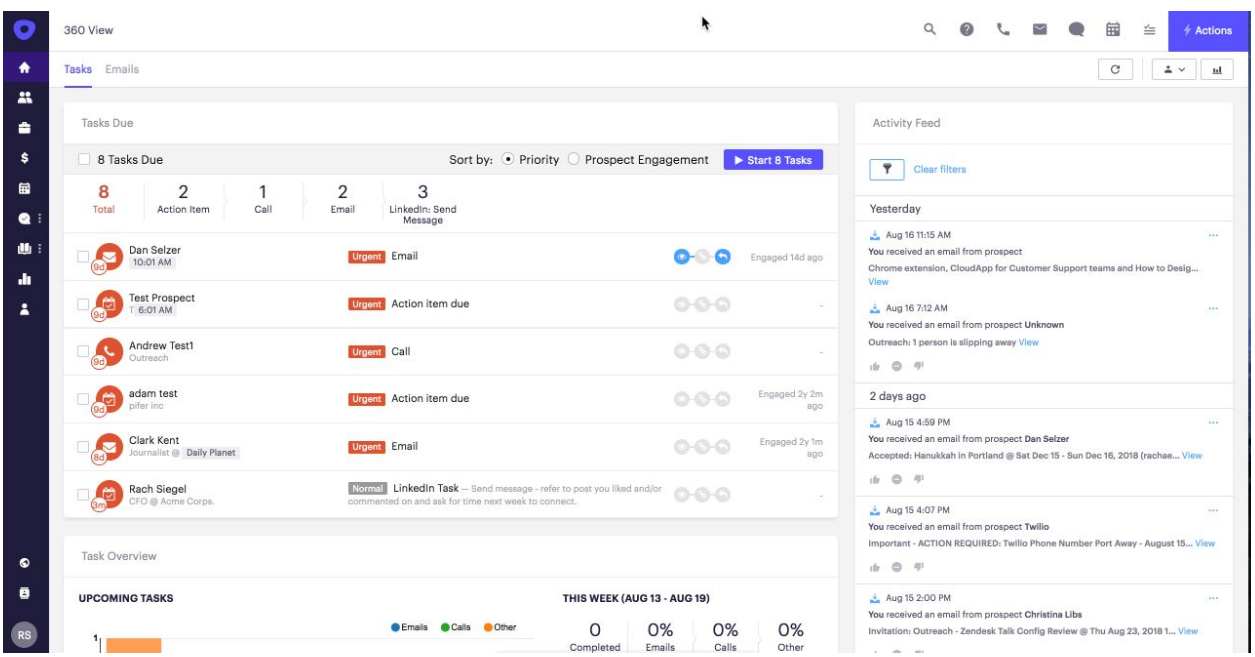
- If your navigation bar is expanded

2) Click on the paper airplane icon.

3) Select **+Sequence** in the upper right-hand corner

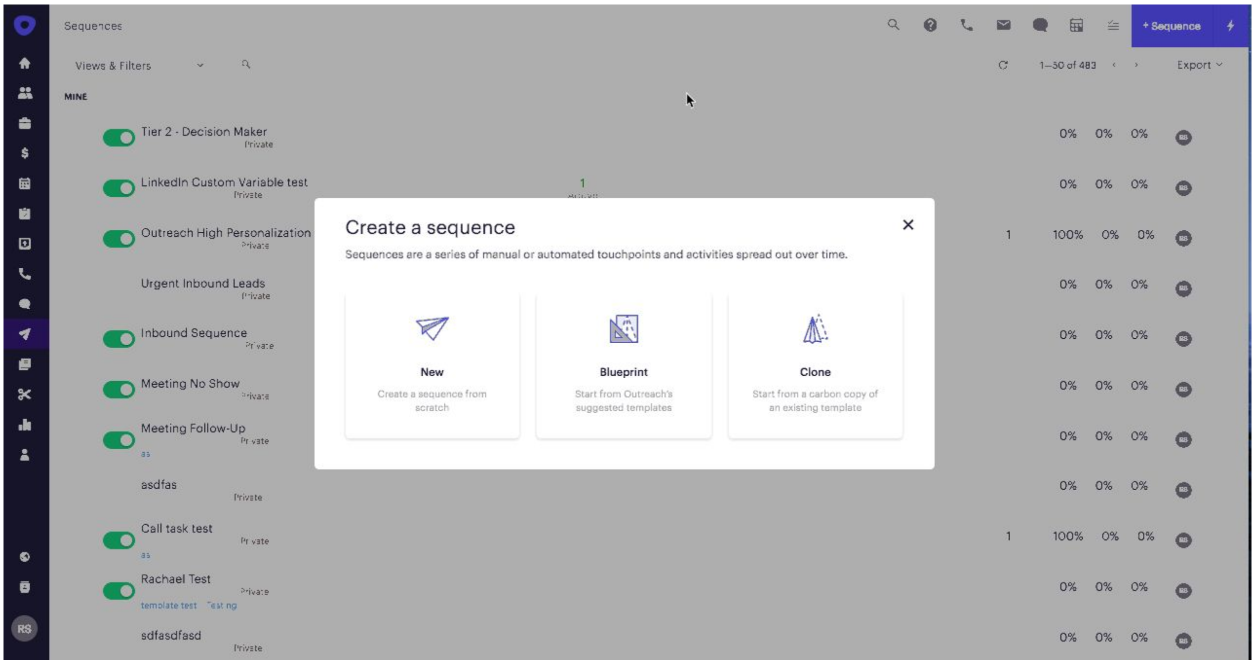
- Here you can decide whether you want to create a blueprint, clone an existing sequence, or create a new **Sequence**

- For this example, we will create a new sequence from scratch.



- **Give your sequence a name** that describes the purpose of the sequence and matches your organization's naming conventions
- Decide if you'd like to add steps by day interval or steps by exact date/time

3) Click the **"Create"** button

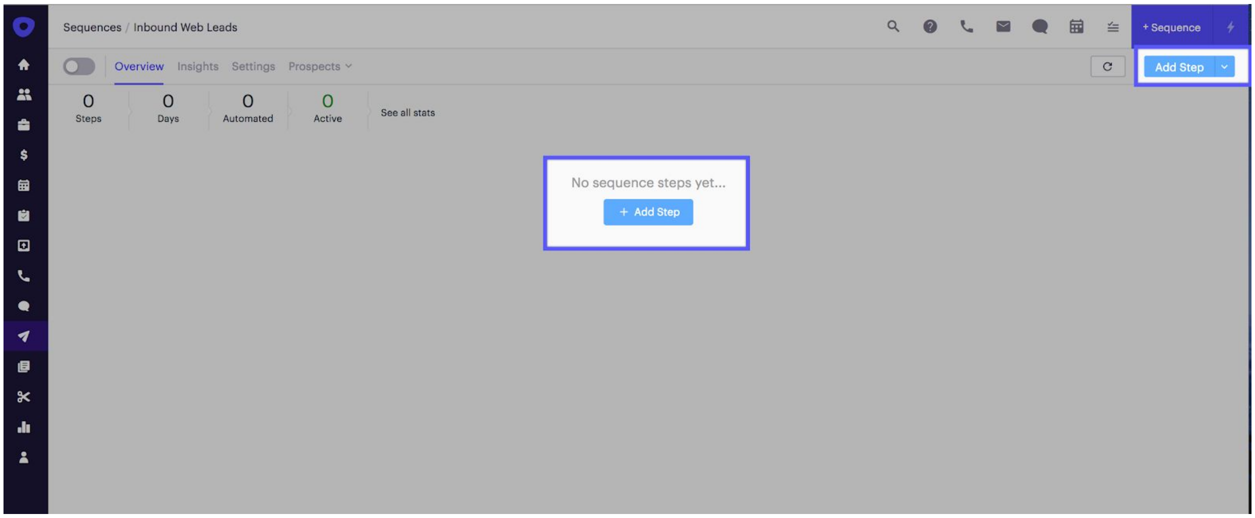


4) From this overview page you can construct your **Sequence** with individual steps to match your sales process

Keep in mind that for most sales teams, it takes an average of 8 touch points to receive a response from a **Prospect**, so we recommend a minimum of 5 steps to accomplish this

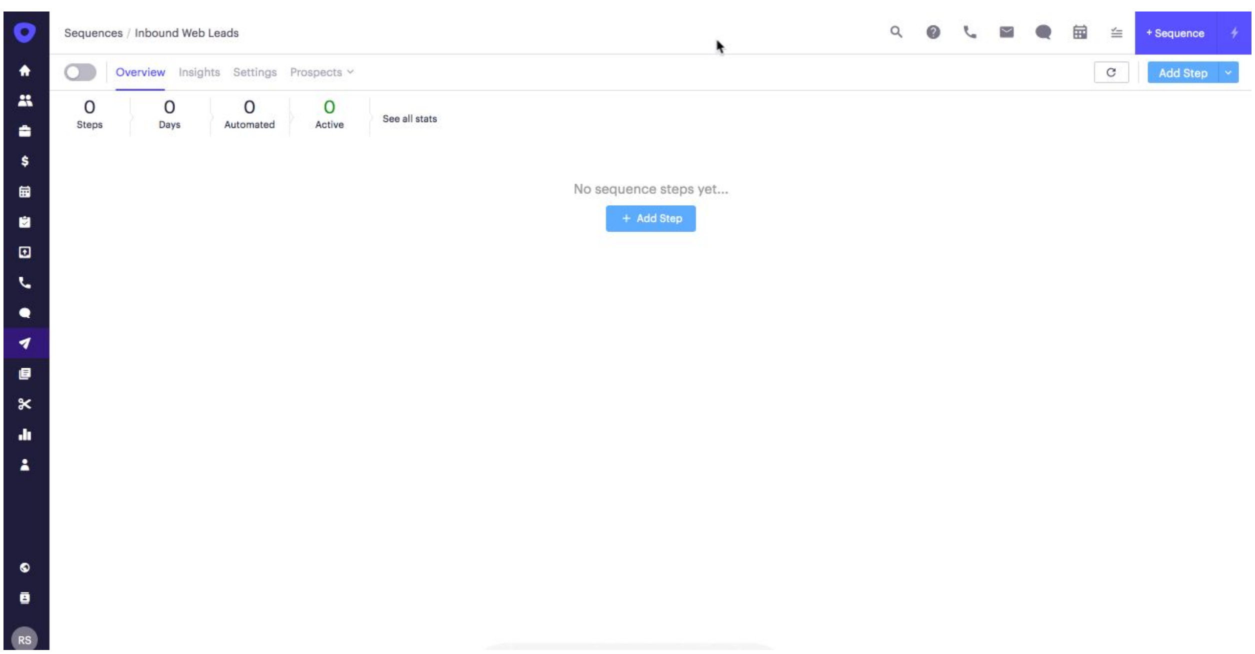
5) Add a step by clicking the blue “**Add**” button in the center of the page or in the top right-hand corner

- You have a few different step types you can choose from **Automatic emails, Manual emails, Call Tasks, Action items, and LinkedIn Tasks**



6) When you select an email step, you'll either write a new email or use existing snippets or email templates

- If you insert a template, you'll be prompted to clone or link your template
- Choose clone if you'd like to make a duplicate copy that you can edit as you'd like
- Choose link if you'd like to always use the specific email template moving forward and reflect any changes you make to that template in the future



7) Continue this process until you have all the steps you want for the **Sequence**

- Once finished, activate the **Sequence** by enabling the master switch on the top left-hand corner of the page