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SALES PLAYBOOK

# Sales Intelligence Tools Playbook

Pick, test, and run the right outbound workflow.

# What You'll Learn

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Six checkpoints from buyer task to measured rollout.

**01**

## Workflow first

Pick the sales task before the vendor demo.

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**03**

## Output scoring

Judge tools by usable contacts, replies, and meetings.

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**05**

## Cost checks

Compare credit math before buying annual seats.

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**02**

## Tool categories

Separate database, enrichment, intent, sending, inbox.

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**04**

## AI workflows

Build repeatable projects for calls, accounts, emails.

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**06**

## Pilot plan

Test one workflow for 30 days before rollout.

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SECTION 01

# Start With Workflow

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The wrong first question is, “Which tool should we buy?”

01

# Define The Job

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Start with the workflow problem, not the tool name.



*What's the specific problem you're trying to solve? What does success actually look like?*

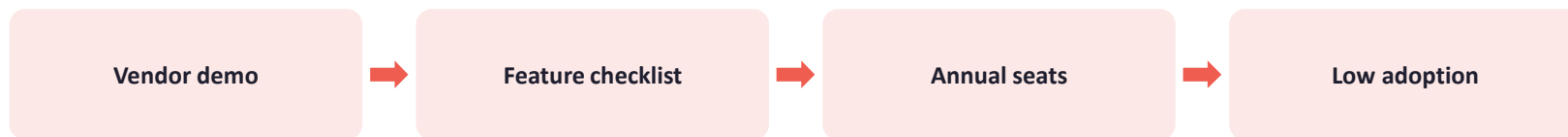
- **Source note:** SME transcript, AI tool selection workflow.
- **Use case:** Apply this before comparing Apollo, Clay, Lusha, UpLead, or Sparkle.io.
- **Decision rule:** No tool demo until one workflow has one measurable outcome.

# Tool-First Buying Fails

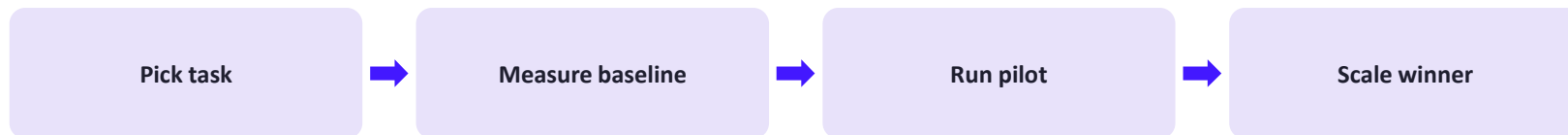
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Feature lists hide the real workflow cost.

✗ TOOL-FIRST PATH



✓ WORKFLOW-FIRST PATH



- **Wrong path:** Demo → feature list → seats → unused workflows.
- **Right path:** Task → baseline → pilot → measured output.

# Workflow Before Vendor

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Use 3 questions before 1 demo.

1

## STRATEGY

### What sales task will change?

Account research, email verification, sequencing, reply handling.

2

## EXECUTION

### Who owns the task?

SDR, AE, founder, or sales ops.

3

## MEASUREMENT

### What number proves progress?

Bounce rate, reply rate, meetings, hours saved.

# Pick One Workflow

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Start with one task, not a tool stack.

**Name the task:** Choose 1 workflow, e.g. “verify 1,000 prospects” or “send 500 cold emails.”

**Set baseline:** Record current bounce rate, reply rate, meetings, or hours spent.

**Choose owner:** Assign 1 SDR, AE, founder, or sales ops person.

**Define win:** Set 1 target, e.g. 30% less processing time.

**Limit scope:** Run the pilot on 1 segment before team rollout.

SECTION 02

# Know The Category

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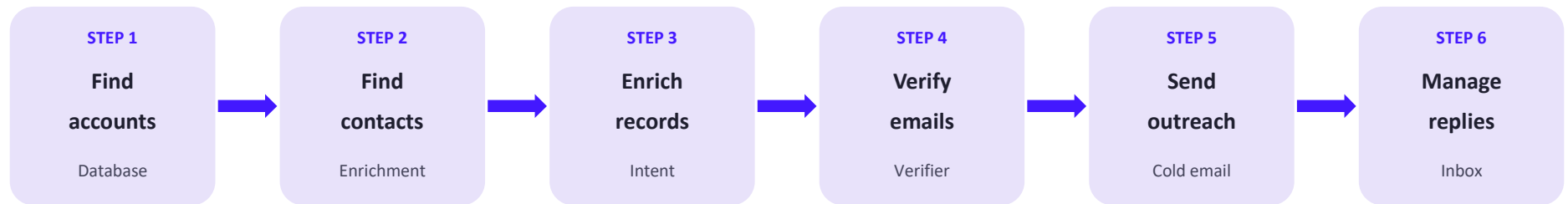
Sales intelligence tools do different jobs under one name.

02

# Tool Categories Matter

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One buyer list can require six separate jobs.



- **Core idea:** Sales intelligence is a chain of data, checks, outreach, and replies — not one feature.

# Tools Solve Different Jobs

Compare by workflow, not category name.

Tool Type	Main Job	Best Fit	Risk To Check
Database	Find contacts	New prospect lists	Outdated records
Enrichment	Add fields	ICP scoring	Credit waste
Intent	Spot signals	Timely outreach	False positives
Cold Email	Send campaigns	Meeting creation	Spam placement
Verifier	Check emails	Bounce control	Catch-all limits
Smart Inbox	Manage replies	Team follow-up	Missed routing

Risk column flags the most common buyer pitfall for each category.

# Data Is Not Enough

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Contact volume does not equal sales output.

- **Usable contacts:** 5,000 exported leads fail if 20% bounce or match the wrong titles.
- **Reachable inboxes:** A verified email matters more than a guessed address in a cold campaign.
- **Safe sending:** SPF, DKIM, and DMARC tell inbox providers that your sender setup is legitimate.
- **Reply handling:** A booked meeting can be lost if 3 replies sit in 3 separate inboxes.
- **Final output:** Score tools by meetings created, not contacts downloaded.

# Score Finished Output

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Count what reaches a buyer, not what exports.

- ICP match:** Test 100 contacts against your title, industry, and company-size rules.
- Email quality:** Verify every imported email before sending 1 campaign.
- Field accuracy:** Spot-check 20 records for title, company, domain, and LinkedIn match.
- Outreach path:** Confirm the tool can move from list to sent email without manual cleanup.
- Reply tracking:** Confirm every reply lands in 1 team-owned inbox or workflow.

SECTION 03

# Build The Workflow

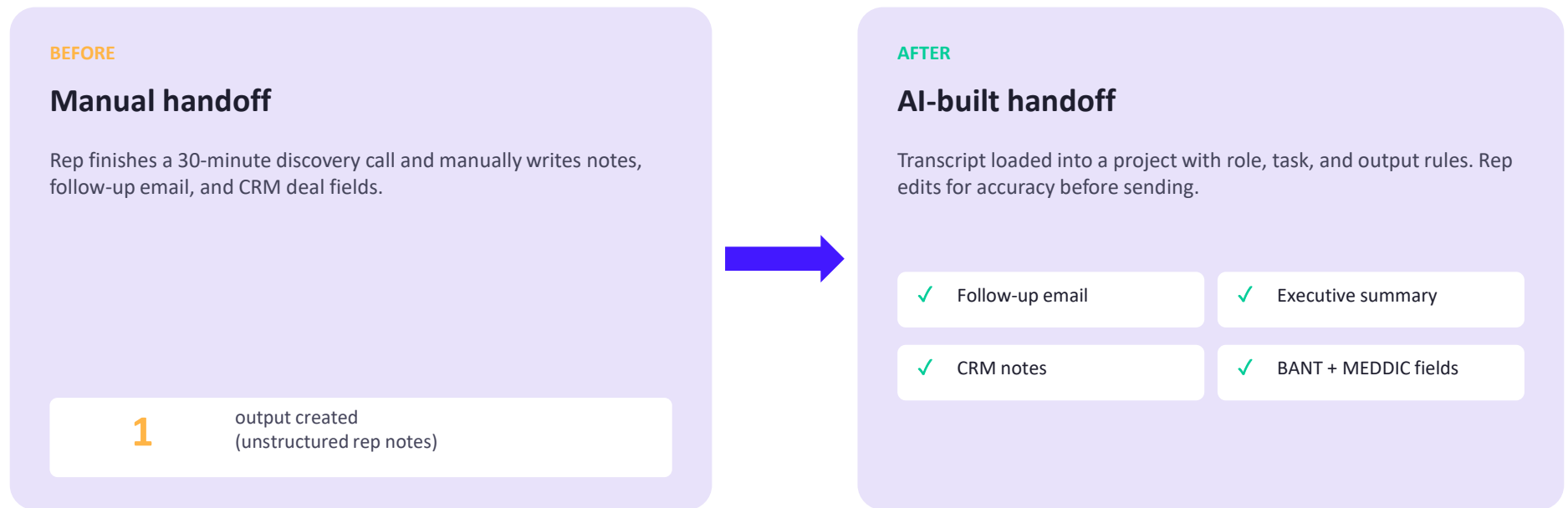
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Repeatable sales tasks need repeatable AI instructions.

03

# Calls Become Assets

A 30-minute transcript can create four sales outputs.



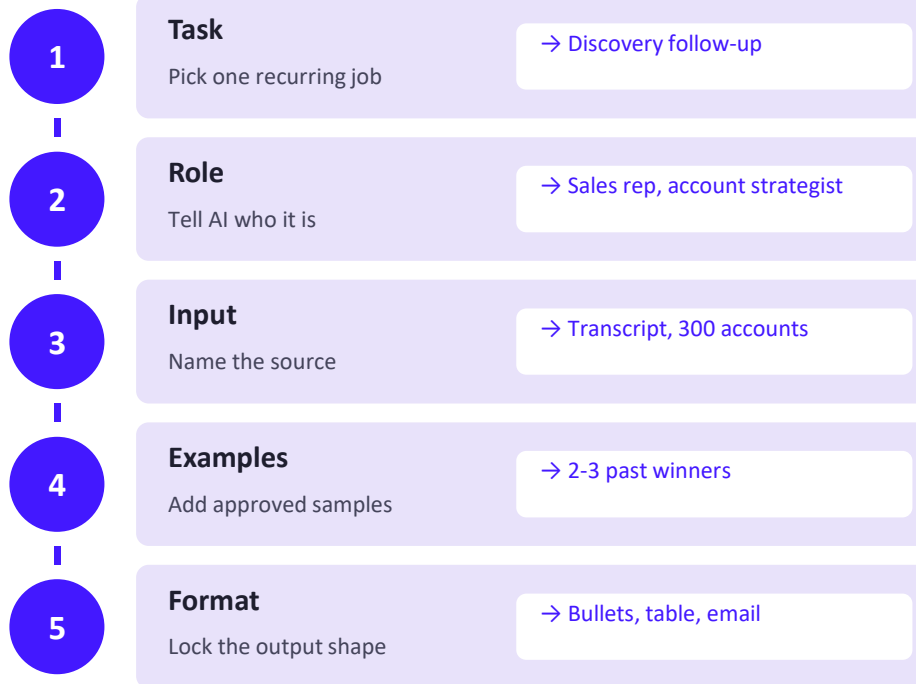
## KEY TAKEAWAY

The tool saves time only when its outputs are ready to use.

# One Task, One Project

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Generic chats create generic sales output.



## WHY IT WORKS

A project bundles role, context, and examples in one place. Each new session inherits them — the rep does not retype rules.

## DESIGN RULE

### One job per project.

If two tasks need different roles, build two projects. Mixed projects produce mixed quality.

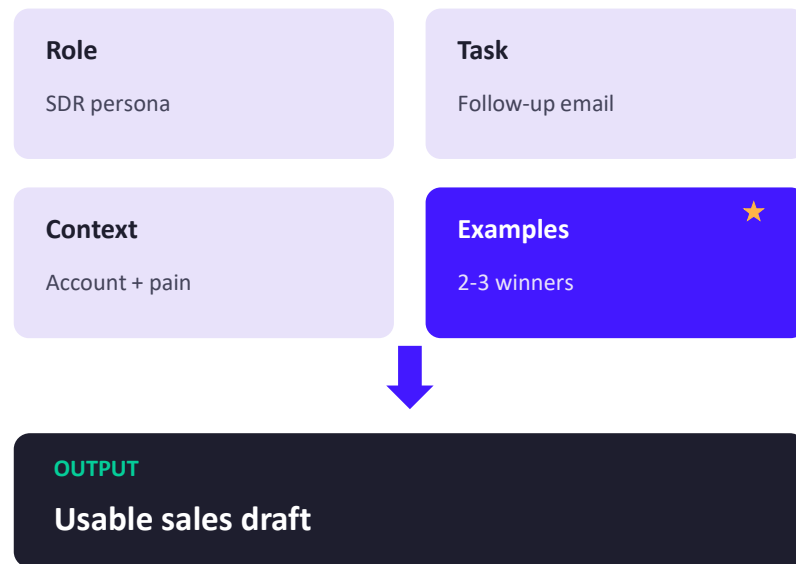
# Prompts Need Examples

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Examples teach style faster than instructions alone.

A prompt with 3 winning emails beats a prompt that only says "write like me."

- **Why:** Examples show tone, length, structure, and CTA style at once.
- **How:** Paste 2-3 outputs that already worked in the inbox.



# Build Your Prompt

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Use this structure for repeatable sales tasks.

- Role:** “Act as an SDR writing to VP Sales at B2B SaaS companies.”
- Task:** “Turn this transcript into 1 follow-up email and 5 CRM-ready notes.”
- Context:** Add account name, pain, product, call date, and next step.
- Examples:** Paste 2 approved emails or 2 approved account notes.
- Output:** Ask for subject line, email body, notes, risks, and next action.

SECTION 04

# Compare The Options

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Price only matters after workflow fit is clear.

04

# Credit Math Changes Cost

A cheap plan can get expensive after usable contacts.

Tool	Pricing Unit	What To Calculate
Apollo	Export credits	Cost per verified contact sent
Clay	Actions + data credits	Cost per enriched account
Lusha	Email + phone credits	Cost per reachable buyer
UpLead	Credits + intent	Cost per qualified account
Sparkle.io	Daily Sparkles	Cost per verified email and sent campaign

## USABLE COST FORMULA

**list cost + enrichment + verification + sending = usable cost**

# Use This Scorecard

Seven checks beat one vendor demo.

CHECK	QUESTION	PASS	RISK	FAIL
ICP match	Does it find your exact accounts and titles?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data confidence	Does it show verification status or sources?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation path	Can a rep go from record to campaign in one flow?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit math	What does 1,000 usable contacts actually cost?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending safety	Does it help reduce bounces and protect sender reputation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compliance	Does it support CAN-SPAM, GDPR, and opt-out rules?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Measurement	Can you tie outputs back to meetings booked?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Check Compliance First

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Fix list rules before the first campaign.

- Sender identity:** Use accurate From, To, Reply-To, and routing domain details.
- Subject line:** Match the email's actual offer, meeting ask, or reason for contact.
- Physical address:** Add a valid business mailing address to commercial emails.
- Opt-out process:** Make unsubscribe clear and process requests within 10 business days.
- B2B data:** Check UK GDPR rules when using named business contacts.

SECTION 05

# Pilot Before Rollout

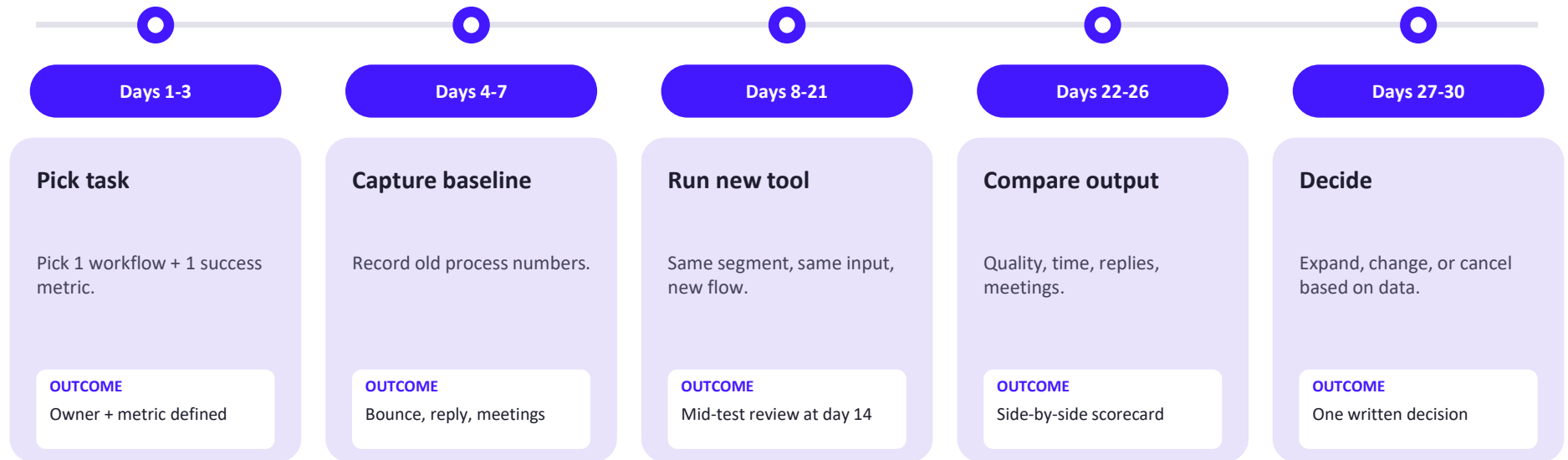
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One measured test beats a full team mandate.

05

# Thirty-Day Pilot Plan

Run the new way beside the old way.



# Decide With Data

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Keep the tool only if the workflow improves.

- Time saved:** Did the task take 30% less rep or ops time?
- Output quality:** Did 80% of records, drafts, or notes pass review?
- Reply impact:** Did reply rate or meeting rate improve versus baseline?
- Bounce control:** Did verified lists reduce hard bounces below the old rate?
- Rep adoption:** Did 1 skeptic agree the workflow made the job easier?

## DECISION

- Expand**  
Roll out to wider team.
- Adjust**  
Refine workflow, retest 30 days.
- Cancel**  
Drop tool, keep old process.

READY TO RUN IT?

# Run It In Sparkle.io

Verify, warm, send, and manage cold email from one place.

Cold Email

Email Verifier

Email Warmup

Smart Inbox

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