

◆ OPEN-SOURCE AI PLAYBOOK · FOR SALES

Account Research & Outreach

Reps spend more time researching accounts than talking to them.

THE SYSTEM

Profiles each target account, finds the right people and drafts a first email worth replying to.

BUILD TIME

1-2 weeks

HOW IT'S BUILT

Low-code

WORKS WITH

HubSpot or Salesforce

OWNER

Head of sales or a RevOps lead

How it works: five sources in, one page a rep can trust

1 Where it looks**A Company site**

What they sell, who they sell to and where they operate

B News and press

New sites, funding, launches and leadership changes

C Job posts

What they're hiring for, and the problems the ads describe

D People data

Who owns the problem, their role and how long they've held it

E Your CRM history

Past calls, old deals, who said what and why it stalled

2 The dossier**Corvane Freight**

Freight broker · Columbus, Ohio **A**

WHY NOW

B Opened a second cross-dock in Indianapolis in September

C Hiring two pricing analysts. The ad asks for spot quotes "in under 15 minutes"

E Spoke with us in March 2025: good fit, stopped at budget. New budget year starts in January

BUYING COMMITTEE

DW **Dana Whitlock**
VP Sales
Decides

ER **Elena Ruiz**
CFO
Signs off budget

MO **Marcus Oyelaran**
Director of Pricing
Champion

TB **Tom Becker**
Senior Broker
Uses it daily

3 The first email

To **Marcus Oyelaran**

Subject **Pricing the Indianapolis lanes**

Hi Marcus,

B Congrats on the new Indianapolis cross-dock. That's a lot of new lanes to price at once.

C Your pricing analyst ad asks for spot quotes in under 15 minutes. That's the job Laneway does: it reads the shipper's email and drafts the priced quote.

E Dana and I spoke in March 2025, when the timing wasn't right. With your new budget year starting in January, is it worth a fresh look?

Happy to show you on one of your own lanes. 20 minutes next week?

Sam

4 The rep edits and sends

Checks each personal line against its source, rewrites what doesn't sound like them, then sends from their own inbox or skips. Nothing goes out on its own.

✓ Send

Sample dossier and email, fictional companies and people. The letters A-E show which source each line came from.

What the rep sees: a queue with reasons

Corvane Freight

Draft ready

B New cross-dock in Indianapolis · Marcus Oyelaran

Tillman Cold Chain

Draft ready

D New VP Operations started in August · Renee Achebe

Oakhurst Produce Lines

Draft ready

C Four dispatcher roles open, ads mention “manual quoting” · Luis Moreno

Pell & Grant Distribution

Needs a look

E Asked for a demo in 2024, but that contact has left

Sundry Lane Transport

No reason yet

Nothing new since last quarter

Sample queue, fictional companies. No real reason to write means no email.

Where it stops

WHAT IT DOES

- ✓ Reads public business information and your own CRM
- ✓ Writes a one-page dossier for each account, with sources
- ✓ Drafts a first email from the dossier, in your voice
- ✓ Saves the dossier and the sent email to the account record
- ✓ Says so when there's no real reason to write yet

WHAT IT NEVER DOES

- ✗ Send an email on its own
- ✗ Make up a fact, a quote or a shared connection
- ✗ Use anything personal: family, health, home life, politics
- ✗ Scrape behind a login or ignore a site's terms
- ✗ Write to opted-out contacts or another rep's accounts

Can we build it? FOR YOUR TECH LEAD

Tools you'll use

Accounts, contacts and history	HubSpot or Salesforce	or Pipedrive, Attio
Company and people data	Apollo	or Clay, ZoomInfo
News, job posts and the web	Perplexity API	or Exa, Tavily
Writing the dossier and the draft	Claude	or ChatGPT, Gemini
Running the steps	n8n	or Make, Zapier
Where the rep edits and sends	Drafts in Gmail or Outlook	or Outreach, Salesloft, HubSpot sequences

Three ways to build it

Start simple 1-2 days

A Claude or ChatGPT project with web search and your offer. The rep pastes in the account and the CRM notes, then copies the draft.

Production 1-2 weeks

n8n takes target accounts from the CRM, researches each one, saves the dossier to the record and drafts the email in the rep's inbox.

Custom 3-4 weeks

Scores signals across the whole target list so the strongest reasons come first, and learns from which drafts got replies.

Access it needs

- ◆ Read access to accounts, contacts, deals and activity in the CRM
- ◆ Permission to add notes to accounts and create drafts in each rep's inbox, never to send
- ◆ API keys for the data provider and the research tool

Guardrails

- ◆ Drafts only: the rep sends, edits or skips every email
- ◆ Every personal line cites a source. No source, no line
- ◆ Public business facts and your own CRM only. Nothing about family, health or home
- ◆ Skips opted-out contacts, open deals and accounts another rep owns

What to measure

- ◆ Research time per account, before and after
- ◆ Reply rate on researched emails against your template
- ◆ Share of drafts sent with light edits, not rewritten
- ◆ Meetings booked per rep per week

Who builds and runs it

A sales or RevOps lead who knows what a good reason to write looks like, plus someone comfortable with n8n and APIs for the first one to two weeks. After that, RevOps tunes the signals monthly and reps review their own drafts.

◆ **FREE, OPEN SOURCE, NO SIGN-UP**

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

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16 Sales-to-Delivery Handoff
17 Invoice & Collections Chaser
18 Candidate Shortlist System
19 Contract Risk Review
20 New-Hire Onboarding

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In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.



Pallav Kaushish

Co-Founder, AiXGrowth

Free 30-minute call · No commitment

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